

The Experience of Social Policy

Reform for Voluntary Advice

Organisations:

A Multi-Site Case Study in Liverpool

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Declaration

I, **Jordan Griffiths** confirm that the work presented in this thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis.

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Abstract

Social policy reform following the Welfare Reform Act 2012 has led to a shift in demand for voluntary advice organisations that are both advising on and dealing with issues related to these changes simultaneously. The existing body of literature focusses on the operations of advice organisation Citizens Advice, this thesis expands the body of knowledge through an exploration of varying structures of voluntary advice organisations. The social policy reforms that have been introduced following the Welfare Reform Act 2012 are disproportionately affecting the most vulnerable individuals in society, although there remains little insight into the voluntary advice organisations that help individuals navigate these changes. Therefore, the main aim of this thesis was to gather an understanding of these experiences for voluntary advice organisations in order to aid future perceptions of social policy reform in the sector.

Liverpool, one of the most heavily impacted cities following these reforms, was used as the fieldwork site for this research. Three case study sites were explored with voluntary organisations that varied in organisational structure, *Federal*, *Local Providing* and *Local Empowering* to discover how their experiences differed. Qualitative interviews were carried out with representatives from the roles within the hierarchy of each organisation, gathering comparative data regarding the differences in the experience of volunteers, employees and managers. This thesis reveals that volunteers at the ‘front-line’ of advice experience change most significantly as they develop the closest relationship to service users and their issues, whilst keeping abreast of fast-paced change within their often-irregular voluntary roles.

This thesis also provides an understanding of the provision of advice at varying structures of voluntary advice organisations, exploring their role and the relationships that occur within local communities. *Local* organisations for example, have greater autonomy to provide advice that is community focussed. It contributes to the existing body of knowledge as it investigates a variety of organisational structures, highlighting that the experiences of social policy change do occur in different ways both within and between voluntary advice organisations. This thesis offers a broader understanding of the way in which voluntary advice organisations experience social policy reform, dependent on their organisational structure and their hierarchical relationships with service users.

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Abbreviations

DWP	Department of Work and Pensions
DLA	Disability Living Allowance
ESA	Employment Support Allowance
LASPO	Legal Aid, Sentencing and Punishment of Offenders Act 2012
LGBT	Lesbian, Gay, Bisexual and Transgender
NCVO	National Council for Voluntary Organisations
PIP	Personal Independence Payment

1 Introduction

1.1 Rationale for the Research

This thesis is concerned with the experience voluntary advice organisations have with the social policy reforms introduced since the Welfare Reform Act 2012 and how these experiences differ between organisations with varying structures and a variety of staff and volunteers' roles. Arguments presented throughout highlight that the experiences of social policy reform differ amongst the three case study sites involved in this research due to their structural differences, which can help further understanding of the voluntary advice sector in the wider field. This research uses Liverpool as a fieldwork site. This is an area that is constituted with a large number of neighbourhoods that are living in high levels of multiple deprivation (Department for Communities and Local Government, 2015) and voluntary advice organisations in the local area provide a much-needed service to many individuals (Organ and Sigafos, 2017). There is little known about voluntary advice organisations and it is particularly important to understand their role in the local community, given the large-scale social policy reforms and austerity measures in England and their implications. Much of the research that exists concerning voluntary advice and the organisations that provide it is rooted in the work of the Citizens Advice (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). This is often concentrated on the specialist advice that is offered at Citizens Advice, some of the most in-demand topics being debt, housing and employment (Citizens Advice, 2018a). This is mirrored in existing literature that focuses on the provision of employment advice (Abbott, 1998; 2007; McDermont, 2013), racial and identity issues (Holgate et al., 2012), and the general challenges of Citizens Advice services during the era of austerity (McDermont, 2013; Kirwan, 2017a). These investigations are of significance in the current policy climate in England, given the fast-paced social policy reforms, such as Universal Credit, Personal Independence Payment (PIP) and the 'Bedroom Tax', more formally known as the Spare Room Subsidy of the Welfare Reform Act 2012. These policies are affecting service users of voluntary advice organisations and increasing complexity at these

organisations (Kirwan, 2017a; Organ and Sigafos, 2017). It is, therefore, imperative to explore how these experiences differ between organisations and if this alters the provision of advice to help fully understand the relationship between the provision of voluntary advice and the recent social policy reforms. It is the role of this thesis to provide an in-depth case study of three different voluntary advice organisations and therefore expand the extant literature in building an understanding of how both *Federal* and *Local* organisations provide advice.

1.2 Setting the Scene: The Social Policy Context

This thesis concentrates on the social policy reforms that have been introduced in England and wider areas of the United Kingdom as a result of the Welfare Reform Act 2012. They have been stated as some of the most significant in British history (Makowiecki, 2015), coupled with austerity measures (Levitas, 2012; Cooper and Whyte, 2017) and a period of increased poverty and demand for advice services (Organ and Sigafos, 2017). This has created a precarious climate for voluntary advice organisations and this thesis contributes to the extant knowledge base by exploring the differences in experiences of social policy reform for voluntary advice organisations that can help organisations and the people that operate within them shape their perception of change.

Although this thesis concentrates on the social policy reforms post-2012, it is important to highlight that social policy reforms that have occurred in other time periods have significant effects on the voluntary sector. For instance, the neoliberal policies of the Thatcher era brought about greater involvement for the voluntary sector due to the shrinking of the state (Wilding, 1992). The New Labour social policies beckoned an era of partnership between the two sectors (Lewis, 2005; Alcock, 2010b; Alcock et al., 2012; Macmillan, 2013a), a concept that has subsequently diminished following the Welfare Reform Act 2012. It is however, the social policy reforms post-2012, including the general reduction in public spending, the benefit cap and specialised reforms such as Universal Credit, Personal Independence Payment and the 'Bedroom Tax' and the levels of poverty in England, that have created a recent cause for concern (Levitas,

2012; Makowiecki, 2015; Field and Forsey, 2016; Millar and Bennett, 2017; Larkin, 2018). Poverty remains much higher in workless households than those in work, for instance in the year 2013 to 2014, 63 percent of working-age households with all adults out of work were ‘poor’, compared to 9 percent of households with all adults in work (Field and Forsey, 2016). Policies are designed to protect and prevent poverty through the promotion of work, but there is no ‘fail-safe protection against poverty’ (Field and Forsey, 2016: 66). These policies, framed by central government to give power to market forces have been driven by a rhetoric that emphasises ‘worklessness and dependency’ ultimately placing blame on the individual choices made in society as opposed to government action (Wiggan, 2012).

One of the key principles introduced to address the issue of worklessness and dependency is Universal Credit; although the policy is flawed and driving people to suffer from more complex issues than ever before, creating an increased demand for voluntary advice organisations that are already facing significant changes (Kirwan, 2017a; Organ and Sigafos, 2017). Universal Credit is a new benefits system for working-age individuals currently claiming out-of-work benefits and Tax Credits (Wiggan, 2012; Dwyer and Wright, 2014). It combines out-of-work and in-work support into a single system and monthly payment which will shadow how wages are largely managed in the labour force. In its mission, Universal Credit combines six existing benefit payments, into a single monthly payment. These include Income Support, Income-Based Jobseeker’s Allowance, Income-Related Employment Support Allowance, Housing Benefit, Child Tax Credit and Working Tax Credit (Dwyer and Wright, 2014). Universal Credit also takes into account any household earnings and automatically updates the payment to be delivered, tapering off as earnings reach a particular amount and Universal Credit is no longer required (DWP, 2010). The policy is arguably the flagship of the Coalition and subsequent Conservative government’s social policy reform ideals. There are three major objectives that the introduction of Universal Credit will work towards; to simplify work-age benefits; to make work pay, and to reduce fraud and error. Although financial incentives are one of the main drivers of Universal Credit, the pioneering policy aimed to improve welfare to work with tough sanctions in place to

deter non-compliance with the programme (Pennycook and Whittaker, 2012). Although this was designed as a single payment that encapsulated a number of benefits, it was not the policy that was delivered. There have been several infractions in the continuing development of Universal Credit, for instance, it does not include Council Tax support. Claimants must apply for this separately and there are instances where local authorities are introducing means-tests and withdrawing Council Tax support for Universal Credit claimants, ultimately leaving them worse off (Field and Forsey, 2016).

A further reform that has been introduced to social policy in recent years, and is having a significant impact on many individuals in society and the voluntary advice organisations that support them is Personal Independent Payment (PIP). The Coalition government argued that its predecessor Disability Living Allowance (DLA) had become too complex and confusing for both service users and administrative departments (DWP, 2010). The aim of the reform was to make the system more user-friendly, reduce the expenditure on disability payments and support disabled people to overcome barriers that constrain their everyday lives. In order to carry this out, the Department concentrated its efforts on those who they considered most at need, therefore re-assessing the eligibility of those who were in receipt of DLA and of working age (DWP, 2010). The primary aim of PIP was to reduce expenditure and increase the quality of life for disabled people in the UK. However, the estimated annual cost of the reformed policy is now £2 billion higher than under DLA, with a significant number of claimants being overlooked for the benefits, causing undue complications to their everyday lives due to appeals, and an overall lack of public trust in the new benefits system (Gray, 2017).

The third example of welfare reform that this thesis examines is the Removal of the Spare Room Subsidy, more commonly known as the 'Bedroom Tax', which has contributed to an increase in vulnerable people in poverty and needing advice (Kirwan, 2017a). It was brought into effect in April 2013 and sought to reduce Housing Benefit for working age social tenants who reside in a property with more rooms than the criteria set by the Department of Work and Pensions (DWP, 2012). Households deemed to have 'additional' rooms have experienced reductions in the amount

of rent eligible for Housing Benefit; 14 percent for one additional bedroom and 25 percent for two or more additional bedrooms (Field and Forsey, 2016). Whilst this was introduced in excess of five years ago, the effects of the 'Bedroom Tax' remain in place, and it has brought with it an increase in poverty as the cost of living is now often out of reach, with subsequent increases in rent arrears (Gibb, 2015). Field and Forsey (2016) elucidated that by July 2014, in the early stages of the 'Bedroom Tax', 57 percent of affected claimants had resulted in cutting-back on household essentials following the introduction. Furthermore, there are wide-ranging effects on health, well-being and social relations that can be directly associated with the cost implications of the social policy reform of the 'Bedroom Tax' (Moffatt et al., 2015) (elaborated in section 2.2.1.3).

The Coalition (2010 to 2015) and Conservative (2015 to present) governments have sought to dismantle the welfare state through their tightening fiscal policies and emphasis on alternative providers of welfare, such as the voluntary sector via the 'Big Society'. The welfare state arose from Beveridge's *Social Insurance and Allied Services* report in 1942, which stated that greater measures needed to be implemented in order to eradicate the five giant evils in society; squalor, ignorance, want, idleness and disease (Beveridge, 1942; Beech and Page, 2015). These views have not been executed through the Coalition (Cameron/Clegg) or Conservative (Cameron and May) governments. The universal social state has been replaced with a complex, means-tested system, although it is argued that the Beveridge vision for state intervention has been driven out of the political vision since before the general election of 2010 (Page, 2015).

Austerity measures introduced since 2010 have been far-reaching. Cooper and Whyte (2017) arguing that the most disadvantaged in the United Kingdom are also the worst affected by social policy reform and austerity measures, or what they term 'deceptions'. Firstly, the authors argue that the government places blame on individuals in society for the decisions of the government to introduce austerity measures into economic and social policy. This is followed by the rhetoric that austerity or 'fiscal pain' is necessary to recover the budget deficit and social ills. Thirdly, in order for society to become fully functioning, it is up the communities of the country to initiate this. Cooper and Whyte (2017) therefore argue that these 'deceptions' are driven towards further

alienating the most disadvantaged in society. Along with these social impacts of austerity, the availability of Legal Aid has been significantly reduced and families with children have experienced the erosion of Working Tax Credits and a freeze of Child Benefit (Levitas, 2012; Kirwan et al., 2017). These measures, as well as other social policy reforms that have been brought in within the same time period, have ultimately led to an increase in the number of households who are living in poverty across the United Kingdom (Levitas, 2012). This is of particular importance for this research as it has been found that increased levels of poverty can lead to a wider spread demand for voluntary advice services (Kirwan, 2017a; Organ and Sigafos, 2017). Whilst this finding exists in the literature, the extant knowledge base ignores several important features of voluntary advice organisations. For instance, the differences that occur between the experiences of the volunteers and employees within them and how this may ultimately affect the provision of advice at an organisation. This is a hole that this thesis clearly addresses, through the exploration of hierarchies at each case study site to understand how different roles with voluntary advice organisations experience social policy reforms and the issues that service users are dealing with.

Both Knight (1993) and Anheier (2000) have highlighted the significance of hierarchies in voluntary organisations. They are a complex concept, for some organisations thrive both in terms of efficiency and effectiveness with a hierarchy whereas others work with a more flexible internal organisation pattern. Organisations that are hierarchical often display a style of top-down management approaches and emphasis vertical relations amongst individuals within the organisation (Anheier, 2000). The concept of hierarchies is used in more recent voluntary advice studies, demonstrating the relevance and importance of the concept for the case study sites involved in this thesis. McDermont (2013) highlights that a difference between the roles of volunteers and employees does exist with volunteers, who are substantially trained, take up the role of ‘front-line advisers’ and they are supported by paid staff and managers (2013: 222)

The extent and experience of austerity measures cut deep within society, particularly with an increase in expectation for volunteers and members of the community and voluntary

organisations to take up social and care roles that were previously provided by the state. The ‘Big Society’ was the reintroduction of communitarian politics, handing power to communities and away from the state (Alcock et al., 2012; Macmillan, 2013a). This thesis uses Delanty’s (2003) definition of communities, as a social organisation that is based on the collection of small groups such as neighbourhoods (further elaborated in section 2.4). For this thesis, communities of voluntary advice organisation are understood to be the surrounding areas of the organisation, where many service users and volunteers reside. This can therefore determine the relationship between the organisation and their local community. This is particularly important to consider in terms of communitarian politics as these groups within society were and continue to be given responsibilities for local affairs that were once the priority of the state. The vision of the ‘Big Society’ for the government was to encourage the development of society to offer a greater level of solidarity and community cohesion with the emphasis being placed on voluntary action. However, the reality has not played out this way with several groups of society, such as those in receipt of benefits, the disabled, both the young and old suffering more in recent years than they did during the recession years following the financial crash of 2008 (Levitas, 2012). Despite this, May’s Conservative government have moved towards a ‘Shared Society’, remaining in the realms of communitarian politics, with emphasis on the networks and relationships that individuals build to be the cornerstone for care and voluntary organisations and the government to support alongside this action (Aiken and Harris, 2017).

Voluntary advice organisations are at an unusual but critical point of operation due to social and economic pressures that have developed since the financial crisis of 2008 and the introduction of austerity measures in 2009. Austerity is framed in this context as the reduction in public sector spending (Levitas, 2012). Whilst the introduction of austerity was viewed as an inevitable course of action by many politicians and members of the public alike, it has little in common with economic policy as it brought about considerable harm to society (Wren-Lewis, 2015). This era of ‘tightening our belts’ and filling the gaps left by public sector cuts has had a detrimental impact

on the availability of resources for voluntary advice organisations, coupled with austerity measures taking hold of the funding system (Kirwan et al., 2017: 1).

Following the increase in social policy reforms and emphasis on community cohesion, more is expected of voluntary organisations than ever before. This is of particular prominence to this thesis as Liverpool is one of the worst affected areas for losses per working-age adult, with an expected loss following the full rollout of policies of the Welfare Reform Act 2012 of £700 per annum (Beatty and Fothergill, 2014; 2016: 19). This is coupled with job losses and dwindling voluntary sector resources which are putting greater pressure on an already pressurised local sector (Organ and Sigafos, 2017).

1.3 Voluntary Advice

Advice organisations play an important role in the voluntary sector in England. Voluntary advice is the provision of supportive assistance driven towards providing service users with the tools they need to make informed decisions (Kirwan et al., 2017). In recent years, the demand for voluntary advice has increased, surpassing the availability of advice services although figures for the extent of this remain unknown. This is due to both the social policy reforms and austerity measures introduced and the evolution of the voluntary sector, which has led to a decrease in resources in keeping with the drivers of change identified by Kellock-Hay et al. (2001) and Cameron and Green (2015) (elaborated in section 1.3.1). This leaves voluntary advice organisations at a precarious junction of change and reform whilst dealing with a significantly complex array of issues (Kirwan et al., 2017).

The British voluntary sector is a vast, complex web of interconnecting institutions. The boundaries between voluntary, private and statutory services are blurred, indicating that the public and often the government has an incomplete perception of what the voluntary sector embodies (Wolfenden Committee, 1978; Rochester et al., 2010). This is because the definitions, roles and boundaries of voluntary organisations and voluntary action are not clearly identified and synonymous throughout society (Rochester et al., 2010). This thesis will adopt the National

Council for Voluntary Organisations (NCVO) ‘general charities’ definition of the sector, which includes all registered charities exclusive of those ‘controlled by government, independent schools, religious organisations’ (Clark et al., 2012: 17). This definition and the Charity Commission provide a continuous understanding of the current climate of the voluntary sector. However, they are often conflicting in their conclusions, particularly when describing the size, functions, values or services offered by voluntary organisations. This signifies that the definitive boundaries of the voluntary sector are ‘blurred rather than neatly defined’ (Kendall and Knapp, 1995: 67). Therefore, it is important to investigate and understand the differences in the provision of advice, the implications of social policy reform on voluntary advice organisations and their relationships with the local community. This thesis addresses this lacking knowledge base and furthers the understanding of the role of voluntary advice organisations in society and the services they provide.

It is important to understand the role of the voluntary sector in North West England, in particular, the Liverpool City Region. The North West has been experiencing the highest demand for voluntary services, which include advice and in this area, demand significantly outweighs the growth in provision (Church Urban Fund, 2012). There are 8,638 voluntary organisations based in the Liverpool City Region, made up of approximately 3,100 registered organisations and over 5,000 organisations that are not registered with an official body (Jones and Meegan, 2015; Jones et al., 2016). The North West has a particularly high dependence on public sector funding (Clifford et al., 2010). However, the sector demonstrates a resilience due to the disproportionate distribution of public sector cuts, with Liverpool experiencing the third highest for local authority spending cuts in the country (Jones and Meegan, 2015). This signifies that cuts to public spending and public sector trust can disproportionately influence voluntary advice organisations, especially in tumultuous areas such as Liverpool.

As stated previously, literature surrounding voluntary advice is largely framed around the work of Citizen’s Advice, and the specific lines of advice giving available through the *Federal* organisation (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). With

this limited knowledge base, little comparison can be drawn between different structures that exist for voluntary advice organisations. This thesis contributes to this knowledge by offering insight into the case study sites structure and provision of advice as well as their experiences of social policy reform that may later inform voluntary advice organisation on these experiences and how they influence advice-giving and relationships.

As there is a lack of formal differentiation between voluntary advice organisations in the literature, this thesis adopts Knight's (1993) definitions of organisational type, namely; *Federal*, *Local Providing* and *Local Empowering*. Knight (1993) carried out a comprehensive study of voluntary action, analysing national voluntary organisations, different localities and the action that occurs in each of these localities. The large-scale research provided terms and descriptions of voluntary action that will be used as definitions of the organisations involved in the research henceforth. Multiple structures and activities of organisations were identified, the definitions have been selected following the rationale of the study. The *Federal* organisation, *Sierra* is affiliated to a national voluntary organisation with local control of resources. There are multiple forms of *Local* organisation identified in the study. The action of the two *Local* organisations in this thesis is 'servicing', with Knight (1993) identifying that 'servicing' organisations can provide services or use their services to empower. Therefore, this thesis has used these definitions to term the organisations *Local Providing, Acadia* and *Local Empowering, Redwood* (as demonstrated in Table 1).

Knight's Defining Title	Organisation	Affiliation	Provision	Other Qualities
<i>Federal</i>	<i>Sierra</i>	<u><i>Federal</i></u> Local branch of a national charity	Determined by national body	<ul style="list-style-type: none"> – Branch of a national body – Control of local resources – Autonomy to develop projects – Responsible for own affairs – Must conform to regulations of national body
<i>Local Providing</i>	<i>Acadia</i>	<u>Incorporated</u> Legally incorporated as a charity	<u>Servicing</u> Provide a needed service for or with their local community	<ul style="list-style-type: none"> – Provides services for the community – Recently become local from <i>Federal</i>, retaining some corporate tendencies
<i>Local Empowering</i>	<i>Redwood</i>			<ul style="list-style-type: none"> – Embedded in local community – Provides services with members of the local community

Table 1: Definitions of Case Study Sites (Knight, 1993)

1.3.1 The Drivers of Change

Drivers of change have been identified for organisations (Cameron and Green, 2015) and more specifically voluntary organisations (Kellock Hay et al., 2001). These are both key studies for this thesis, and as a result it uses both studies to conceptualise drivers of change for voluntary advice organisations. Consequently, the terminology regarding the drivers of change will be described as; political forces, funding and the evolving architecture of the voluntary sector. Cameron and Green (2015) have examined the practice of change management for organisations in general. Whilst this is not specifically voluntary sector related, the three drivers of change that will be conceptualised are also recognised within the study. Political forces relate to the ways in

which organisations and decision makers within organisations are held accountable to the decisions of politicians and the wider political context of society. Funding is a driver of change as it inevitably influences change and change management for organisations due to the significant levels of economic uncertainty on a global scale. Finally, Cameron and Green (2015) argue that change is often triggered by movements in the market or sector and therefore the capability of an organisation can be questioned. These movements of markets can alter what it means to be a voluntary organisation in society. This leads to an evolution of organisations and the understanding of what it means to be an organisation in a given sector during significant environmental shifts such as austerity, changing government power or more general market and societal changes. This understanding of the ever-changing roles of organisations in sectors, in this instance the voluntary sector, is coupled with Kellock Hay et al.'s (2001) definitions of voluntary sector change and throughout this thesis is understood to be the third driver of change, termed the evolving architecture of the voluntary sector.

Kellock Hay et al. (2001) identified that these three specific drivers of change exist for voluntary organisations, although this is now an outdated study of human resource management and change for the voluntary sector. Political fluctuations influence change in organisations regarding government re-organisations, the others found this to be particularly relevant when government changes occur in a close time period to the research study. Funding can promote organisational change as the need to access funding and alterations in the patterns of funding can modify the operations of an organisation and the way in which contracts are offered. The final driver, termed in this thesis as the evolving architecture of the voluntary sector, is identified by Kellock Hay et al. (2001) as the changing role of the voluntary sector in society. This is an important consideration for understanding what lies beneath organisational change in voluntary organisations. In identifying the changing role of organisations and the sector in society, Kellock Hay et al. (2001) refer to the growths and slumps that occur more generally, as well as the relationships the voluntary sector has with both the public and private sectors.

These relationships change throughout time periods, particularly as governments in power fluctuate, for example. Harris (2010) states that the voluntary sector and the state have sought a partnership with each other for a number of years. However, the extent of this or the nature of the relationship between the two sectors can differ across time periods or governments. For instance, the involvement of the voluntary sector and organisations during the Conservative government (1979-1997) was understood to suppress the provision of state welfare. This evolved during the New Labour era as the voluntary sector was more heavily involved in providing and helping to expand public welfare services. In the current political climate, the voluntary sector is situated in an environment that produces uncertainty and precarity for voluntary organisations (Alcock et al., 2012).

Other research has considered change in the voluntary sector (see, for example: Deakin Commission, 1996; McCabe and Phillimore, 2012; Macmillan, 2014a; 2014b; Lindsey et al., 2018). However, these specific drivers of change are the central focus of change for this thesis as they allow change to be highlighted in terms of voluntary advice and provide an opportunity for voluntary advice organisations to identify how to manage the experiences of change in the future.

1.4 Case Study Organisations

The research presented was conducted with three case study organisations that have been given the pseudonyms *Sierra*, *Acadia* and *Redwood*.

Sierra

Sierra, as based on the *Federal* model by Knight (1993) is a local branch of a national charitable body. This model identifies that organisations such as *Sierra* work in unison with the national body, but each branch has control of local resources and therefore autonomy to develop local projects as well as those that are represented by the national body. *Sierra* is responsible for their own affairs, including funding and any potential financial difficulties, whilst working publicly through the national brand name. Therefore, *Sierra* as a local branch must conform to rules and

regulations in order to continue with their advice-giving operations. *Sierra* operates from three local offices, offering a number of services including general advice that largely covers benefits related issues, as well as more specific project-based advice such as debt, housing and money advice.

There are advantages attached to this *Federal* model for the service user, as well as the employees or volunteers who are dealing with a particular issue. The service user's background information is available on a shared resource system, something that interviewees revealed to be important when dealing with often multiple issues at any one time. Volunteers also benefit from a national intranet to draw information from, a tool that is utilised in self-help-based sessions and as an additional resource for more complex appointment-based sessions. This allows the branch and wider national body to maintain continuity in the advice being given. Since the completion of fieldwork with *Sierra*, the organisation has merged with another local branch of the national body, a choice of the national body and not the branch. Therefore, the operations from the three offices that were involved in this research have been significantly reduced and some completely removed from the community, with a number of participants, including the manager, employees and volunteers leaving their roles with the organisation.

Acadia

Acadia is a *Local Providing*¹ organisation, as described by the tendencies of *Local* voluntary organisations by Knight (1993). This emphasis on providing services *for* the local community has been reached as *Acadia* was previously a *Federal* organisation affiliated to a national charitable body. In 2016 this affiliation was detached and the organisation began offering advice-based services as a *Local* organisation, following investigations into their practices and procedures. There were concerns from the national body regarding their sustainability to provide the reputable advice that the national body was accustomed to. *Acadia* was not keen to dissolve the organisation fully; being aware of the negative implications this could have for their service users. They,

¹ The term *Local Providing* is adapted from Knight's (1993) typology of voluntary organisations

therefore, transitioned into the *Local* organisation, which although had its challenges, also brought with it several positive aspects concerning advice giving in the voluntary sector, for instance greater freedom and flexibility.

The organisation operates out of two offices, one based in a city centre location within a corporate office building and the other within the Family and Civil Court. These two locations offer different themes of advice. The city centre location offers general and project-specific advice on a walk-in and appointment basis. There are teams of employees who operate out of the city centre location, supported by a pool of volunteers. The court-based office deals solely with housing and eviction issues, often without any prior appointment booking. This is described as an ‘emergency service’ by *Acadia* as it is offered only to individuals who are attending the court and are often facing eviction or court rulings on the same day. The organisation provides immediate advice and supports the individual through their court hearing procedure.

Redwood

Redwood is a *Local Empowering*² organisation as described by Knight (1993). The organisation, similarly to *Acadia* is legally incorporated as they have a board of trustees that oversee practices and procedures. However, they operate in a much more community-based form, working *with* members of the local community. Therefore, their operation is viewed as *empowering* the local community as they provide a much-needed service, but this is delivered alongside the people that need it most as opposed to formal advice-giving that is delivered *for* the individual.

The organisation has one community-based centre from where all of its projects are delivered, these include a range of programmes such as men’s health, gardening, a veteran’s programme and youth unemployment. Advice is delivered through these programmes in an informal manner, as opposed to the organisation’s *Federal* counterparts who offer more formal ‘sit-down’ or interview style advice. Operating in this manner allows the organisation to help a wide range of individuals, provide activities and further skills in the process of advice-giving. More general

² The term *Local Empowering* is adapted from Knight’s (1993) typology of voluntary organisations

advice is also offered, particularly through the free-to-access computer hub that is located in the reception area of the centre.

1.5 Aims & Research Questions

The main aim of this research is to investigate the experience of post-2012 social policy reforms for voluntary advice organisations and the people within them in the Liverpool City Region. It was important to gain a deep level of understanding through qualitative research and as a result, multiple, broad research questions were developed to build a full picture of each organisation and the study overall. These research questions derived from an initial literature review that identified multiple gaps in the knowledge of voluntary advice. Whilst these questions were informed with an initial guidance from wider literature, the semi-structured, qualitative nature of the research allowed the study to be directed by the responses of the participants, seeking to explore and understand the experiences of voluntary advice organisations and their employees and volunteers.

The specific research questions are:

- I. How do differently structured voluntary advice organisations experience the post-2012 social policy reforms?
- II. What is the perception of social policy reform and austerity measures of managers, employees and volunteers in voluntary advice organisations?
- III. What are the challenges and opportunities for voluntary advice organisations in the current policy context?
- IV. To what extent does the local community impact on the provision of advice by voluntary advice organisations?

1.6 Structure of the Thesis

This thesis considers the experiences of advice organisations with varying structures through the investigation of the differences in the provision of advice and the experiences of social policy reform from both organisations and the people within them. This is in contrast to much of the

literature available that investigates the voluntary sector as a whole without a specific focus on advice-giving organisations or, is concentrated on the specific role of the Citizens Advice (ibid.). This research is particularly important during the current economic, political and social context in which this research sits. Voluntary advice organisations are meeting a crucial need in society, as well as facing increasing resource cutbacks and this thesis provides an understanding of those experiences from both within and between organisations.

Chapter Two offers a comprehensive definition of voluntary advice, and how it is situated with social policy reform. It reviews the literature and current understanding of voluntary advice organisations in England, highlighting the current one-dimensional arguments provided around Citizens Advice. The chapter also examines a recent history of social policy reform, specifically the introduction of Universal Credit, Personal Independence Payment and the Spare Room Subsidy otherwise known as the ‘Bedroom Tax’. An analysis of the recent transformations that the voluntary sector has undergone as a result of austerity is carried out, drawing out implications for the voluntary advice sector and the individuals that use their services. As the sector is currently in a precarious phase with funding and resources being reduced and demand increasing, it becomes important for organisations to concentrate on their mission, a phenomenon that this thesis examines. The chapter then moves on to concentrate on the role of the community and the relationship an advice organisation can have with them. A more specific account of the provision of voluntary advice in Liverpool is also given, to situate the research. This highlights the advice-giving voluntary action in the Liverpool City Region and the significant need for these services due to the severe levels of deprivation and poverty in local communities. This chapter situates this empirical study in the extant literature. It demonstrates the need for more detailed understandings of voluntary advice and its relationship with both social policy reform and its local community.

Chapter Three offers the methodological justification for the research. In order to gather a robust and deep level of understanding of voluntary advice in Liverpool, this research was carried out using a multi-site case study, made up of three organisations. This chapter outlines the

methodological assumptions of interpretivism and constructivism that underpin the research, highlighting the importance of understanding and subjectivity in the process of gathering qualitative information. The chapter then details the research design, identifying the advantages of a case study approach in comparative research. The breakdown of sampling techniques and division of participants across the three organisations is also discussed as well as details of qualitative interviewing technique that was adopted. An exploration of the advantages and disadvantages of semi-structured interviewing is important to include as much of the available case study research in the voluntary sector is carried out using multiple methodological techniques, including surveys, interviews and observation (see, for example: Scott and Russell, 2005; Mohan, 2010; Kirwan, 2017a). As this research seeks to gather information on the experiences of social policy reform it was therefore crucial to adopt a methodological technique that allowed the participant to express their feelings freely, and guide their interview as they saw fit. The chapter explores the ethical implications and reflective accounts of undertaking this research. It highlights the dual aspects of analysis that were carried out once data collection had been completed. This included a multi-level analysis to determine the similarities or differences between the experiences of staff levels within each organisation, identifying the key themes of each organisation and a comparison of each organisation using cross-case analysis.

Chapters Four, Five and Six present the findings of the empirical research carried out at each of the three organisations in detail. Each results chapter explores the key themes of the one organisation *Sierra, Acadia* and *Redwood* respectively. Each of these chapters provides background and context to one organisation, it then goes on to explore the following key themes; *Advice, Employees, Volunteers, Community, Funding, and the Drivers of Change*. The theme of *Advice* addresses the process of advice giving at each organisation and how advice provision is split between paid employees and volunteers. *Employees* address the motivations for taking up employment at a voluntary organisation, employee roles and the difficulties of both working in and employing paid members of staff in a voluntary organisation. *Volunteers* highlight the crucial work that volunteers carry out in each organisation, the role of advice giving and its challenges

both for the volunteer and the organisation. The theme of *Community* covers the relationship each organisation has with its community and the levels of local deprivation and need. Finally, *The Drivers of Change* covers the three drivers identified throughout this thesis, political forces, funding and the evolving architecture of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015). More specifically covering the significant changes to voluntary sector funding and the challenges this presents to advice services. The social policy reforms that were outlined in *Chapter Two* are then explored, investigating how these impact on the process of advice giving and the enquiries that the organisations deal with on a daily basis. Each of these themes, highlight key findings that emerged from each organisation. This indicates that there are significant differences between the experiences of social policy reform between the three organisations due to their structural differences. This is also applied to their differences in the provision of advice and relationship to the local community at each organisation.

As *Chapters Four, Five and Six* explored the multi-level analysis of the experiences of each level of staff within the three case study sites, *Chapter Seven* provides the details of the cross-case analysis. It identifies the key themes of each organisation, drawing these findings together into a discussion and situating them into the existing literature. The themes that form this chapter are; *Advice, Community, and Change*. *Advice* covers issues of hierarchy, casework complexity and the impact of social policy change. *Community* opens up a discussion of specific advice-based programmes and the importance of general advice, indicating the relationships that an organisation can build with the local community and the implications this has for the sustainability of advice. A detailed exploration of deprivation and the relationship voluntary advice organisations can have with deprivation is then provided. The final theme is *Change*, which highlights how the issues that are brought to each organisation are influenced by social policy reform. *Chapter Seven* solidifies the argument that experiences of social policy reform differ between the three organisations due to their structural differences. It is argued that the *Federal* organisation has the least autonomy over projects and advice meaning that they are more

susceptible to change induced by funders, whereas *Local* organisations have greater control over the advice given to meet the needs of the service user.

Finally, *Chapter Eight* concludes the thesis. It is within this chapter that the overall findings of the research are examined and concluding remarks are provided, reflecting on the research process and make recommendations for future research including voluntary advice organisations.

This thesis contributes to the extant knowledge in the field by moving away from the findings of Citizens Advice (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a) and towards understanding the experiences of both *Federal* and *Local* organisations. It further highlights that a difference in organisational structure can influence the experience of social policy reform and the provision of advice and this thesis providing further understanding of the voluntary advice sector in the wider field.

2 Literature Review

This chapter analyses the limited accounts for voluntary advice in academic debate (see, for example: Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Lee, 2014; Kirwan, 2017a). An analysis of the contemporary debates in social policy, in particular, three of the biggest reforms from the Welfare Reform Act (2012); Universal Credit, Personal Independence Payment, and the ‘Bedroom Tax’ is carried out. The chapter then moves on to provide a discussion of the voluntary sector concentrating on how voluntary organisations are influenced by social policy reform and the changes that have occurred in the sector in recent years and concludes with an analysis of the importance of community-level understanding for both social policy reform and voluntary organisations. This chapter argues that voluntary advice organisations are undergoing significant changes as a response to three drivers of change; political forces, funding and the evolving architecture of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015). The influx of change that is occurring for voluntary advice organisations, is experienced through both the issues that are dealt with by organisations and the internal organisational reforms taking place, prompting questions of organisational resilience, experiences of social policy reform and the relationship between communities and organisations.

2.1 Voluntary Advice

There is a limited knowledge of voluntary advice in England, with the body of knowledge focussing on the work of the *Federal* organisation Citizens Advice (for instance: Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). There is a need within the field to address voluntary advice that is provided by alternative organisations, including *Local* organisations in order to gather a fuller picture of the provision of voluntary advice, a need that this thesis addresses. Although work in this area is limited by its concentration on a single organisation Citizens Advice, there has been considerable progress in understanding the role of voluntary advice in society, providing insight into how voluntary organisations provide services that equip

individuals with information and skills to deal with issues they may be experiencing (see, for example: Abbott, 1998; 2007; Jones, 2010; Galvin et al., 2011; Holgate et al., 2012; McDermont, 2013; Lee, 2014; Kirwan, 2017a; Organ and Sigafos, 2017).

An overview of the provision of advice by Citizens Advice and the opportunities and challenges that they face has been provided (Kirwan, 2017a). Kirwan (2017a) discusses three specific research areas that are being experienced in England during the current era of austerity; access to advice, employment disputes and legal advice. An in-depth exploration of Citizens Advice, such as this, has begun to open up the understanding of the provision of voluntary advice, defining it as

‘Work oriented towards enabling clients to make informed decisions. Advice was seen as making comprehensible what was distant and unintelligible; it made possible those future actions that have been driven with foreboding and anxiety’ (Kirwan et al., 2017: 5).

This expression of voluntary advice differs from definitions offered amongst other voluntary sector literature, as the sector as a whole has been described as troublesome to define and a ‘loose and baggy monster’ (Kendall and Knapp, 1995: 66; Morris, 2000). The definition provided by Kirwan (2017a) has identified the role of voluntary advice organisations in society during the current era of austerity and social policy reform, such as the introduction of Universal Credit. Voluntary advice organisations, for instance Citizens Advice, have fewer resources and increased demand due to the existence of austerity measures within society and the tightening of funding in the voluntary sector (McDermont, 2017). Additionally, there is an increasing pressure on voluntary advice organisations as they are operating with fewer voluntary staff given the uncertain economic climate (Organ and Sigafos, 2017). These studies have provided a significant insight into the challenges that voluntary advice organisations face and the existence of change, as a result of social policy for both organisations and the people that use their services. However, the lack of further discussion of the multiple forms of voluntary advice organisations

available, prompts questions as to the differences in the experiences of austerity and other social issues that may be occurring in differing types of voluntary advice organisations.

Kirwan's (2017a) work is analogous with previous work that investigates voluntary advice. McDermont's (2013) research provides a detailed insight into the provision of advice by volunteers at Citizens Advice organisations. However, this is limited to the specific roles of volunteers within the organisation. The study identified that it is the role of the adviser and therefore the organisation to translate issues from the service users, into the sphere in which they exist, such as social policy, and then translate the solution into understandable terms for the service user (McDermont, 2013). This exploration excludes the voluntary advice work of *Local* organisations as well as the hierarchies that have been identified within voluntary advice organisations (Civil Exchange, 2016), including the paid employees who are also involved in advice giving.

Kirwan's (2017a) study provides an insight into the issues of social policy change for voluntary advice organisations through a comprehensive group of studies. This draws upon a number of methodologies, largely qualitative from a range of academics to address some of the biggest issues that have arisen from the era of austerity, the collection of studies argues that demand for advice services is increasing at Citizens Advice as a result of austerity and the provision of advice is becoming more complex due to the multifaceted issues that service users are now facing. However, the work has a significant limitation in that it is solely concentrated on the provision of advice from Citizens Advice as opposed to other structures such as *Local* that this thesis considers. Whilst the study is limited to qualitative research with *Federal* organisation Citizens Advice, it is also found in the same study that partnerships between organisations are important to fulfil an individual's advice needs (Bowen-Huggett and Kirwan, 2017). Partnerships benefit voluntary advice organisations as these and often mergers can lead to increased access to funding and more importantly an increased provision of programmes with other organisations. Both of these have advantages for service users as they help meet the demand of service users and aid the organisations in navigating the complexity of recent social policy changes, which are crucial

given the increasing lack of volunteers in the current precarious economy. Therefore, it is important to also address *Local* organisations and how they are navigating these issues (see Chapters 5 and 6), for instance how they are working in partnership with other organisations to deal with the issues that arise from social policy reform.

Social policy changes, particularly regarding welfare reform have a significant impact on voluntary advice organisations as these changes are ‘unfairly weighted against the most vulnerable in society’ (Kirwan et al., 2017: 8). Organ and Sigafos (2017) argue that demand is increasing for voluntary organisations that provide an advisory service as many service users find themselves being overlooked by state provision, which can lead to an increase in an individual’s level of complex needs. Francis (2000) argued that Citizens Advice organisations were able to recruit specialist employees to deal with complex cases that may have otherwise been referred to a paid-for service. However, even though the research is now dated and the sector has undergone considerable change, there was a recognition that employees at Citizens Advice ‘have been portrayed as being overworked while struggling with limited resources’ (Citron, 1989 in (Francis, 2000: 67) is still applicable today (Kirwan, 2017a). Subsequent changes to Legal Aid, that provides a great deal of funding for voluntary advice organisations, along with social policy reforms have brought about turbulent times for these organisations within contemporary society, an area that is seldom researched (see, for example: Kirwan, 2017a; Organ and Sigafos, 2017).

Detailed studies of the provision of advice at the organisation Citizens Advice have been carried out and are able to provide valuable understanding and insight into the services offered by voluntary advice organisations to build upon with future research into alternative advice organisations. Holgate et al. (2012) identified that when seeking voluntary advice, ethnic minority workers requiring advice were more likely to access a ‘*Local*’ or ‘community-based’ organisation as opposed to a *Federal* organisation such as Citizens Advice. This is because they could identify with these organisations more clearly on a cultural level as opposed to receiving more general advice from their branch of Citizens Advice. To further this argument, Jones (2010) suggested that alterations to the provision of advice at Citizens Advice may be driving service users away.

The *Federal* organisation have adopted a triage-based service to create greater efficiency across branches nationwide. However, this has also created longer waiting times for individuals who are aware they require specialist advice that is only offered on an appointment basis, with individuals now having to make multiple visits to the advice organisation, providing an understanding of the internal and structural changes that are occurring the organisation.

It remains the case that little knowledge exists of alternative access to advice service users may be experiencing, particularly regarding issues related to social policy reform that are dominating the voluntary advice sector.

2.2 Social Policy Reform

The General Election of 2010 witnessed the formation of a Coalition government between the Conservative and Liberal Democrat parties. One of the priorities of the Coalition was to reduce the budget deficit that had accrued as a result of the global financial crisis in 2008, leading to the Welfare Reform Act 2012 and the period of austerity that ensued. The Welfare Reform Act 2012 was one of the largest legislative overhauls in the past forty years; the Coalition government of the time argued that the ultimate goal of the Welfare Reform Act 2012 was to reduce poverty, welfare dependency and unemployment (Levitas, 2012; Makowiecki, 2015). However, commentators have also argued that this supposed rhetoric is an ideological disguise for neo-liberal welfare retrenchment (Levitas, 2012; Makowiecki, 2015). It was designed in several stages, to decrease government spending on welfare benefits, whilst simultaneously encouraging an increase in employment. Further to this, the Welfare Reform Act 2012 arose to ensure what the government determined to be greater fairness within the benefits system, to those claiming benefits and to the taxpayer, who largely fund the benefits system, ‘while continuing to provide protection for the most vulnerable segments of society’ (Makowiecki, 2015: 247). The main proposal of the Welfare Reform Act 2012 was to introduce a system of new benefits; Universal Credit and Personal Independence Payment being at the forefront of policy attention, along with reform to Housing Benefit including the Spare Room Subsidy, more commonly known as the

‘Bedroom Tax’. It is policies such as these that have resulted in the increase in demand for voluntary advice organisations as claimants navigate through these new systems (Kirwan, 2017a).

There has been considerable research into the effects of austerity and the roll out of social policy reforms as a result of the Welfare Reform Act 2012 and subsequent political decision (see, for example: Levitas, 2012; Alcock and May, 2014; Deeming, 2015; Makowiecki, 2015; Whiteley et al., 2015; Edmiston, 2017). Whilst significant understanding can be gathered from these studies, such as the consequences of these for both the government and the public, there remain broad gaps in the body of knowledge considering the implications of austerity and social policy reform for voluntary advice organisations of any structure.

Austerity in the years following the 2008 global financial crisis can be understood as the Coalition and Conservative government’s justifiable term for their economic and social policy reforms (Levitas, 2012). Government departments such as the Department for Work and Pensions (DWP) place emphasis on the notion of welfare dependency, articulating its role in the economic issues the country is experiencing and the growing complexity of the use of the benefits system,

‘Welfare dependency has become a significant and growing problem in Britain, with huge social and economic cost for both claimants and wider society. The welfare state is now a vast, sprawling bureaucracy that can act to entrench, rather than solve, the problems of poverty and exclusion’ (DWP, 2010: 9)

The concentration of the Coalition and subsequent Conservative governments on the process of policy to strengthen the tendency to find employment and reduce welfare dependency has been disproportionately weighted (Levitas, 2012). There have been cuts that directly impact ‘the poor, the young, the sick and the disabled’ as well as families who may have to relocate due to the ‘Bedroom Tax’ and other policies (Levitas, 2012: 322; Makowiecki, 2015; Edmiston, 2017). With these vulnerable groups identified, there is a further opportunity to explore the organisations that support these groups in dealing with the issues associated with austerity that is often neglected in the literature available, which is carried out in later chapters of this thesis (Chapters

4-6). Levitas (2012) does acknowledge the need for voluntary advice services in her research through the recognition of the cuts to the availability of Legal Aid. However, wider voluntary advice organisations that offer advice outside of the boundaries of Legal Aid are overlooked despite their potential to deal with the issues of austerity that are presented.

2.2.1 Universal Credit, Personal Independence Payment & the ‘Bedroom Tax’

2.2.1.1 Universal Credit

An issue on which people seek voluntary advice is Universal Credit (Harris, 2017; Kirwan, 2017b; Kirwan et al., 2017). Universal Credit combines in-and-out of work support into a single system and monthly payment in order to shadow how wages are managed in the labour force, combining Income Support, Income-Based Jobseeker’s Allowance, Income-Related Employment Support Allowance, Housing Benefit, Child Tax Credit and Working Tax Credit (Dwyer and Wright, 2014). The government argued that this movement would, therefore, encourage ‘personal responsibility, self-motivation and the superiority of market rationality’ (Wiggan, 2012: 384). The consistent rhetoric of ‘worklessness and dependency’ within Coalition documents and general government discourse places blame on the choices of individuals in society and previous government failings (Wiggan, 2012). Larkin (2018), on the other hand, argues that Universal Credit is the Coalition and Conservative vision to transport Britain back to the foundations of the Welfare State. William Beveridge, an advocate for the development of the Welfare State, wrote during an era in which ‘the necessity to sustain oneself through employment was accepted automatically by the majority of the British population’ (Larkin, 2018: 121). It is, arguably, the role of Universal Credit to ensure this is once again the necessity throughout society. Despite this, Universal Credit can have consequences, particularly through distorting the labour market. The concept of Universal Credit allows individuals to enter the labour market and adjusts their payments accordingly, it is through this availability that individuals can be encouraged to enter into part-time and flexible working contracts. These often carry with them lower wages and

greater job insecurity, therefore, the risk of being caught in a cycle of poverty can be heightened throughout society (Millar and Bennett, 2017; Larkin, 2018).

As the Coalition government came into power, the DWP claimed that the benefits system was too complex. Individuals were having to negotiate multiple application processes to access their out-of-work benefits, and thus Universal Credit was introduced (DWP, 2010). However, it is argued that the new system of Universal Credit is becoming even more complex, with recent statistics from Citizens Advice stating the number of issues relating to the benefit continues to increase. In December 2016, the organisation dealt with over 3,000 enquiries which grew to over 5,500 in March 2017, including an increase in decision and appeal issues (Citizens Advice, 2017). These statistics demonstrate the importance of voluntary advice organisations in supporting individuals as they negotiate reforms. However, there remains little knowledge on the provision of advice for these issues or the prevalence of alternative voluntary advice organisations as a *Local* structure, further exploration of this will be seen in Chapters 5 and 6.

Whilst Universal Credit was branded revolutionary and one of the biggest reforms to the welfare system in recent years, it is also argued that there is little that is entirely new under Universal Credit. Larkin (2018) states that it has many similarities to the ‘Speenhamland System’ from the 18th Century that supplemented low wage agricultural workers, later pushed out by the Poor Law Amendment Act of 1834. A similar system was resurrected through Family Income Support and Family Credit in the 1980s, providing recipients with automatic entitlement to means-tested benefits such as NHS prescriptions and free school meals. Uptake of these support systems was low due to the stigma of accessing the benefits system and the claw-back provision that was in place should the claimant take up increased working hours or pay, subsequently leading to a working-poverty trap. New Labour attempted to address this ‘poverty trap’ through the creation of in-work tax relief payments such as the Working Families Tax Credits, aiming to ‘make work pay’ (Atkins, 2010: 411). These policies, as well as others, demonstrate that there have been steps taken to address poverty, social exclusion and the incentive to work in previous social policy reforms.

It is the overall aim of the welfare state to promote and support social cohesion; this was threatened by the financial crisis of 2008, which brought about the alterations to welfare provision under the Coalition and Conservative governments. Taylor-Gooby (2016) argues that the Welfare State in the UK is being driven away from one that promotes social cohesion and towards a system that endorses social division through complex policies ‘favouring supportive groups and directing highlight visible cuts to non-supporters’ (2016: 729). This argument solidifies findings presented in this thesis (see section 7.1.2), that argues the most vulnerable and deprived members of society are drawing upon the services of voluntary advice organisations and increasing the complexity of cases is worsening at these organisations as a result of social policy reform.

2.2.1.2 Personal Independence Payment

Personal Independence Payment was introduced into the welfare policy to replace Disability Living Allowance, which had been the main disability benefit since 1992 (Field and Forsey, 2016; Machin, 2017). The introduction of PIP was brought about to assist the Coalition government’s vision to drive down the cost of disability payments in the UK, with the government seeking to cut these payments by 20 percent (Henry, 2014). Additionally, it is argued that the movement to PIP was in part, due to a ‘change in perspective on who should qualify for working age disability benefits’ (Machin, 2017: 437). The policy is in keeping with the austerity measures imposed by the Coalition and Conservative governments as they sought to reduce public spending. However, it also isolates those individuals who no longer qualify for PIP after being a long-term claimant of DLA given the shift in criteria (Field and Forsey, 2016; Machin, 2017). It is in these cases that individuals are at risk of becoming increasingly vulnerable, seeking advice and support from voluntary organisations as they navigate social policy change. This is supported by statistics provided by Citizens Advice stating that enquiries have continued to rise since the introduction of the rollout period for the policy since 2013. In December 2013, the organisation dealt with 23,212 PIP enquiries on a nationwide basis, this increased to 38,527 in November 2017 and peaked during this time period with 41,458 enquiries in November 2016 (Citizens Advice, 2017).

Makowiecki (2015) argues that the lengthy roll-out procedure that has occurred with PIP has increased the level of complexity and confusion of the system as a whole.

The purpose of the move to PIP was to streamline disability benefits, which would ultimately result in a less complex system overall. However, an independent review concluded that this had not been the case, with individuals navigating a more complex system than DLA (Machin, 2017). During the transition from DLA to PIP, individuals must re-apply for the disability benefit rather than being automatically transferred onto it, which includes a complex medical assessment that can be applied for between 1 and 10 years, as opposed to a lifetime claim as before (Field and Forsey, 2016; Organ and Sigafos, 2017). This medical assessment involves the questioning of whether the individual is able to 'participate fully in society' rather than the severity and impact of their impairment on their daily lives (Field and Forsey, 2016: 94). On a national basis, the rollout of PIP was recommended to include an improvement to the claimant experience, improvements to the collection of further evidence and assurance of the fairness and consistency of assessments. These recommendations derive from a number of arguments, a significant one is 'the claimant journey', which can often be disjointed due to severe delays for decisions and the lack of communication between the number of different organisations involved in the claim process (Gray, 2017; Machin, 2017). It is argued by Organ and Sigafos (2017) that the move from DLA to PIP has 'created one of the biggest specific impacts of the WRA [Welfare Reform Act] on the need for legal advice in Liverpool' (2017: 163). It is these issues and changes to the welfare system that are affecting the voluntary advice sector; their operations and service users. These issues have been discovered on a local basis and can be applied to the fieldwork site of this research, Liverpool.

2.2.1.3 The 'Bedroom Tax'

A further issue for advice organisations in recent years has been the Removal of the Spare Room Subsidy, more commonly known as the 'Bedroom Tax' (Kirwan, 2017a). The vision of 'Bedroom Tax' as a policy was to reduce the expenditure of housing benefit for social tenants who were

deemed to be in under-occupation of their property, in line with the Coalition's long-term austerity goals. The policy aimed to incentivise these households to occupy a property of the 'appropriate' size or face financial penalties for not doing so (Gibb, 2015; Field and Forsey, 2016). The penalty for under-occupying a socially rented property reduced Housing Benefit by 14 percent for the under-occupation of one room and 25 percent for more than one room (Gibb, 2015). The uncertainty and upheaval surrounding the 'Bedroom Tax' has significantly affected service users of voluntary advice organisations. Interviews with service users and volunteers at Citizens Advice organisations from Kirwan's (2017a) project stated that social policy reforms such as this, had created unescapable household debt and a growing complexity of caseloads for volunteers.

Whilst the aim of the 'Bedroom Tax' was to reduce expenditure on housing benefit, the policy was over £100 million short of its saving targets of £480 million in 2013-2014 (Field and Forsey, 2016). This prompts further questions of how households were dealing with issues related to the 'Bedroom Tax'. As mentioned by Kirwan (2017a) issues can manifest themselves as debt, or relocation that can only be brought into practice 'if there are enough suitable homes to which people can downsize. Without such an option, claimants have been left between a rock and a hard place' (Field and Forsey, 2016: 57).

2.2.1.4 Sanctions

The Coalition government introduced what has been argued as the 'harshest regime of conditionality and benefit sanctions in the history of the UK benefits system' (Reeve, 2017: 65). Aimed at promoting behavioural change around benefits and to further incentivise entrance to the workplace, significant sanctions were placed on JobSeekers Allowance and other benefits (van Kersbergen et al., 2014; Reeve, 2017). Sanctions following the introduction of the Welfare Reform Act 2012 are understood to be the reductions in benefits paid following a compliance 'failure' by the claimant (HM Government, 2012).

Benefit sanctions are not limited to the work of the Coalition and Conservative governments of recent years. The Conservative government under Thatcher introduced a ‘Restart’ initiative in which the provision of sanctions was in the hands of Job Centre staff who worked with individuals who had been unemployed for a year or more. If the individual refused to take part in this activity sanctions could be placed on their claims. Furthermore, as New Labour came to power, they did not further endorse this sanction activity for Job Centre staff, but it remained in place. New Labour did, however, widen their markers for conditionality to new claimant groups, significantly increasing the number of individuals that could be in receipt of benefit sanctions (Field and Forsey, 2016). Field and Forsey (2016) and Reeve (2017) both suggest that the current system has the possibility to punish claimants, pushing them out of the system that was designed to protect them. The sanctions regime with its elongated fixed periods and stringent conditions that must be met can arguably have become ‘too rigid, too complex, too harsh, and is applied under conditions that appear to be unfavourable to claimants’ (Field and Forsey, 2016: 38).

Issues around these sanctions can be argued to be particularly focussed on the most deprived populations and households, creating a more inequitable society (Reeve, 2017). These claims are supported by the audit carried out by Field and Forsey (2016), elucidating that the most vulnerable populations are being targeted by sanctions and increased conditionality. It was found that there were 861,055 cases that received one sanction, 188,119 cases that received two sanctions and 121,089 cases that received three or more sanctions between 2012 and 2015 (Field and Forsey, 2016: 39). Whilst consistency in data is unclear, it is clear to see that there have been a great number of benefit sanctions applied to claimants in recent years. Citizens Advice, one of the many voluntary organisations who provide advice and support for individuals who have been sanctioned define the sanctioning regime as ‘if you haven’t done one of the activities in your claimant commitment, you may be sanctioned. This means your Universal Credit payments will be temporarily reduced’ (Citizens Advice, 2018c).

Universal Credit was arguably the flagship policy in the Coalition’s social policy reform ideals, and the Welfare Reform Act 2012 (Larkin, 2018). The policy is also one of the most in-demand

issues being dealt with my voluntary advice organisations in recent years (Kirwan, 2017a; Organ and Sigafos, 2017). Although financial incentives are one of the main drivers of Universal Credit, the pioneering policy aimed to improve welfare to work, tough sanctions are in place to deter non-compliance with the programme. In the early days of Universal Credit introduction and rollout, it was unclear what was meant by sanctions, with little clarity being made by the government on the forces it would use to deal with non-compliance of its 'Claimant Commitment' (Pennycook and Whittaker, 2012). Once Universal Credit had been rolled out in a particular area, all claimants are required to sign a 'Claimant Commitment'. Whilst this is not dissimilar to agreements in previous benefit claims, it requires claimants to detail the work-related actions they will take, and provides them with information on the sanctions that will be applied should they discontinue the commitment (Dwyer and Wright, 2014).

Millar and Bennett (2017) argue that these intense sanctions that have been introduced through Universal Credit are more stringent than those that an individual may face in the workplace, this is as the highest sanction could result in a complete loss of benefits for up to three years. Sanctions that affect benefit claimants are largely associated with the 'welfare dependency' that the Coalition and Conservative governments are attempting to move away from, more sanctions are therefore being given for work-related failures (Taylor-Gooby and Taylor, 2015). There are four levels of sanctions that can be brought in through Universal Credit (lowest, low, medium, high). The lowest can only be applied until the claimant complies and is used for example for a failure to attend a work-based interview. The medium level sanction is used when somebody has not 'taken all reasonable action to get work' and can be applied for 28 to 91 days (Dwyer and Wright, 2014: 32). The highest level of sanction, which is used for the failure to apply for a job is applied for a minimum of 91 days but can increase to 182 days for a second failure and 1095 days for a third. Additionally, fines are also in place alongside these sanctions with claimants being fined for making incorrect statements or benefit fraud (Dwyer and Wright, 2014).

Benefit claimants have not all been rolled onto Universal Credit at the same time as it has been rolled out in staggered intervals across the country, adding to the level of complexity and

unevenness throughout society (Makowiecki, 2015). This growing complexity of understanding the ever-changing benefits system, re-testing and moving eligibility criteria is evidence that supports Kirwan's (2017a) claim that voluntary advice organisations such as Citizens Advice are dealing with increased demand due to overall social policy change despite a focus on the sanctions regarding JobSeekers Allowance and Universal Credit (see, for example: Pennycook and Whittaker, 2012; Dwyer and Wright, 2014; Millar and Bennett, 2017).

Research on the provision of voluntary advice and sanctions is limited, although it is recognised that a tougher regime of sanctions does call for increased advice services (Field and Forsey, 2016). The extent of these sanctions and how this influences the need for advice and advisory services remains under-discussed, although the prevalence and need for this discussion has been highlighted in both academic and grey literature (Wintour, 2014; Field and Forsey, 2016; Kirwan, 2017a). Kirwan (2017a) states that benefit sanctions, including JobSeekers Allowance and other benefits, have disproportionately affected the most vulnerable in society, including the service users of Citizens Advice which is the main focus of the study. Not only are service users being locked out of benefits services due to the increase in digitisation of the benefits system (Clarke, 2017; Harris, 2017), but the extent and breath of advice that is now required from voluntary advice organisations such as employment and benefits is now more substantial than ever and accompanied with barriers to accessing any other forms of advice, such as those provided by tribunals and solicitors. Organ and Sigafoos (2017) have associated benefit sanctions with unmet need for advice, stating that individuals in Liverpool, the fieldwork site for this thesis, are becoming less likely to challenge sanctions and find advice to help them do so. Despite this, there is still a growing need for advice in Liverpool and on a national scale (Kirwan, 2017a; Organ and Sigafoos, 2017). Further work on the provision of advice for sanctions, and how volunteers and their wider organisations are experiencing these social policy changes is imperative and addressed throughout this thesis.

2.3 The Voluntary Sector in the England

2.3.1 The Contemporary Voluntary Sector

In order to understand the voluntary advice organisations involved in this research, it is important to gather a picture of the voluntary sector as a whole particularly given the current precarious social and political economy. Voluntary and community organisations, charities and social enterprises each have their structural differences but are viewed together as making up one sector, albeit without a solid definition (Macmillan, 2015). Defining the sector is fluid, with it being termed the voluntary sector (Buckingham, 2009), third sector (Macmillan, 2015), civil society or more recently by the government, voluntary and community sector (Alcock et al., 2012), amongst others on a global scale. The definition of the sector is therefore ever-changing, as is the sector's relationship with the state. It is argued that the voluntary sector and the state exist alongside one another with interdependent relationships, meaning government decisions have a significant impact on the sector as a whole (Macmillan, 2015). Despite this, the voluntary sector has maintained a 'cherished independence' from the state throughout multiple governments and their subsequent decision-making (Macmillan, 2015: 104). For voluntary advice organisations, this independence is particularly important as they navigate through government decisions and relate these back to service users with impartiality (McDermont, 2013), further discussed in relation to *Local* organisations in sections 5.5.4 and 6.5.3. It is therefore important to recognise the turbulent atmosphere of the sector and the difficulty in defining voluntary organisations and the sector as a whole. This thesis concentrates on organisational type, it is not attempting a generalisation of the difficulties in defining the sector but will develop an understanding of the role of voluntary advice organisations in wider voluntary sector research.

Identity and independence can also differ between organisational size and structure, a key feature of this thesis and consideration of the sector in general. Aiken and Harris (2017) discuss the abilities of recent social policies to 'erode the distinctive features of the third sector' (2017: 333). The authors conducted a sector-wide policy review, arguing that public policy has encouraged

small and medium-sized organisations to adapt their provisions to ones that are more mainstream, such as welfare services, as opposed to the local or community concentration that is often associated with these organisations. Rhodes (1994) described a concept whereby referring to the distinguished functions of the state that had been eroded with a loss of roles for central and local government in favour of a mixed economy of services provided alongside the private and voluntary sectors, terming this as ‘hollowing-out’. Aiken and Harris (2017) sought to explore whether this concept could be able to voluntary organisations. In particular whether the core features of small and medium-sized voluntary organisations are being eroded to meet the needs of policies such as the ‘Shared Society’. They argue that these policy pressures are leading to small and medium-sized organisations shifting their focus from local and community needs towards more mainstream government contracts that may not be focussed on local needs and can result in a loss of local knowledge.

There is, therefore, scope to extend this work through carrying out empirical research with multiple organisations, and assess how voluntary advice organisations, who advise on and are influenced by public policy experience such changes and pressures. Findings produced by Macmillan (2015) argue that differences between organisations and sectors as a whole exist, although they are often assumed to be homogenous and therefore grouped together. Research is vast on organisations who have a ‘relatively stable identity’, their behaviour can be ‘more easily grasped than the amorphous, fluid and ephemeral kinds of informal voluntary or civic action’ that can still be out of reach for researchers (Macmillan, 2015: 104). This prompts questions regarding the heavy focus on Citizens Advice in voluntary sector research (see, for example: Abbott, 1998; 2007; Galvin et al., 2011; Holgate et al., 2012; Lee, 2014; Kirwan, 2017a), opening up the space for further research on *Local* organisations and the comparisons that can be drawn between these and those of a *Federal* structure (see Chapter 7).

Public policy can be a strong determinant for the well-being of the sector, the availability of resources and services offered within the voluntary sector, as well as its relationships with the state and wider society. Prime Minister Theresa May in 2017 stated an expectation for the

voluntary sector to participate in the implementation of the 'Shared Society' (May, 2017). The 'Shared Society' is the premise that 'networks of families, communities and citizens will care for one another and in which both government and the third sector will play a part in tackling social issues' (Aiken and Harris, 2017: 333). The policy witnesses the government's claim to move away from laissez-faire liberalism that has been favoured during the austere years and towards a government that is willing to encourage the work of the voluntary sector (Civil Exchange, 2017). The 'Shared Society' resembles the now-defunct policy of the 'Big Society'. The May administration furthered the 'Big Society' by seeking to place the 'unheard voices' of voluntary organisations at the core of the policy and work alongside these organisations on social issues (Civil Exchange, 2017: 21).

With the policy climate that has accompanied both of these agendas; they have failed to gain momentum, with the emphasis being placed on the power of speeches rather than action for voluntary organisations. This is supported by work of Aiken and Harris (2017), as they question the changing policy environment on small and medium-sized voluntary organisations, and their capacity to meet the expectations of policies such as the 'Shared Society'. The policy seeks for citizens of the UK to support each other on a community level, voluntary organisations that are small and medium-sized, therefore, become central to this idea. However, it is subsequently argued that these organisations are being 'organisationally eroded' due to funding, regulation and the overall policy environment and therefore have a limited capacity to meet the needs of the 'Shared Society' (Aiken and Harris, 2017: 338). This can be applied to the current climate in which voluntary advice organisations are operating in. Not only do they have a limited capacity to meet the needs of the 'Shared Society' but the cases they are dealing with are becoming more complex and the resources required to handle these cases such as funding, volunteers and space are becoming more restricted (Kirwan et al., 2017; McDermont, 2017).

2.3.2 How Did We Get Here? A New Labour & ‘Big Society’

History

This thesis concentrates on the social policy reforms following the Welfare Reform Act 2012. In order to fully understand the current climate, the political movements of the New Labour administration and the relationship between the voluntary sector and the government during this time must be discussed. This is because the emphasis on partnership and the voluntary sector delivering public services was introduced during this time period. This emphasis largely remains in place today, although given the recent lack of support for the voluntary sector this is becoming increasingly difficult.

New Labour’s goal for the voluntary sector was to increase the level of partnership between the state and the voluntary sector, which was brought about through the ‘Compact on Relations between Government and the Voluntary and Community Sector in England’ (Home Office, 1998). The Compact was developed as a recommendation from the Deakin Commission (1996), a relationship between the two sectors was established and officially agreed upon (Lewis, 2005). The Deakin Commission (1996) was an independent inquiry to review the challenges that could be faced by the sector at the turn of the century. The Deakin Report (1996) highlighted the improvement of relations between the state and the voluntary sector, emphasising the importance of the role of voluntary organisations within society, particularly for the provision of social care and education (Lewis, 1999). However, it is argued that the Deakin Commission ‘played a critical role in the development of a new discourse on the need for a formal and structural review of state and voluntary sector relations in the mid-1990s, which the new government in 1997 proved able and willing to take up’ (Alcock, 2010b: 5). The Compact provided a framework for the expectations and roles of each of the sectors, positioning the voluntary sector within public policy, ultimately creating horizontal support (Kendall, 2000). One of its main aspects was that of partnership, although this had already been a key principle of the voluntary sector. On the side of the government, it was agreed that better attention would be paid to funding, consultation and

working relations. Whereas, for the voluntary sector the emphasis was placed on the continuation of high standards in funding and accountability, open communication between members, service users and support of organisations, and the overall promotion of good practice (Lewis, 2005).

An increase in funding was experienced during the New Labour years, although this, along with the delivery of statutory contracts was disproportionately distributed. Under a quarter of voluntary organisations were in receipt of major government funding, yet it is those organisations who are of a '*Local*' structure or community based that are more heavily reliant on public funding (Davies, 2011). This creates fundamental issues for the resilience of these organisations, particularly when considered during the era of austerity that immediately followed the New Labour administration. The ability for voluntary sector organisations to be able to adapt to changing policy climates has been called for by successive governments, most notably from the New Labour era, inevitably leading towards the transformation of the sector to 'generate stronger and more resilient' organisations (Macmillan, 2015: 106). The importance of the relationship between the government and voluntary sector, as stressed by the Compact became increasingly important ahead of the 2010 general election in the midst of the 2008 global financial crisis. This has since been recognised as an important time for voluntary advice organisations, as they deal with many issues that society was contending with as a result of the crisis and the subsequent austerity measures that have been introduced (Kirwan, 2017a).

A turn to communitarian politics was introduced following the formation of the Coalition government in 2010 (Pattie and Johnston, 2011; Milbourne and Cushman, 2013). It sought to engage and promote greater initiative for individuals to become involved in their communities, corresponding to the overall British political sphere over the last two decades (Alcock et al., 2012; Donoghue, 2013). Most recently, this has been visible through the Coalition government's 'Big Society' agenda (Alcock et al., 2012; Corbett and Walker, 2012; 2013; Macmillan, 2013a). Although this term has largely disappeared from policy debates, the emphasis on active citizens helping each other in the light of reduced state provisions is continuing through the 'Shared Society' (Aiken and Harris, 2017; Civil Exchange, 2017). Yet, this continues to leave a vacuum

of knowledge regarding the continuation of organisations that operate on a community basis, with little evidence of how they will be able to ‘practically fund, organise, run and maintain services with substantial public funding has been removed’ (Corbett and Walker, 2012: 490).

The ‘Big Society’ sought to deliver ‘bottom-up citizen initiatives’ as opposed to the top-down era of government control that the Coalition argued had been occurring during the New Labour years (Alcock et al., 2012: 356). This was designed to place the voluntary sector at the core of public sector reform, handing power to local communities. However, the ‘Big Society’ agenda also came with drastic budget and policy changes. Despite these significant changes that would inevitably alter the outlook of the sector, the Coalition government stated that the ‘Big Society’ was not a facade for increased austerity measures, although it has been argued that was not the case (Alcock et al., 2012; Corbett and Walker, 2012). Despite the concentration on the ‘Big Society’ from the Coalition government, policies that were favoured by the New Labour administration and promote communitarianism have been diminished. The growth of the voluntary sector under New Labour was also aided by the willingness shown by voluntary organisations to take part in capacity building, collaboration and mergers to undertake and deliver large-scale service delivery contracts (Milbourne and Cushman, 2015). It can, therefore, be argued that the voluntary sector and voluntary advice organisations remain in contention with little support and high expectations as they navigate increasing policy tensions and fast-paced societal change.

Milbourne and Cushman (2015) recognise some distinction between organisations within the voluntary sector. They argue that large-sized charities are in the best position regarding social policy change. Smaller organisations than these such as the organisations involved in this thesis can remain out of view for political discourse. This is arguably due to the halting of funding for the voluntary sector as a result of Coalition policy, with public sector contracts moving to corporate partners over voluntary organisations. This is in contrast to the New Labour era, between 2001 and 2008 income rose from £29.6 billion to £42.1 billion. This has stagnated since 2007 to 2008 as the financial crisis has taken hold with income remaining at around £40 billion (Chapman, 2017). This thesis explores the concept of change further (sections 4.6.1, 5.6.2 and

6.6.1), with voluntary advice organisations advising on issues that are related to these fluctuations and further austerity measures as well as experiencing their own funding cuts.

Although the 'Big Society' was framed as a bottom-up initiative, it can be argued that in fact, this did not occur and instead top-down enforcement oppressed community empowerment which has not been left to flourish and act on its own aims and mission (Milbourne and Cushman, 2015). Despite this toughened climate, it has been observed that voluntary organisations largely display great resilience to these changes, including the decreased in the availability of income from government contracts (Chapman, 2017).

New Labour and subsequently the Coalition and Conservative governments through their conception of the 'Big Society' have been driving towards creating a more cohesive society in which communities are brought together through policy and action (Donoghue, 2013). Whilst the 'Big Society' was a driver for increasing involvement in communities and voluntary action and therefore promote positive social change, the opposite effect occurred with 'Big Society' concepts being used to disguise divisive ideological and political action (Jacobs and Manzi, 2012). This notion has been furthered on a number of levels. Firstly, Macleavy (2011) found that certain social groups in the UK, including women or those that are in severe poverty that are overlooked by such reforms. Not only are these groups some of the most vulnerable to 'new social risks' but they also conduct much of the work in the voluntary sector (Macleavy, 2011: 355). Therefore, the growth of the voluntary sector that was envisioned through the 'Big Society' could have created harm on the growth of the sector through the inequitable policies that were associated with the concept. Secondly, welfare reforms, introduced with the austerity plan to reduce public spending and 'make work pay' were a national strategy, although one that has 'local consequences' some of which are more significant for particular areas than others (Beatty and Fothergill, 2014: 64; 2016). Liverpool was found to be one of the worst affected areas by welfare reforms, as an 'older industrial area', along with other locations such as Stoke-on-Trent and Sunderland (Beatty and Fothergill, 2014). Therefore, concepts such as the 'Big Society' are flawed as the uptake for voluntary action will be disproportionately located due to unequal

sections of the country as a result of these disparities and the effects of poverty that they bring about (Pattie and Johnston, 2011; Beatty and Fothergill, 2014).

2.3.3 Change and Resilience for the Voluntary Sector

2.3.3.1 The Drivers of Change

Emerging from Kellock-Hay et al.'s (2001) research is the application of the business and human resource disciplines on the understandings of the voluntary sector, in particular change and how this is managed. Their work highlights the important changes to the voluntary sector in recent decades and opens the door for organisational importance in the voluntary sector. The group highlighted the increasing role of the voluntary sector in society, and the 'unique sectoral characteristics that can complicate the management process', such as organisational values, vague objectives or resource scarcity, suggesting that change in the voluntary sector can therefore be complex (Kellock Hay et al., 2001: 241). The analysis of the research revealed three key drivers of change for the voluntary sector; political forces, access to funding and the evolving architecture of the voluntary sector, which refers to the role of voluntary organisations in society at a given time, often fluctuating depending on the relationship between the sector and the state or wider social issues. The study, whilst highlighting the importance of organisational change and development in the voluntary sector was carried out as a case study with councils for voluntary services in Scotland. This can be applied to this research but a further exploration into the phenomenon is required on both an English platform and for the complex voluntary advice organisations that exist.

These three drivers of change, political forces, funding and the evolving architecture of the voluntary sector, are crucial in understanding recent changes that are occurring in the voluntary sector. They specifically conceptualise change and how it affects voluntary organisations, one often influencing each of the other changes. This is supported by the work of Aiken and Harris (2017) who argue that within the New Labour years of 1997 to 2010, political forces brought voluntary sector organisations to the forefront of the social policy agenda, as both partners of and

providers for the state. The relationship developed between the voluntary sector and the state during this time has been described as ‘strategic unity’ (Alcock, 2010a). The voluntary sector was able to formally engage with the government, utilising the support and services that were being offered, largely due to the ‘hyperactive’ policy environment that was occurring during the time period (Alcock, 2010a; Alcock et al., 2012). With this engagement, however, comes expectation. Voluntary organisations were expected to play a heightened role in the delivery of public services as agreed in the Compact. These expectations were further highlighted at the point of the global financial crisis in 2008 with the uncertain economic and political climate, ‘the recession would deleteriously impact on the sector, leading to a loss of funding and greater demands on some organisations’ (Alcock et al., 2012: 348). In the post-2010 society following the formation of the Coalition government, political forces have brought about an intensified marketization of public services, with for-profit business utilising the services of an increasing number of small and medium-sized voluntary organisations due to their ability and resources to win bids. However, along with these political changes other drivers of change, the architecture of the sector and funding have also created unequal experiences for small and medium-sized voluntary organisations. It has been found that between 2008 and 2014 small and medium-sized voluntary organisations suffered more income fluctuations and lost more income proportionally than larger charities (Aiken and Harris, 2017). It is therefore clear that political forces can influence not only social policy reform, but also the funding trends and evolving architecture of the voluntary sector.

The concentration on funding and income fluctuation in recent years has led to a discussion on the changing atmosphere of funding for the voluntary sector (Aiken and Harris, 2017; Chapman, 2017). It is argued that an organisation that focuses primarily on the financial outlook and income generation rather than their goals and values will find that their own sustainability and resilience will be detrimentally impacted (Chapman, 2017). From a mixed-method, longitudinal study Chapman (2017) surmised that organisations that do lack clarity on their goals and values often struggle to continue providing the services for which it has concentrated on. They subsequently suffer from mission drift, whereby organisations lose focus of their founding values and mission

to the detriment of the service user. On the other hand, 'well-governed' or what the author also refers to as 'stronger' organisations have the ability to make informed decisions and decide between income that could help them achieve their mission and funding opportunities that potentially cause damage, will be more sustainable and resilient to change in the future (Chapman, 2017: 5).

Aiken and Harris (2017) argue that government funders and charitable trusts often prefer voluntary sector organisations to be self-sustainable which is also coupled with the mainstreaming of income and services. Due to this mainstreaming over local focus, small and medium-sized organisations have been found to withdraw their focus from local needs and put focus on an increased number of projects to attract government funding. It is therefore argued that 'survival may well be at the cost of losing local and specialist knowledge, credibility and support' (Aiken and Harris, 2017: 338). Despite this finding, the authors also argue that larger organisations with more financial bargaining power have the ability to dominate bids for public sector contracts and funding, it is actually the more community-based or '*Local*' organisations that support their communities that are losing out. Some of these organisations have managed the political environment of change well as they have the ability to reconstruct their approach, but many are struggling. Questions regarding the ability of voluntary advice organisations to respond to this changing environment remain. Specifically, the research presented in Chapters 4 to 6 of this thesis considers how both *Federal* and *Local* advice organisations experience change.

The final driver of change, the evolving architecture of the voluntary sector draws all of the drivers together. This is because the environment in which an organisation exists can also influence their funding and reaction to political forces (Kellock Hay et al., 2001) (further elaborated in section 7.3.2). The term refers to the position, understanding and role of organisations in society and how this evolves and fluctuates across time-periods or with significant social change. The most recent of these has been the introduction and demise of the 'Big Society'. Voluntary organisations were presented with the opportunity for more responsibility in voluntary action, but the initiative did not deliver. This left the sector with greater

demand, dwindling funding and resources, along with uncertainty about their future role in society and relationship with the state (Pattie and Johnston, 2011; Milbourne and Cushman, 2015).

2.3.3.2 Organisational Change and its Implications

Theoretical discussions have populated the sociological assumptions of organisational change, particularly those from Meyer and Rowan (1977) and DiMaggio and Powell (1983). Meyer and Rowan (1977) articulate that institutional environments lead to homogeneity between the organisations that exist within them, rationalising the structures, activities and vocabulary of such organisations. DiMaggio and Powell (1983) furthered this theory arguing that organisational fields exist and behave in ways that encourage organisational change to occur creating homogeneity across the field. These organisational fields are recognisable areas or aspects of institutional life such as agencies, suppliers or organisations that provide similar services or products. This process, known as isomorphism, occurs through three powerful forces and leads to the structure, practice, goals and performance or efficiency of organisations becoming increasingly similar. The first mechanism through which this process of organisational change can be identified is coercive isomorphism. This is the increasing pressures that are put on organisations in a field by other organisations that they are dependent on or by societal expectations of the behaviour of the field. The second mechanism is described as the mimetic pressures in which uncertain environments create and encourage imitation of other 'model' organisations in the field. This mirroring pressure can often occur as organisations model themselves on other organisations that they deem to be successful. The third mechanism is understood as normative pressures, through which professionalisation of the field occurs. This becomes relevant for isomorphism as although individuals differ from one to another, the crowding of professionals that do not transfer between organisational fields creates both coercive and mimetic pressures within organisations themselves. Therefore, it is troublesome for individuals to define the conditions and methods of these professionals and their work to promote autonomy (DiMaggio and Powell, 1983).

According to Meyer and Rowan (1977), institutional isomorphism can promote success and survival for organisations. As organisational forms emerge, it is argued that fields are diverse, but it is when these organisational fields become populated that homogenisation through these mechanisms of isomorphism occur, creating similarly successful organisations (DiMaggio and Powell, 1983). Whilst this is true for many organisational fields, Knight's (1993) typology of voluntary organisations highlights the multifaceted structures of organisations that make up fields, many of which share similar structures, activities, beneficiaries and functions. Whilst some aspects of voluntary sector definitions contradict isomorphism theories, applied studies on voluntary sector advice by Organ and Sigafos (2017) exhibit some aspects of isomorphism. The authors found that advice agencies in Liverpool have begun to similarly focus on the lack of specialist skills available at organisations following unprecedented cuts to Legal Aid. As a result of government decisions, or coercive isomorphism, there is a growing phenomenon of telephone-based advice, signposting to online services, provisions focussed on self-help and mergers of organisations. This demonstrates that isomorphism is occurring for voluntary advice organisations, especially within an environment of austerity and Legal Aid cuts.

Further discussions of organisational change, development and growth have been carried out and can aid the understanding of the importance of change for voluntary advice organisations (see, for example: Bedeian, 1980; Sallis and Sallis, 1990; By, 2005; Chapman, 2017). It is argued that the growth of organisations rarely occurs by chance, more often being orchestrated by managerial decisions and the actions that follow them (Bedeian, 1980). With this in mind, change for organisations is therefore driven by collective action and goal accomplishment. In order to adhere to their values and provide advantages for the organisation as a whole, change becomes a universal and continual concept for all organisations 'regardless of its structural characteristics, no organisation is exempt from change' (Bedeian, 1980: 293). Organisational change is unpredictable and reactive, particularly given technological advances and movements in social trends. Organisations must be able to manage change proactively in order to be resilient to future reforms and advancements (By, 2005).

Sallis and Sallis (1990) identify that change can be complex for organisations, with different forms of change occurring, therefore organisations operate in a constant state of fluctuation, supporting the arguments presented by Bedeian (1980). Sallis and Sallis (1990) identify that different forms of change include reactive change or more commonly known as crisis management, which occurs when an organisation must react to external or internal pressures. Proactive change on the other hand, is planned and organised change, working to meet the objectives of the organisation through the reformation of policies and procedures, again furthering the work of Bedeian (1980). It is argued that as a whole, organisations often do not respond well to change, this is because many developmental plans are constructed with the future being perceived as the present (Sallis and Sallis, 1990). Chapman (2017) agrees with this argument, stating that voluntary organisations are largely optimistic about future change, expecting that their income will remain the same or even rise. This outlook can differ between organisations, with ‘well-governed’ organisations being able to distinguish between good and bad opportunities whereas weaker organisations have a less realistic view of the future as they concentrate on financial issues only. Chapman (2017) concludes by elucidating that organisations must concentrate less on financial change and more on how the change will affect the organisation as a whole and how the change alters or fits in with their mission, values and plans for development. Furthermore, the experience of change is not only different *between* organisational types, but also *within* organisations with Bedeian (1980) noting that change can occur in the first instance at management level. Therefore, an exploration into how the experiences of change differ amongst hierarchies within voluntary advice organisations is necessary. The arguments presented about organisations as a whole demonstrate the importance of understanding change and the experiences of this within alternative organisations such as voluntary advice organisations as this thesis demonstrates, with change being experienced differently by volunteers due to their relationship to service users (as explored in section 7.1.1).

2.3.3.3 Organisational Change in the Voluntary Sector

Organisational change is an important but often overlooked concept in the voluntary sector, given the turbulent environment in which it sits and the effects this can have on operations, volunteers and the sector as a whole. Although there are a number of contributors to this body of knowledge (see, for example: Wilson, 1996; Kellock Hay et al., 2001; Billis, 2010; Dayson, 2011), one of the key players for this thesis is Dayson (2011). His empirical research on organisational development and change in the voluntary sector revealed, similarly to Sallis and Sallis (1990), that two forms of organisational challenges or changes can occur; external and internal. These are applied to the personalisation agenda in Dayson's (2011) research, which concentrates on the way in which services are provided by organisations to meet the needs of service users. These changes can also be applied more broadly to voluntary organisations that deal with the processes of the welfare state and its implications for wider society. External challenges are described as 'barriers over which organisations had very little control' can often derive from decisions made by local authorities and therefore organisations are locked out of information on future resources and policies (Dayson, 2011: 101). Internal challenges, on the other hand, are the changes that an organisation makes in order to meet the needs of new agendas, or the needs of service users. These changes largely manifest as funding, marketing and resource alterations (Dayson, 2011). It is changes such as these that have led to the adoption of private sector managerial practices, which are arguably more entrepreneurial and strategic in the search and fight for resilience in precarious economic and social contexts (Wilson, 1996).

Whilst Dayson (2011) articulates how change is understood within voluntary organisations and their moving agenda to meet the needs of service users, Billis and Glennerster (1998) discuss how service users can implement organisational change and development. The authors use a theoretical review to identify four disadvantaged populations that draw upon the services of the voluntary sector and ultimately influence organisational construction and development. First, individuals who are financially disadvantaged utilise the services of the voluntary sector to provide autonomous and free services that may not be available in the private market. This thesis

further their argument as it demonstrates how disadvantaged service users engage with advice services and the ways in which voluntary advice organisations change and develop as a result of this.

Second, a personal disadvantage may occur for service users; these individuals may not be able to articulate preferences between organisations, for instance, people with learning or mental health problems, the very young or the very old. Third, societal disadvantage refers to individuals who may be stigmatised and therefore have lost their voice in society. These individuals require organisations who can act autonomously on their behalf. Finally, community disadvantage occurs when individuals reside in areas that are deprived or where employment structures have broken down. This sends individuals towards voluntary services as there are limited private sector organisations and political interest has dwindled in the area (Billis and Glennerster, 1998). Using this framework, it is clear to see that whilst voluntary organisations may not have strong advantages for those who are financially disadvantaged due to weak and lacking resources, they have very strong advantages for personal, societal and community disadvantage compared to the private and public sectors. This is of particular importance for *Local* voluntary organisations to whom the needs of that particular community are paramount to overcome deprivation and encourage community development (further explored in section 6.5.1).

Wider literature demonstrates that for voluntary organisations change and development is complex and can be implemented from a number of avenues, from local and central government, at an organisational level and from service users themselves (Bedeian, 1980; Sallis and Sallis, 1990; Billis and Glennerster, 1998; Dayson, 2011). However, this thesis provides further empirical evidence of the process of change for voluntary advice organisations. This is particularly important it highlights the impact of political reforms such as alterations to social policy and how they affect change within voluntary advice organisations. Social policy changes can be a large determinant of the advice provided at voluntary organisations (statistics are provided in section 2.2.1.1), but the research presented here highlights the influence that

community and services users can have over organisational change and how it is experienced within the organisation (discussed further in section 7.2).

2.4 Communities and the Unequal Distribution of Voluntary Services and Social Policy Reforms

The significance of understanding *Local* voluntary action has already been laid out in this chapter, with discussions from Alcock et al. (2012), Corbett and Walker (2012), Macmillan (2013a), Milbourne and Cushman (2013) and Aiken and Harris (2017). The relationship between communities, welfare, sanctions and voluntary services will be further explored below.

Community has been defined by Delanty (2003) as the collection of small groups, such as neighbourhoods. A community is understood as a place of safety and comfort in which individuals can use the community to deal with the issues arising from the state and other forces of power in times of unease and precariousness (Delanty, 2003). This concept of belonging and shared experience is crucial in understanding the role of voluntary advice organisations in society and their relationships with service users as these relationships can determine the provision of advice and navigate social policy reform (as highlighted in sections 7.2 and 8.2).

The concept of community has been at the forefront of the political and social policy agenda through the New Labour (DCLG, 2006), the Coalition and now Conservative years (Mohan, 2010; Wilks-Heeg, 2011; Hancock et al., 2012; Beatty and Fothergill, 2014; 2016). The Coalition placed the community at the forefront of their policies through the ‘Big Society’ as previously discussed in section 2.3.2. Whilst the ‘Big Society’ agenda has now become extinct from political agenda, the policy highlighted important considerations to be made between communities, social policy and the voluntary sector. The ‘Big Society’ was formulated in order to address a phenomenon termed ‘Broken Britain’ which encapsulates the understanding of families and communities existing in a state that doesn’t correspond to the ‘small state’ ideals of the previous Coalition or current Conservative governments. Hancock et al. (2012) argue that the political

ideology underpinning the 'Broken Britain' rhetoric was driven by government belief of dependency on state welfare as opposed to the significant economic reforms that have been introduced as part of the austerity agenda. The 'Big Society' re-conceptualised a more locally derived way of implementing social policy, through which power would be placed into the hands of the communities, shifting responsibility away from the state (Pattie and Johnston, 2011). Therefore, the role of the voluntary organisations in communities became the utmost of importance during this time period, although the uneven distribution of voluntary organisations and voluntary action within England was potentially a contributing factor to the demise of the 'Big Society' (Pattie and Johnston, 2011; Dowling and Harvie, 2014).

The uneven distribution of voluntary organisations was acknowledged within 'Big Society' discourse, with Iain Duncan Smith of the Conservative party noting that a contributing factor of 'Broken Britain' was the significant amount of 'charity deserts' that exist in England (Mohan, 2011: 6). The concept refers to areas of the country in which formal volunteering opportunities do not exist, therefore the concept of the 'Big Society' and promotion of voluntary and community resolutions cannot progress (Conservative Party, 2008). Mohan (2011; 2012) states that there are issues with the term 'charity deserts' as there are very few places within the country that have no voluntary organisations or action at all. However, there are distinct contrasts between the ratio of organisations in the 'prosperous rural south and disadvantaged post-industrial north' (Mohan, 2011: 6). Not only is it recognised that there are an increased number of voluntary organisations in more prosperous areas of the country, but the capacity of these organisations may also differ between neighbourhoods (Mohan, 2011). Mohan (2012) argues that a desert, in this instance a 'charity desert' is created through long-term climatic change. This change can arguably be due to a continuous period of austerity and social policy reform that has resulted in an uneven distribution of welfare reforms with already deprived areas being hit the hardest (Beatty and Fothergill, 2014). Studies show that where uneven distribution of welfare reforms exist (Beatty and Fothergill, 2014), there are less voluntary organisations particularly in disadvantaged areas (Mohan, 2011). Despite this, a significant number of voluntary organisations operate in Liverpool

(Jones and Meegan, 2015), the fieldwork site for this research. This highlights the importance of continuing this discussion and gathering more information and understanding of the experiences of these concepts on a local level (as explored in section 7.2.2).

Similarly to the work conducted by Mohan (2011), Clifford (2011) found that, depending on geographical area, there is often a lack of resources or a willingness to commit to voluntary activities. These inconsistencies, according to Bryson et al. (2002) elucidate to the fact that the voluntary sector should act as a supplement to statutory welfare provision rather than becoming substitute providers as this would simply lead to long-term unevenness in the distribution of welfare. There is therefore, a call for the consistent support of the voluntary sector from the state in order to allow areas that are less affluent, with fewer resources and limited availability of funding to sustain voluntary action (Clifford, 2011).

Lindsey (2013) suggests that areas of high deprivation are often connected to their local community, dismissing individuals who are not from the community and holding a great deal of ownership over the activities that are organised for the community. This relates to the unequal distribution of voluntary organisations can be partnered with the unequal distribution and impact of social policy reforms. Beatty and Fothergill (2014) conducted empirical research, revealing the inequitable delivery of the national strategy of welfare reforms in England and the financial implications of these on both geographical areas as a whole and to individuals. There is an importance of conducting further research into these arguably deprived areas and the organisations that exist within them. This thesis, through an exploration of the experience of social policy change for voluntary advice organisations in Liverpool, a city that has been disproportionately affected by these reforms, helps will help to further this already growing knowledge base as it uncovers the varying structures of voluntary advice organisations and the differences these structures can provide for advice services, such as greater autonomy (further detailed in sections 7.1.3 and 7.3.1).

2.4.1 Liverpool and the North West of England

Jones and Meegan (2015) and Jones et al. (2016), in empirical studies that used a range of qualitative and quantitative methods, have conceptualised the thriving voluntary sector in Liverpool, situating this both within the wider context of the voluntary sector and within local communities. The studies recognise the disproportionate impact of welfare reform and public sector cuts, as articulated by Beatty and Fothergill (2014). However, they also further this knowledge base as they highlight the resilience of the Liverpool voluntary and community sector in consideration of public spending cuts and the empowerment of voluntary organisations where ‘inequalities and public service demands and most pronounced’ (Jones et al., 2016: 2077). The study highlights Clifford’s (2010) research on the dependence of public funding, stating that the North West has a particularly high dependence on public sector funding. However, this reliance is coupled with the disproportionate distribution of public sector cuts. There have been serious voluntary sector cuts to deprived areas such as Liverpool despite their disproportionately increased dependence on statutory funding compared to the southern counties. This demonstrates greater need for voluntary advice services due to public sector cuts in general (Kirwan, 2017a), coupled with funding resources being cut in deprived areas (Jones and Meegan, 2015). Whilst organisations have recognised the protection the local government had given them from many of the austerity measures, it was found that organisations working with vulnerable service users and those located in deprived neighbourhoods were the worst hit in terms of funding and resource cutbacks (Jones et al., 2016). This is concurrent with comparative research carried out by Macmillan et al. (2011) between an affluent southern and less affluent northern community. They found that whilst the least affluent community had a number of community-involving activities, forced regeneration of the area has meant voluntary and community work has been decreasing with local citizens being unable to sustain the activities (TSRC, 2013). The extent of public funding cutbacks and the driving-up of demand highlights the need for further research into these challenges as there is little literature available to review the impact of this and offer deliberations for advice or other specialist organisations, a need that this thesis meets.

Beatty and Fothergill (2014; 2016) provide an analysis of the local impacts of welfare reforms through the provision of data on the financial loss per adult of working-age. It is established within the paper that the approximate savings of the reforms on a national level is £19 billion, which is an average of £470 a year for every working-age adult (Levitas, 2012: 68). On a regional basis, the historical industrial towns of the North West and East in England have been deeply affected by the welfare reforms of 2012. Worst affected is Blackpool with a £910 loss per working-age adult, with Liverpool ranking 8th at £700 per working-age adult and the North West as a whole was expected to lose £2560 million per annum (Levitas, 2012: 72-75). In addition to this, it was found that as ‘older industrial area’, residents were thought to have been affected most by incapacity benefit reforms such as PIP as a result of their elongated labour market decline (Beatty and Fothergill, 2014). These findings are in line with enquiries in the North West according to voluntary advice organisation, Citizens Advice. They state that the North West is the second highest region for the number of issues brought to the organisation, with the latest statistics from September 2018 showing this to be 502,966 enquiries, 13 percent of the total enquiries dealt with (Citizens Advice, 2018b). Voluntary advice organisations are specifically affected by these findings, as they not only provide advice on the issues related to social policy reforms but are also simultaneously being heavily affected by them (Kirwan, 2017a). Therefore, these discussions are crucial in understanding the experiences of social policy reform for voluntary advice organisations in Liverpool. It is therefore clear to see that demand for advice services, particularly regarding social policy reform and organisations in the area of this fieldwork sites of this research is increasing. Therefore, this thesis further the extant knowledge base by providing understanding of the ways in which differently structured voluntary advice organisations deal with this demand.

2.5 Summary

This chapter analysed voluntary advice, social policy reform, voluntary organisations and change, and finally communities. There is a growing body of knowledge around voluntary advice but it

is concentrated on the work of Citizens Advice (Abbott, 1998; 2007; Galvin et al., 2011; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a) and so offers a one-dimensional argument. It was found throughout that Citizens Advice have been affected by social policy reform in a complex manner, advising on issues that are a result of social policy change whilst also undergoing significant change such as funding cuts and a lack of resources as a voluntary organisation during the era of austerity (McDermont, 2013; Kirwan, 2017a).

Changes to the welfare state date back to the Poor Laws, but this thesis has primarily concentrated on the significant reforms that have resulted from the actions of the more recent Coalition and Conservative governments, particularly their priority of making work pay and austerity following the Welfare Reform Act 2012. Universal Credit, with its roots in historical policy, has streamlined the benefits system, but with retesting and moving boundaries it has created a more complex system, which can be observed through the rising issues at Citizens Advice (Citizens Advice, 2018b). The introduction of Personal Independence Payment brought about a series of retesting and new eligibility criteria that has led to increasingly vulnerable individuals who have left the job market due to illness or disability and are now find themselves no longer eligible for disability benefits. In addition to this, the 'Bedroom Tax' continues to create household debt and significant uncertainty, as well as an increase in issues for voluntary advice organisations (Kirwan, 2017a). Along with these welfare benefit reforms, there has been a series of sanctions that accompanied these changes. These disproportionately affect the most vulnerable in society including those in disadvantaged and poverty-stricken areas such as Liverpool, who usually draw on the services of Citizens Advice and other voluntary advice organisations.

There is a precarious atmosphere in the voluntary sector, one that is uncertain and built on the foundation of change. Policies such as the 'Big Society' and 'Shared Society' have put the voluntary sector in the public eye, and yet not gained political traction. New Labour brought about an era of partnership and the Compact, leading to the most support for the voluntary sector in its history with an increase in public sector funding, especially for *Local* organisations. The formation of the Coalition government in 2010 and subsequently the Conservative government

also ushered in an era of austerity, the shrinking of the state and the implementation of communitarian politics. Despite these significant political differences, the drivers of change for the voluntary sector have largely remained the same, as political forces, funding and the evolving architecture of the voluntary sector. It is therefore, crucial for a voluntary organisation to concentrate on mission and values over funding in a competitive and change driven environment. Communities and regions have been disproportionately affected by social policy reforms and voluntary organisation distribution. This is a concern that this thesis seeks to explore further, investigating if these community relationships can affect the experience of social policy change for voluntary advice organisations.

This chapter has highlighted a gap in the knowledge base regarding voluntary organisations and the provision of advice. There has been some consideration of voluntary advice organisations but this is concentrated around those that have a *Federal* structure with a lack of comparison regarding both *Federal* and *Local* structures (see, for example: Abbott, 1998; 2007; Jones, 2010; Galvin et al., 2011; Holgate et al., 2012; McDermont, 2013; Lee, 2014; Kirwan, 2017a; Organ and Sigafos, 2017). This thesis addresses these gaps in this knowledge base through the dissemination of a multi-site qualitative case study in Liverpool, in which a comparison of a *Federal*, *Local Providing* and *Local Empowering* is conducted; arguing that different structures of voluntary advice organisations do experience social policy reform differently due to their anonymity.

Where voluntary advice organisation literature does exist, it is quite often considered from an organisational or volunteering viewpoint (McDermont, 2013; Kirwan, 2017a; McDermont, 2017). Little knowledge is built around the different roles within voluntary advice organisations or how the provision of advice and the experience of social policy reform differ through hierarchies within voluntary advice organisations. This thesis fills this gap as it demonstrates that not only do voluntary advice organisations experience change differently as a whole organisation, but the hierarchies of roles in each organisation also have varying experiences due to their relationship with the service user.

These changes are therefore important to consider in order to help shape the understanding and experiences of voluntary advice organisations in the future. This thesis considers the social policy reforms that have been fiercely encountered by voluntary advice organisations as opposed to offering a more speculative account of social policy reform in general. Therefore, this thesis addresses the gap in extant knowledge of the provision of advice highlighted within this chapter, through the exploration of the different ways in which it is provided given the experiences of social policy reform and relationship with the local community.

3 Methodology

The purpose of this research is to explore the experience of social change for voluntary advice organisations in Liverpool that differ in organisational structure. The case study sites are located within the Liverpool City Region and their structures are; *Federal (Sierra)*, *Local Providing (Acadia)* and *Local Empowering (Redwood)*. Semi-structured interviews have been conducted with 39 participants across the case study sites to understand how this experience differs between the organisations and the individuals who volunteer and work within these organisations. This chapter highlights the most appropriate qualitative methods that were chosen to carry out this investigation, starting by associating these methods with the philosophical assumptions that underpin the research. It moves on to explore the sampling regimes that were used to select the case study sites, how the data was collected, the reflexive experiences of the data collection experience and the ethical considerations of the research. The chapter ends with an examination of the multi-level and cross-case analysis that was undertaken to interpret the findings of the case study. The methodology adopted allowed for a deep-level of understanding to be gathered from each, an important consideration when seeking to gain understanding of experiences.

3.1 Research Design

This research is a multi-site case study, made up of three voluntary advice organisations of varying structure. A qualitative interviewing technique was adopted to extract a deep-level of understanding from each of the sites, with elements of interpretivism throughout each methodological process. Qualitative research cuts across time, spaces and disciplines, bringing with it several elements of redefinition, its role within society constantly evolving (Denzin and Lincoln, 2011). It is therefore, the role of the qualitative researcher to study things in their natural settings. This situates the researcher within a certain aspect of the social world in which they are studying, this ‘consists of a set of interpretive, material practices that make the world visible’ (Denzin and Lincoln, 2011: 3). The researcher interprets phenomena through the meanings that

the research participants bring to them. Through the conversation style of interviews that have taken place, there are elements of researcher involvement and interpretivism that have been present, both through the interviewing process and the subsequent analysis of the data gathered.

Denzin and Lincoln (2011) outline five phases of the qualitative research process, the first being the positionality of the researcher. A researcher must be aware of their own position within the research, this becomes imperative for their interpretations at the analysis level and their constant reflexivity as the research is carried out (Weenink and Bridgman, 2017). The second phase is that of paradigms, this refers to the principles that structure the way the researcher sees the world, through ontology, epistemology and methodology. This research is framed through a constructivist paradigm, which adopts a relativist ontology, a subjectivist epistemology and a naturalistic methodology, drawing the findings through a grounded theory approach (explored further in 3.2). The third phase is the strategy of inquiry that the researcher will adopt. Strategies of inquiry connect both the interpretive paradigms and the researcher to the empirical world in which they are a part of through their research. This is where the methods of collecting and analysing the data are drawn out. Fourth comes the phase of the methods, which will be used to collect and analyse these empirical materials, as well as the methods that will be adopted to analyse the data that is subsequently gathered and how this will be managed and stored. The final phase is the art and politics of interpretation and evaluation. In qualitative research there is not a clear-cut method of writing up, instead, the researcher will construct interpretations of the data. An additional element to this phase is the importance of field notes and reflexivity, these will consequently have a significant impact on the interpretation and dissemination of results (Alvesson and Sköldberg, 2009).

3.2 Methodological Assumptions

The case study method that has been adopted for this research requires a significant amount of researcher involvement, which is arguably connected to an interpretive epistemology. The research was designed and carried out in a subjective nature. The experiences and thoughts of the

participants involved were the main focus of the research and therefore their actions framed the outcome of the study. Sociological problems and the consequent methodology that is used to study them are underpinned by philosophical assumptions or paradigms, to view society as an object in an individual's environment or alternatively to view an individual within a society. There are multiple offerings of beliefs within sociology, authors providing alternating terms and assumptions. However, three levels of paradigms that are common across many writings are ontology, epistemology and methodology (Lincoln et al., 2011). Ontological and epistemological understandings are entrenched into a sociologists' conception of the world in which they are researching (Kienzle, 1970). The two philosophical assumptions address different problems and therefore raise different questions. Ontological assumptions question the theory of being, whereas epistemology addresses the theory of knowledge, with methodology focusses on how a researcher can go about their investigation (Kienzle, 1970; Jenkins, 2002; Weenink and Bridgman, 2017)

The discovery of knowledge and how it is constructed lies within the field of epistemology, through the sociology of Weber along with other founding figures, the role of epistemology is significant in social research (Israel, 1990). It is through Weber that the precondition for cultural science is developed (Jenkins, 2002). It is suggested that through their belonging to a culture, human beings have the ability to possess a conscious positionality within the world and therefore convey meaning to their world (Israel, 1990). Interpretivism is a direct contrast to a positivist epistemology, viewing the subject matter of the social science to be radically different to that of the natural sciences. Its history is rooted in hermeneutics which places focus on the importance of understanding human action (Bryman, 2016). An interpretivist epistemology signifies that researchers interpret the meanings and actions of the actors or individuals of the study depending on their own subjective frame of reference, they can then interpret these actions from their point of view (Williams, 2000; Bryman, 2016). Phenomenological traditions are also visible within an interpretive epistemology, as described by Schutz, social reality has intrinsic meaning for humans and therefore human action is meaningful. Therefore, it is the role of a social researcher,

particularly within this research, through their investigations to access the ‘common sense thinking’ of their participants and interpret actions from their point of view (Bryman, 2016: 27).

Ontology is concerned with the nature of social entities, from two major standpoints of objectivity and constructivism (Bryman, 2016). Constructionism, or social constructionism, is rooted in the understanding that social entities have been created through the perceptions of social actors and social interaction ‘reality is socially constructed and the sociology of knowledge must analyse the process in which this occurs’ (Berger and Luckmann, 1966: 13). This is a phenomenon which is under constant revision, therefore the notions of truth and objectivity are overruled by an overwhelming concern of what the research brings with it (Given, 2008; Bryman, 2016). Research that investigates the voluntary sector can be underpinned by the production of objective knowledge that arguably provides ‘useful, practical knowledge for third sector organizations’ (Weenink and Bridgman, 2017: 92). However, this is not the sole purpose of this research, but rather it is the lived realities of the individuals within a voluntary organisation and the organisation as a whole that is of importance. This method also has practical applications for the voluntary advice organisations involved, whose management and trustee boards can gain insight into the experiences of the staff and volunteers within their organisations. Social constructionism rejects the view that a social reality is external to a social actor, instead of acknowledging that reality is constructed between people and the existence of multiple realities which share specific social constructions (Gergen, 2001; Bryman, 2016; Weenink and Bridgman, 2017).

The method of the interview is a socially constructed event in which the researcher can expect to extract a breadth of information regarding ‘particular social phenomena involving particular people at a particular time and in a particular place’ (Pole and Lampard, 2002: 127). This can be associated with a subjective epistemology that recognises that knowledge is constructed through the interactions and relations that are built between researcher and participant, an element of the methodology that is intrinsic to gathering as much data as possible for this study (Weenink and Bridgman, 2017). Epistemology and ontology are instrumental in the interview process, an individual’s knowledge, experience and views make up the social reality that the research

questions are constructed to explore. The epistemological position suggests that the way in which data are generated to highlight these characteristics is through the conversation and access this gives the researcher to their personal accounts of the phenomena in question (Pole and Lampard, 2002).

As this research is exploratory and interpretive, it is based on the basic assumptions of the data that will be gathered rather than testing a hypothesis. Therefore, Glaser and Strauss' (1967) grounded theory route will be adopted, theory will be discovered from the data, which has been systematically obtained from social research methods. This system has been adopted for this research as the theory will be suited to the themes of the data, rather than dismissing or falsifying earlier assumptions. Grounded theory grew from filling the gap between hypothesis testing which was 'devoid of any connection to everyday reality' and ethnography which was 'preoccupied with description instead of explanation of social phenomena' (Boeije, 2010: 8).

The principle of grounded theory is to arrive at and generate a theory based on the uses of the data gathered as opposed to logical deduction or *a priori* assumptions (Glaser and Strauss, 1967). In order to build such a theory, analysis of the data results in the formation of significant categories, in this case *advice, employees, volunteers, community* and *the drivers of change*. It is argued that these analytic directions are able to arise depending upon how researchers interact with their data and interpret comparisons between findings and wider categories (Charmaz, 2006). This process of theory development and analysis has been adopted for this research. Such methods make it possible to inductively make sense of the robust qualitative data collected and highlight important categories that have led to the production of theory as a result.

3.3 Case Study Design

A multi-site case study method has been adopted in this research. This is made up of three voluntary advice organisations, *Sierra, Acadia* and *Redwood* who all differ in organisational structure, as explored in section 1.5. Thirty-nine interviews were carried out with supervisors, employees and volunteers within each organisation. Case study research is often married with

qualitative methods of inquiry due to their ability to produce value-rich and detailed results (Yin, 1994; Bryman, 2016). Case study research of this nature is largely concerned with complex relationships and the particular nature of the case in question, the most effective method for investigating ‘a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident’ (Yin, 1994: 13). The case study method is an example of an idiographic approach that reveals the unique features of the case, rejecting more nomothetic approaches that operate through the generation of results regardless of time and place (Bryman, 2016).

A multi-site case study design was employed for data gathering as case studies focus on the choice of what should be studied rather than the choice of method used to study a particular phenomenon (Flyvbjerg, 2011). A typical case study would often include developmental factors, assessing how the case study evolves over a set period, however, this case study design demonstrates a unique snapshot of time, exploring the role of social policy reform for the communities involved. Case study research can be made up of single and multi-site cases. Multi-site case studies are occasionally viewed as a standalone research method, however, in most cases, they are acknowledged as an extension of the case study method design and considered more robust than the single case study (Yin, 1994). They do require greater resources and researcher time, this had to be considered in the selection of case study sites that have been used in this design as each case must serve and contribute a specific purpose for the overall research (Yin, 1994). The comparative element of the multi-site case study design involves comparing the case study sites using almost identical methods for each, which has an element of cross-sectional design. The cross-sectional design involves the collection of data from a sample of cases at a single point in time to contribute and build a body of data and assess their patterns of association (Bryman, 2016). This has been viewed as a disadvantage to carrying out case study research as it may lose the specific and in-depth focus that case study research is based on, although, there is still emphasis on understanding the wholeness of a case study site, also creating an additional platform for comparing these sets of wholeness findings (Thomas, 2016).

This research has three research sites as part of the case study, the cases have been selected based on their similarities of advice-giving and size³ as well as organisational type. An advantage of this is the open-ended approach to selecting cases, any differences, for instance in advice-giving, that are found have emerged from the data, and the cases have not been selected due to their differences at the outset of the research. This allowance of distinguishing characteristics supports the building of theoretical reflections about contrasting features (Bryman, 2016). The purpose of this multi-site case study design is exploratory, this is because little is known about the particular area of voluntary advice agencies and their experience of change. Therefore, an in-depth exploration into this area will allow for the establishment of the shape of the problem, with all case study sites being explored at the same time in a parallel nature (Thomas, 2016). Whilst these are all advantages of carrying out research based on a case study design, the research will have a select number of disadvantages that cannot be avoided due to the intensive nature of the design. For instance, there could be instances of selection bias as particular relationships may be understated or overstated. Further to this, there will be a weak understanding of the occurrence of this phenomena in the entire population, from this any statistical significance of the research will be unknown (Flyvbjerg, 2011). The case study is being approached in order to build a theory from the data that is gathered through the research, creating a framework of ideas that can be used to explain and understand this phenomenon for voluntary advice organisations and the wider sector. The research is therefore open to interpretations with a focus on generating ideas as the research progresses rather than testing or falsifying a hypothesis from the outset (Thomas, 2016).

3.4 Sampling

This study employed a generic purposive sampling technique, through which the sample is selected purposively but not necessarily to drive a theory, as is the case for theoretical sampling. Instead, the criteria by which samples are recruited are selected in order to address the research

³ The case study sites involved in this research are all medium-sized, which according to NCVO have an annual income of between £100,001 to £1,000,000

questions of the study (Bryman, 2016). Whilst this thesis has adopted a grounded theory approach, this generic purposive sampling technique was implemented to address the exploratory research questions that were designed. Therefore, it retains the ability for theories to emerge and evolve from the research process.

Purposive sampling often involves more than one sampling approach, with one purposive approach usually preceding the other in order to broaden the contacts and sample within the research (Bryman, 2016). This research has adopted an extreme case sampling to recruit the voluntary advice organisations and opportunistic sampling when recruiting employee and volunteers. The selection of the three sites that make up this case study was an important aspect of the methodological procedure. This selection process subsequently frames the findings of the project and so must be undertaken with rigour. However, there is a lack of academic literature which suggests the most appropriate means of sampling for multi-case study projects (Sharp et al., 2012). The justification for the case selection is provided as it has been suggested that both ethical and theoretical implications can arise from the inclusion or even exclusion of case study sites (Curtis et al., 2000).

The cases involved are the main emphasis of the research, rather than the overall picture of the field. This study investigates unique sites that provide advisory services that cannot be speculated about or conclusions drawn regarding their provision of advice without in-depth analysis into each site (Teddlie and Yu, 2007). The selection of sites can be overlooked and simplified, the rationale for selection ending at the location of the site. An important consideration is the inclusion of the sites regarding their appropriateness to the research as opposed to solely their location and ease of access for the researcher (Walford, 2001). Sharp et al., (2012) suggest that convenience sampling can be adopted to recruit sites and participants which appear to be the easiest to access. This is not the case for this research, as generic purposive sampling was used, with both extreme case sampling and opportunistic sampling being used to gain access and recruit participants.

Purposive sampling is the sampling regime typically associated with qualitative studies as its primary function is to address the research questions and aids the selection of sites that are best suited to these questions (Barker et al., 2005; Teddlie and Yu, 2007). Purposive sampling has been used in multi-site comparison case studies in order to highlight the key similarities and potential differences between the sites involved (Maxwell, 1998). For this research, generic purposive sampling was used, the sampling regime follows the standard practices of non-probability sampling by selecting participants in a strategic manner in order to address the research questions posed (Bryman, 2016).

Extreme case sampling, which is the selection of cases based on their unique features, was adopted to recruit the organisations that would become involved in the study (Teddlie and Yu, 2007). Each voluntary advice organisation has its own characteristics and offers diverse discoveries to the research field (as displayed in Table 2). Sampling the organisations in this way allows the comparison methodology to be carried out without conducting a comparison of similar sites.

Pseudonym	Organisational Structure
<i>Sierra</i>	<i>Federal</i> organisation – branch of a national voluntary organisation
<i>Acadia</i>	Previously affiliated to a national organisation – now structured as a <i>Local Providing</i> organisation
<i>Redwood</i>	A <i>Local Empowering</i> organisation

Table 2: Pseudonyms of Case Study Sites, adapted from Knight (1993)

The comparison of the experiences of different levels of staff within the organisations is also known as multilevel sampling. This occurs when two or more subgroups, in this case, three; the manager of the organisation, employees and volunteers, are extracted from a different level of the

study represent the hierarchy of the organisation. As this hierarchical element is being exposed, the sample sizes of the participants from each subgroup and across sites are not uniform (Onwuegbuzie and Leech, 2007). In order to gain access to these hierarchical subgroups, opportunistic sampling was used to gain access to employees and volunteers. This requires sampling participants according to those who are available at the time the study is being conducted and fit the requirements of the study, which in this case was any employees or volunteers. The managers who had already been interviewed as part of the study took on a gatekeeper role and provided name lists of all members of staff and volunteers, through scheduling and willingness to take part, a full sample was gathered. There was more flexibility in the recruitment of participants at *Sierra* and *Acadia*, as they have a larger staff and volunteer bases, there was little room for manoeuvre at *Redwood*, which had a limited number of staff and volunteers. The final number of participants that were recruited is displayed in Table 3.

	<i>Sierra</i>	<i>Acadia</i>	<i>Redwood</i>	Total
Managers	1	1	1	3
Employee	4	4	2	10
Volunteers	10	10	6	26
Total	15	15	9	39

Table 3: Participants recruited to take part in qualitative interviews further details in Appendix One

The multi-site case study method that has been adopted for this research requires only a small sample, yet generalisability is often obligatory (Walford, 2001). A fundamental issue with purposive sampling, and often associated with other aspects of qualitative research, is generalisability. A route through which this can be addressed is with mixed methods sampling,

which creates elements of generalisability through recruitment whilst ensuring that the research questions are answered in the best way possible (Sharp et al., 2012). This does not allow for generalisability that would be statistically significant, however, a concept known as transferability can be provided through the detailed description of the research findings and procedures (Walford, 2001; Onwuegbuzie and Leech, 2007). Additionally, elements of analytic generalisation can be taken from this research as the research findings that ensue in Chapters 4 to 6 can be applied to wider theory depending on how the case study sites correspond to general constructs of the research field (Curtis et al., 2000).

3.5 Fieldwork Sites

Interviews were carried out across the three case study sites involved in this research, all of which differ in their organisational structure which provides the most opportunity for cross-case analysis as a result of the extreme case sampling to recruit the organisations. The three involved in this research are:

Sierra – A *Federal* organisation that is a branch of a national charitable body. At the time of this research, the organisation was operating from three locations within a small community outside of Liverpool city centre. The organisation is a medium-sized organisation⁴, operating with 32 members of staff and 40 volunteers. Since completing fieldwork with the organisation, the branch has undergone a merger with another branch within the city. The organisation still provides advice from one of their main locations that took part in this research but has closed other locations as a result of the merger. This is also coupled with many of the participants in this study being removed from their paid employment or terminating their voluntary work with the organisation.

Acadia – A *Local Providing* organisation operating independently from any national charitable bodies. The organisation operates from two locations within Liverpool city

⁴ A medium-sized organisation according to NCVO has an annual income of between £100,001 to £1,000,000

centre. Their main office in the business quarter of the city that provides an anonymous advice location for service users and a more specific branch of housing advice that is located within a court facility. The organisation is medium-sized with 13 employees and a cohort of 20 volunteers. The organisation has recently undergone a significant period in which it transitioned from a *Federal* organisation to one that can now be defined at *Local Providing*. They retained a large cohort of staff and volunteers within this time as well as the location and operation of the organisation to allow for continuity for service users.

Redwood – A *Local Empowering* organisation that is located in a community within the Liverpool City Region. The organisation operates for the benefit and development of the local community and is therefore not affiliated to a national body. The organisation is medium-sized, similarly to the other two case study sites operates with a larger cohort of volunteers than paid staff with 13 employees and 24 volunteers. The organisation is operating from one site; however, they do take their services out to the local community by offering outreach programmes at several locations.

3.6 Data Collection

Semi-structured interviews were adopted in order to ensure that particular topics were covered across all interviews, whilst also allowing freedom for both the researcher and respondent to add further detail or explore different topics throughout the interview if necessary (May, 2001; Pole and Lampard, 2002; Kvale and Brinkmann, 2009).

A general view of case study research is that it should be non-invasive and observational. With this in mind, ethnographic research can be the favoured choice of method, in the instance that interviews are adopted for case study research they should be based around gathering information about the case, not the interviewee (Stake, 1995). This research aimed to explore both the general experiences of the three case sites as a whole but also the personal experiences of the individuals who are involved in the voluntary advice organisations. Therefore, semi-structured interviews

were the most appropriate method of data collection, for both their level of flexibility and comparability as well as their quick procedural time (May, 2001), characteristics that are popular in multi-site case studies (Hannerz, 2003).

The principle of the interviewing technique is the generation of conversation, which subsequently produces insights into an individual's experiences, attitudes and opinions (May, 2001). Social scientists have historically viewed conversation as critical data to explore particular phenomena,

‘For the greater part of his information the investigator must find his own witnesses, induce them to talk, and embody the gist of this oral testimony on his sheets of notes.

This is the method of the interview, or ‘conversation with a purpose’, a unique instrument of the social investigator’ (Webb and Webb, 1932: 130).

In order to gather the most robust data possible, and in keeping with the semi-structured format, interview guides were developed for each of the hierarchical subgroups (Appendix Two to Appendix Four). This was carried out to gather comparable data and ensure that the topics of voluntary advice and social change were covered in each interview. A practical advantage of designing an interview schedule is that it ensures that the researcher has planned to make the most of the limited time that is available in the interview setting (Patton, 1990). A mixture of directive questions and non-directive questions were designed to gather factual answers and more complex, detailed responses respectively (Pole and Lampard, 2002). These directive questions were often placed at the beginning of an interview to act as ‘ice-breaker’ questions, allowing the respondent to feel comfortable in the interview setting before moving on to the non-directive question to gather more detail regarding the respondent's experiences and opinions (Pole and Lampard, 2002). Ahead of carrying out qualitative interviews, especially those of a semi-structured nature, researchers must possess the skills required to understand the respondent's point of view in order to ask these non-directive questions and allow the interview to continue on an unrestrained path (Burgess, 1982). Further to this, the acquisition of knowledge of technical terms and understanding of cultural meanings is central to semi-structured interviewing in general and

especially for this research, as the interview would cover topics of welfare benefits and community-specific projects. Becoming familiar with these technical terms allowed a greater level of detail to be gathered, as well as, the skills to verify any queries or misunderstandings both in the interview and during the analysis of the data (Burgess, 1982).

The location of the interviews and recording process was also an important consideration prior to the commencement of the data collection process. All interviews were carried out at the case study site, in many cases in a private interview room or office that was used to provide advice sessions, the respondents were therefore in a space that they were comfortable in and it was in a convenient location for both parties. Furthermore, the interviews were audio recorded and fully transcribed to provide accurate recollection of the conversations. Along with the practical application of the interview location, researcher presence must also be acknowledged as an important aspect of the interview process. Non-verbal cues can ultimately affect the outcome of the interview with a concept known as effective attending being introduced to explain these. Communicators such as physical position, posture and eye contact led by the researcher can influence the respondent's level of comfort and their willingness to share more detailed insights (Pole and Lampard, 2002).

3.7 Reflexivity

One of the main obstacles in carrying out this research was gaining access to the voluntary organisations involved. All three case study sites were willing to take part in the research in the first instance, all aware of the positive results of in-depth qualitative research in their organisation. For instance, providing a voice for the organisation as a whole and managers being able to receive feedback from staff and volunteers through an outside source. Despite this, gaining access to individuals to arrange research interviews was problematic. At *Sierra* a phone number was given for each member of staff and volunteer, therefore calls could only be made in between appointment times and calendar merging was a difficult process as a large number of volunteers were only on the premises for one or two days per week. The process was less challenging at

Acadia, the volunteer representative who had also taken part in an employee interview acted as a gatekeeper and organised the interviews on my behalf. This was set up as an appointment in the organisation diary and confirmed with me via email. This did have a downfall, as I was often given a set amount of time to carry out the interview. In some instances, it was clear that the volunteer was waiting to get to another appointment. *Redwood* was the most difficult organisation to gain access to, they have the smallest staff and volunteer base of the three chosen case study sites and therefore arranging interviews with staff and volunteers both via email and telephone was troublesome as their days are spent within their projects and dealing with enquiries. It was due to this reason that the smaller sample was used for this organisation.

Physical access to the case study sites was not a problematic issue for the research, however, it did alter the experience of the interview process as a differing level of rapport could be built at each of the organisations. The supervisor at *Sierra* had given permission to gain access to the organisation via the staff access door, this allowed access to the staff area of the organisation where informal conversations were held with volunteers who were going to be future participants. Interviews were also carried out in quick succession, therefore; staff and volunteers were aware of my presence within the organisation on a regular basis. Other issues also ensued at *Sierra*, during an interview with *Sheila* (Appendix One), electricity had been cut out, the internet was down and so the interview had to take place in a communal staff area during a lunch break. This meant that the audio recording of the interview could be compromised and the interview would take slightly longer than originally planned. Therefore, a large number of field notes had to be made and anything that was not clear at the time had to be confirmed during the interview, a task that would have usually been completed post-interview before leaving the case study site.

The *Acadia* manager and volunteer rep had provided me with the passcode to enter the staff area of the office. However, the set-up of the office made it more convenient for myself and interviewees to meet in the public waiting room. This allowed conversations to be held with reception volunteers and service users, providing insight into the daily operations of the organisation before moving to a private interview space. The most formal access was found at

Redwood, staff and volunteer offices are located in a separate building or in a coded office, therefore I would often wait to be met in the reception area without any rapport building conversations being held.

The recording of the interviews was carried out on a mobile telephone device rather than an obvious recording device and subsequently transferred onto a secure computer, this was carried out for a number of reasons. Firstly, as the majority of the research population were volunteers and a relationship had not been previously built through researcher immersion into the field, a more obvious audio recording device may have been a distraction for the respondent which could compromise the free-flowing conversation that was designed with the semi-structured interview technique. Whilst the majority of interviewees were comfortable being audio recorded, *Justin* offered more anecdotal and detailed information regarding his role and changes to the organisation after the audio recording had finished. This required engaging conversation to ensure that the respondent had sufficient opportunity to share information that was obviously important to them but reassuring that this information would be used and stored in the strictest confidentiality.

The importance of reflexivity and reflection in empirical research has been considered as it can be fundamental in ensuring that the empirical research has value in its particular field. An element of critical self-exploration takes place during the initial reflection and the dissemination of these reflections ahead of the commencement of the analysis process, along with a process of 'interpretation of interpretation' which places the research positionality in the centre of the research findings (Alvesson and Sköldberg, 2009: 9).

3.8 Negotiating Ethics

The Liverpool John Moores University and British Sociological Association ethical guidelines informed the design and subsequent practical execution of this research (British Sociological Association, 2017). The ethical implications of conducting social research were considered throughout the research process. The protection of participants and the researcher is paramount

and for that reason, anonymity, confidentiality and informed consent are some of the most significant considerations for this study.

As the three case study sites offered services that could make them identifiable, it was decided that their responses would be anonymised in order to protect their identity. Further to this, respondents have been given pseudonyms that will ensure that their identity is not discoverable in this thesis or any future publications from this research (see Appendix One). This is also carried across to the sharing of any information with the management team of the voluntary organisations. Respondents could, therefore, speak freely in the interviews, knowing that their information would be attributable whilst still being able to share their thought and opinions.

Confidentiality was also an important aspect of the ethical procedure during this research, it was of the utmost importance that all respondents knew that their information would be confidential in order to build rapport and a professional relationship between researcher and interviewee. Therefore, respondents were given an information sheet (Appendix Five) prior to the commencement of the interview that outlined the nature of the research and how their data would be managed and stored during the research process. Following this, informed consent (Appendix Six) was gathered with the respondent providing consent to take part in the interview, and for it to be audio recorded as well as stating their knowledge that their data would remain confidential and anonymous with the right to withdraw from the study at any time.

As a researcher, I had a responsibility to engage with ethical considerations throughout the research and to uphold the commitments that had been made to the organisations and participants involved in the research. As interviews were conducted with multiple participants at each organisation, I took care to not disclose these meetings with participants. If a participant was aware of other interviews, it was further ensured that any data or details that had been gathered in these interviews were not revealed. Ethical consideration continued after the data collection phase had concluded. The transcription of audio recorded interviews was conducted off-site,

therefore I cross-checked all transcripts to ensure they had been successfully anonymised and the information transcribed was accurate compared to what the participant had verbalised.

Information and data that had been gathered and subsequently analysed at *Acadia* and *Redwood*⁵ were shared with the respective organisations at the end of the fieldwork period. The aim of this was to highlight how the research could benefit the organisation's future development. It was important to ensure that the participant's data remained anonymous and confidential so that they could not be recognised in any future use of the data by the organisation. During this process, I removed the pseudonym for the organisation from the data set, as it was to be shared with the organisation themselves. I further replaced the named pseudonyms that had been used within this thesis for the term 'employee' or 'volunteer'. This ensured that the data could be used by the organisation to its full potential, but that all participants remained anonymous within the data.

3.9 Analysis

Data analysis in qualitative research can be demanding, time-intensive and complex as research materials need to be broken down into manageable segments that can be understood and rearranged to create a coherent understanding of the whole dataset (Boeije, 2010). In conducting analysis on this research for the purposes of this thesis, multiple forms of analysis were used to explore the data gathered at the voluntary advice organisations involved. This included a two-fold coding process (explored in section 3.9.1) and selection of direct quotations to highlight the nuances between participants and the case study sites in general.

A wide breadth of data had been gathered during the research process, therefore a number of analytical tools were used to process and understand the data. Multi-level analysis has been used to analyse and interpret the data that has emerged from a single case study site, between managers, employee and volunteers (Stake, 2006). Further to this, cross-case analysis has been used for the

⁵ Since the completion of the fieldwork, *Sierra* has merged with another branch of the *Federal* organisation. The contact that I had created with the organisation has since ended and so there was no opportunity to share the findings of the research with the *Sierra* organisation.

comparison elements of the research, thematic analysis has been adopted to compare and contrast the three voluntary advice organisations (Onwuegbuzie and Leech, 2007). There are elements of grounded theory within the data analysis process, as with the data collection and research project in general, whereby this project is not hypothesis testing but developing theory inductively (Glaser and Strauss, 1967; Kvale and Brinkmann, 2009).

As grounded theory utilises conceptual categories that are discovered through a close examination of the data, this data is imperative to building and understanding a theory. Therefore, in order to demonstrate the category and use it to build a theory, evidence from which the category emerged is used in this illustration (Glaser and Strauss, 1967). For instance, in this study specific quotations were chosen that illustrated either represented an overarching experience at the organisation, but also exceptional experiences that were demonstrated by the participant. The multi-level and cross-case analysis designs were used to identify key codes, patterns and relationships that were used for the comparative elements of the research (further explored in Chapter 7). The process of generating theory through grounded theory often includes important aspects of comparison as this element can be used to generalise and broaden theory to become more applicable to the wider sector or research field (Glaser and Strauss, 1967). Following these analyses and generation of key codes, the processes of grounded theory were adopted to examine the data, from which the conceptual categories were generated. It is the detail of the five categories, *advice*, *employees*, *volunteers*, *community* and *the drivers of change* and the relationships between them that provides the context for the findings and theory-driven discussion chapters (see Chapter 7).

Many aspects of grounded theory have been adopted in this research, particularly generating a theory from a close examination of data that has been gathered through the research process. It is also noted that researchers are also able to utilise the flexibility of grounded theory without being prescribed to rigid understandings (Charmaz, 2006). One of the biggest challenges of analysing qualitative data, which also led to the adoption of grounded theory, is unpacking and understanding a large amount of data. Unlike quantitative data, there are no formulas for

determining significance and no straightforward tests for reliability and validity, for qualitative data the analysis will ‘always include interpretations of the empirical data’ (Boeije, 2010: 94). It is this interpretation and the researcher’s interaction with the data that allows comparisons and analyses to emerge, building a picture of the study and generating theory that is underpinned by the processes of grounded theory (Charmaz, 2006). The flexibility of grounded theory is the main benefit that was considered throughout the analysis process of this research. The comparative case studies were well suited to grounded theory as generalisations around *Federal* and *Local* organisations were a main focus of the discussion and conclusion of the study overall.

3.9.1 Transcribing and Coding

The interviews were all fully transcribed by myself in the first instance and later outsourced to a professional transcription service due to time constraints. Whilst this removed some elements of in-depth understanding of the data, upon receiving the transcripts, they were all cross-checked by myself in order to recall the interview and ensure I was familiar with each data set. A mixed approach was taken to thematically analyse the transcripts of the interviews that had been carried out, using both deductive and inductive approaches. Deductive methods of analysis often utilise an *a priori* template of codes that mirror the patterns being sought through thematic analysis (Crabtree and Miller, 1999). On the other hand, inductive approaches are data-driven and use the text to discover patterns and overarching assumptions (Boyatzis, 1998). The coding process was initially driven through research questions I and II (see section 1.5), which were based upon previous study results and therefore sought to discover the relationship between *social policy* and *advice*. In exploring the provision of advice, the relationships between individuals in each organisation emerged and highlighted the differences between roles at organisations. As a result, this led to the development of the *employee* and *volunteer* codes. The theme of the *drivers of change* was initially identified through an extensive literature search. However, the detail in which the code was developed was carried out inductively, being driven by the text and incidents that were identified in the data. The final theme that grew solely from the data is that of

community. It highlights the relationships that each of the levels of staff within the organisation have with members of the local community and subsequently became an overarching pattern of the dataset. Therefore, both initial coding by hand and focussed coding using specialised software NVivo allowed me to gather deep understanding of this theme and compare it across cases.

Coding following a grounded theory approach involves asking analytic questions of the data we have gathered and often occurs multiple times using a range of techniques (Charmaz, 2006). Initial coding studies fragments of data, such as words and particular incidents in order to provide definitions and primary labels to the data which allow patterns and relationships to be identified in later stages (Charmaz, 2006). This initial coding of the interviews was carried out by hand, allowing for dynamic annotations to be made and for connections between codes and themes to be identified with ease due to the complex multi-level and cross-case analysis that was being undertaken. This process was followed by a more in-depth coding technique known as focussed coding. This technique uses the most significant codes to sift through the data, therefore requiring decisions to be made about which codes have the most analytic significance. In this case, this was led by the *a priori* themes that had been previously identified such as *social policy* and *advice* and the patterns and relationships that had begun to emerge such as *employees* and *volunteers*. Carrying out both initial and focussed coding of full transcripts provided a depth to the research that aided understanding of the data, selection of quotations and the building of subsequent theories.

The focussed coding was carried out on the computerised package NVivo, which can assist in the undertaking and management of the analysis of qualitative data (Bazeley and Jackson, 2013). Using a computer management system can provide a focus on examining the meaning of what has been recorded and transformed into a transcript. This examination is often carried out visually as the structure of cases and the relationships between cases can be visually represented and understood (Bazeley and Jackson, 2013). The choice to code by hand and subsequently by computer in this thesis allowed for new directions to be discovered inductively through the focussed recoding process using NVivo. The technique also allowed for a clear, visual

representation of the themes of the data, producing five key codes that have ultimately driven the development of theory from the data.

Coding is one of the core processes in grounded theory analysis (Boeije, 2010), through reviewing the transcripts in this two-fold manner labels, or codes, could be applied and their significance highlighted (Bryman, 2016). This two-fold coding also allowed for the analysis to be in constant revision, with codes and themes being altered and moved as the transcripts were re-evaluated. According to Charmaz (2006), this state of constant revision and fluidity is central for producing theories from the data. This allowed for particular quotations to be highlighted that told the story of the organisation or reflected particular nuances that were important in building relationships within and between case study sites from specific participants. This was revisited as recoding through focussed coding occurred and a closer selection of quotations was carried out to reflect the relationships that had developed through the data. Many of the quotations used throughout the thesis emphasise the individual experiences of the participants which also aided the theory building of the organisations and highlighted the many differences between the three structures of voluntary advice organisations involved.

Corbin and Strauss' (2008) approach to coding was adopted to make sense of the data in both multi-level analysis and cross-case analysis. Firstly, open coding was used to divide the data into broad categories and begin the conceptualisation of the research field in question. Secondly, axial coding rebuilt the data and created connections between these categories. It was during this process that the significance of the categories started to become clear. Finally, selective coding allowed core categories to be prescribed and for connections to be made between these and other categories. This core category is central to the integration of theory and is a construction of the researcher (Corbin and Strauss, 2008).

3.9.2 Multi-Level Analysis

The multi-level analysis was carried out to frame the subsequent results chapters and provide insight and detail into each of the case study sites. Each case is unique and much therefore be

analysed and understood in these unique terms in the first instance (Stake, 2006). This was a crucial aspect of the analysis process as the experience of social and organisational change that was experienced by each of the levels of staff can be explored in detail and comparisons can be drawn within each of the voluntary advice organisations. This initial analysis also provides an understanding of each organisation, thus making the cross-case analysis clearer as a deep level of analysis and understanding of their processes, similarities and differences had already been highlighted here. The levels of analysis for this analysis stage were a) manager b) employees c) volunteers for each voluntary advice organisation.

Manager - At this level, interviews with the managers of the case study sites were analysed to provide an insight into their organisation as a whole, producing an overall understanding of the processes, advice giving and role of the organisation in the local voluntary field. This also gave an opportunity to gather individual biographies of each manager and their role within the organisation and also a personal narrative of the impact of social change on the organisation as a whole. The themes of the manager interviews were coded under the headings 'change', 'community', 'advice', 'staff and volunteers'.

Employees - These interviews became more personal and were commonly based on project specific advice that the particular employee was a part of, such as 'housing' or 'money advice'. A salient theme of this analytical level was the role of a paid employee in a voluntary organisation and the responsibility that this role entails. This led to the following themes being identified across this level; 'background and motivation', 'organisational change', 'social change', 'advice' and 'service users'.

Volunteers - This analytical level provided a much more personal account, the voices of the volunteers being incredibly important at this level in detailing the advice-giving procedure and front-line issues that were being brought to and occurring within the organisation. This level of analysis was particularly useful in displaying the importance of the community to each of the organisations, with more emphasis being placed here on

community action and personal motivation for volunteering. The noticeable themes that were present during the analysis were; 'advice', 'community', 'change'.

3.9.3 Cross-Case Analysis

The case study sites that made up this research were also compared to each other, Stake's (2006) model for multi-site case study analysis was referenced throughout the analysis process but not followed in its entirety. This allowed specific analysis to take place but the freedom to move between analysis procedures if necessary. Therefore, prominent themes were identified during multi-level analysis for each case, these were then compared across each case study site. Similarities between cases are often at the forefront of multi-case study approaches, it remains important, especially during this research, to identify the differences between each case and the significance that these differences hold (Stake, 2006). Therefore, each case study site has maintained its unique features during the analysis process, with the individual case features and their positionality in the wider research field being prominent.

3.10 Summary

The research methods for this study were selected in order to gather in-depth qualitative data, analogous with interpretivism and social constructionism. The dual sampling technique allowed for the multiple aspects of the research to be developed, gathering the most detailed information possible. The richness of conversational, semi-structured interviews were able to drive the knowledge of the research, exploring the experiences of managers, employees and volunteers. These interviews were conducted within the multi-site case study technique to give way to a comparison between the different organisational types of voluntary advice organisations. The multi-site case study and semi-structured interviews promoted the examination of the experiences, opportunities and challenges of voluntary advice organisations during a period of social policy change, and the similarities and differences between the organisations and participants involved. The dual aspect of analysis, along with the sampling technique allowed all

aspects of the research design to be considered, with multi-level analysis granting comparisons to be drawn between the hierarchies that exist in each organisation. Cross-case analysis brought about a comparison of the main themes of each organisation. The use of both forms of analysis, therefore, highlighted the experiences of multiple individuals and the similarities or differences that exist between voluntary advice organisations.

4 Case Study Site One – Sierra

This chapter provides insight into the case study site *Sierra*, by examining the *Federal* structure and operations of the voluntary advice organisation in order to address the research questions detailed in section 1.5. The chapter analyses five key themes that emerged from the data collected at *Sierra*; including *advice, employees, volunteers, community* and *the drivers of change* respectively. The chapter explores the provision of advice at *Sierra*, how this differs between employees and volunteers as they navigate increasingly complex issues that are often altered to suit the needs of funders rather the service users. The chapter argues that social policy reform following the Welfare Reform Act 2012 is experienced differently amongst the hierarchies of managers, employees and volunteers at the organisation due to their varying relationship with service users. The emphasis that *Sierra* puts on adapting advice to the needs of funders is influencing the relationships that advisers, particularly volunteers, build with service users and therefore altering the provision of advice. Therefore, recent social policy reform is creating a challenging atmosphere for the provision of advice at *Sierra*.

4.1 The Story of *Sierra* – A *Federal* Organisation

Sierra is a *Federal* organisation as defined by Knight (1993) (see section 1.3), in which it abides by the rules and regulations of a national charitable body, but has some degree of local autonomy and is responsible for its own affairs. The *Federal* model suggests that the national body and local branches work in unison towards the same goal (Knight, 1993). This structure is beneficial for many individuals who use and work within the organisation. For instance, volunteers are able to access the service user's background information on a shared resource system, something that interviewees revealed to be important when dealing with often multiple issues, from one service user at any one time. Volunteers also benefit from a nationally-based intranet, a tool that is utilised in self-help-based sessions and as an additional resource for more complex appointment-based

sessions. This allows the branch and wider national body to maintain continuity in the advice provided.

The research carried out at the *Sierra* case study site offers an alternative viewpoint to other voluntary advice literature available (see, for example: Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013). Each of these authors' studies was qualitatively conducted to investigate employment advice with Citizens Advice, from employees without a trade union representative (Abbott, 1998; 2007), minority ethnic workers gaining advice outside of the workplace (Holgate et al., 2012) and employment tribunals and the legal casework involved with Citizens Advice (McDermont, 2013). This thesis, on the other hand, explores both the general and project-specific aspects of advice that is provided at *Sierra*. This general advice is described by *Sierra* as the lines of advice that are covered by volunteer assessors and advisers, most often benefits related. Project-specific advice, on the other hand, was described as advice that follows a specific theme, such as housing or debt, and is provided by employee advisers who have been trained and funded in that specific area. The organisation primarily provides generalist advice, meaning service users are therefore able to use the organisation for advice on any issue that is not understood as a 'legal matter'. Issues largely cover; benefits, work and employment, debt and money services, consumer, family, housing, immigration and health. There are also project-specific teams of employees and volunteer advisers who advise on specific themes such as money advice, advice within GP surgeries, financial capability and pension-related issues.

Since the completion of the fieldwork that informed this results section, *Sierra* has undergone substantial structural reform. This is concurrent with the rules and regulations that they must abide by given their *Federal* structure, and in spring 2018 the national body to which they are affiliated enforced structural change that affected the advice provision significantly. *Sierra* has now merged with another branch of the national body, and the majority of informants for this research have been made redundant or left their volunteer post. This has meant some offices have now closed, potentially creating a hole for advice services in the local community and an increase

in demand for other organisations such as *Redwood* (Chapter 6) that is located in a neighbouring community, to fill the gap created by the national body.

4.2 Advice at *Sierra*: The Challenges of Adaptability

4.2.1 The Provision of Advice at *Sierra*

The body of knowledge of the voluntary advice sector is limited, and has been widely discussed in section 2.1 (see, for example: Abbott, 1998; 2007; McDermont, 2013; Kirwan, 2017a). Interviews with *Sierra*, provide valuable insight into the operations and processes of advice-giving at a branch of a *Federal* organisation. Insight into the overall process of the provision of advice was provided during interviews with the manager of *Sierra*, *Emma*. The organisation offers a breadth of advice, as discussed, this is both generalist and project-specific but is also offered on multiple levels, see Figure 1.

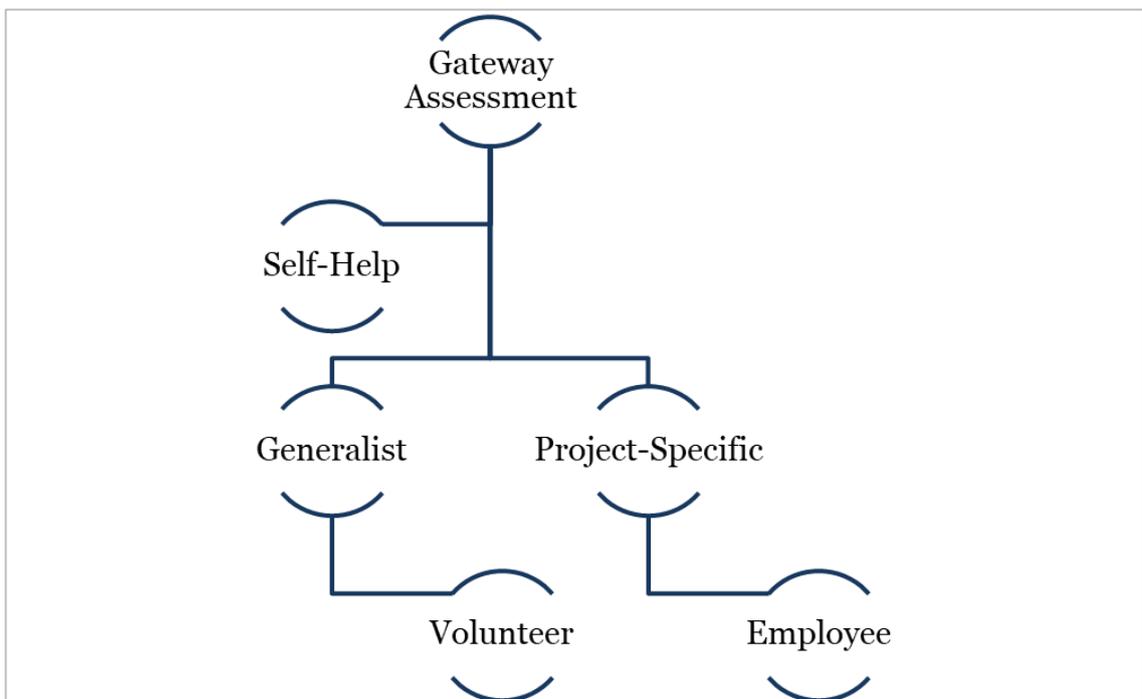


Figure 1: Advice-Giving Process at *Sierra*

During the gateway assessment, a volunteer will gather information to identify the issue, or as was often the case, multiple issues, that the service user requires support handling. This is an important aspect of the advice-giving process as it is understood that in society and in Liverpool in particular, the issues that service users are suffering with are becoming more complicated as a result of social policy reforms introduced by the Coalition and Conservative governments following the Welfare Reform Act 2012 (Organ and Sigafos, 2017). Organ and Sigafos (2017) carried out empirical research with advice organisations and the advisers that work within them in Liverpool. They conclude that the quality of advice is falling, with a growing lack of specialist advisers during a time of growing complexity as a result of the cuts to welfare benefits and resources to advice organisations and the wider voluntary sector. This is particularly important for understanding the process of advice at *Sierra*, with the lack of specialist staff and growing complexity of issues that can complicate access to advice. *Sierra* state that there are multiple advice routes for service users and many of them often have to take more than one line of advice to settle their issue, for example both generalist and project-specific. The individual can see a gateway assessor for general drop-in issues or book an appointment to see a volunteer adviser or a more specialised employee. *Sierra* places a great deal of emphasis on the importance of self-help in order to provide service users, members of the local community, with the tools and information they need to deal with issues themselves in future. Whilst this is a priority for *Sierra*, it is a concern for Organ and Sigafos (2017) who suggest that service users are being pushed towards self-help and online services due to a lack of resources in the voluntary advice sector, a pattern that can often further complicate an individual's issue.

Individuals requiring extra support are often directed to teams of specialist employees working on projects such as housing, energy or debt. This provides specific support for individuals and can be funded from money advice and energy companies, social housing associations or more well-known funders such as the Big Lottery Fund or the local authority. Whilst these projects provide a significant level of support to service users, there is a concern at *Sierra* that the external funding of these programmes is coupled with a number of targets that the project must reach. This

concern has been highlighted during an interview between Bowen-Huggett and Kirwan (2017), Bowen-Huggett is involved in access to justice and advice services and delivered an interview for the study providing insight into the voluntary advice sector in Bristol, a similar fieldwork site to Liverpool, the site of this thesis in terms of deprivation and local authority service cuts (Beatty and Fothergill, 2014; Jones et al., 2016). Bowen-Huggett and Kirwan (2017) expressed that increased expectancy is placed on voluntary organisations, especially those who offer advice to deliver services within the boundaries of the targets set and with provisions in place should the organisation fail to meet those targets. This thesis furthers this knowledge, however, as interviewees stated that whilst targets are a concern of theirs, a more alarming concern is the specific demographics that projects can include and the way in which advice can be altered in order to meet the demands of a funder. For instance, some projects can be delivered solely to service users within a specific postcode or a project can be shifted to utilise different resources such as online provisions in order to meet the targets,

‘You may have to tweak the way that you deliver that project in order to meet the needs of that funder to get the money in’ (*Emma, Manager*).

‘The [name removed] project is for housing association tenants and private tenants...that worker is specifically postcoded to deliver in certain postcode areas’ (*Emma, Manager*).

The emphasis on maintaining the interests and feedback required from the funding provider is shifting the prominence of advice from the needs of the service user. Voluntary advice, on the whole, is offered on a free-to-access basis. It is articulated by Bowen-Huggett and Kirwan (2017) however, that this concentration on the needs of funders could lead to a move towards chargeable services should targets and interests not be met and funding resources lost. This therefore, has the potential to lock out certain demographics of service users that may not be able to afford charged services. Interviewees stated that funding can have a major influence on advice, shifting the focus and direction that advice services can take, therefore extending the argument of Bowen-Huggett and Kirwan (2017). This phenomenon of the shifting of focus and direction that advice services

can take can also be related to both the independence and distinctiveness of the voluntary sector. Macmillan (2015) discusses the ‘cherished independence’ of the sector and Aiken and Harris (2017) and Macmillan (2013b) some of the distinctive characteristics of the sector. Civil Exchange (2016), publish the annual report from the Panel on the Independence of the Voluntary Sector and declared that there are similarities between the voluntary and private sectors, as well as a growing blurring of boundaries between the delivery of services from voluntary and private organisations. Therefore, the interests and needs of private funders as a main concern for voluntary advice organisations, in this case *Sierra* whose projects are funded by private energy companies for instance, can lead to a lack of voluntary independence.

Aiken and Harris (2017) have provided a recent dialogue on distinctiveness for small and medium sized organisations, a concept that is important for this thesis and for *Sierra*, who are medium-sized and display signs that their distinctiveness is being eroded. Interviews revealed that many of their efforts are concentrated on the needs of the funder, therefore some of their local emphasis and local knowledge is being bypassed. Macmillan (2013b) argues that a convoluted distinctiveness occurs within the sector as well as across it as a whole. This thesis is concerned with the differences between types of organisations within the sector. For *Sierra*, this manifests itself in being affiliated to a national charitable body and being able to offer the recognised brand and services that this brings compared to other advice services in the area, such as the *Local* organisations discussed in section 7.2.1. However, the increasing lack of local focus at the organisation is creating a lack of distinctiveness from other branches of the national body as it is becoming more difficult for the organisation to offer community-led projects and advice.

4.2.2 Employees and Advice-Giving on Projects

To build a picture of *Sierra* as an organisation and further understand the importance of organisational type and the differences between the case study sites (discussed in Chapter 7), it is important to understand the role of employees in advice-giving at a voluntary organisation. This exploration will also assess the foundations for employees’ relationships to service users,

the local community and social policy reforms, which are at the forefront of this research. The specific projects that employees are involved in differed greatly between the participants, and include financial capability projects, pension, and energy as well as specialist debt projects.

Despite the challenges for the provision of advice that can be involved in the relationship with funders, this thesis argues that voluntary advice organisations, such as *Sierra*, have the ability to formulate prosperous relationships with local authority services. Employee *Jennifer* oversees an advice project dedicated to GP surgeries, allowing members of the community who may not have previously been aware of the organisation to gain access to the advice services without travelling into the advice centre. This highlights the broad range of advice that *Sierra* can provide and supports the research of Jones & Meegan (2015) that found Liverpool voluntary organisations have the ability to build strong relationships with the local authority. Two further projects at *Sierra* are provided through government contracts and are offered by all *Federal* branches of the national body; *Jennifer* also oversees the advice and guidance for the pension's contract and a large-scale project relating to energy usage and costs. The final project is related to the social policy reforms that are affecting many of the service users and the wider community. It relates to personal budgeting and support and is solely dedicated to service users who have been referred from the Department of Work and Pensions as they begin to claim Universal Credit and are able to access additional support from *Sierra*. These projects are part of the national body, it can be concluded that although these are appropriate for the needs of the local community, there are specific requirements that alter the process of advice giving.

Employees are dealing with a mass of complex issues that the service user often brings into the advice centre at the same time, a concern further addressed in sections 2.3.1 and 6.6.2. This leads to a drawn-out process of interviews and advice sessions, with a client repeatedly using the organisation until their services are long required. Employees identified this as an urgent issue as they feel they are no longer able to provide advisory services at a comfortable rate. This is concurrent with some academic literature (Kirwan, 2017a; Organ and Sigafos, 2017), stating that pressure on the voluntary sector, their services and resources is increasing. For instance,

Alcock et al. (2012) state that there was, and arguably continues to be, pressure from the government for an increase in third sector involvement in public service but question the provision of resources that will allow this to occur as it is not accounted for in the statutory discourse. Chapman (2017), argues that there have been significant changes to the flow of financial resources, voluntary organisations are often aiming to provide services that utilise more resources than what is available to them, for instance, staff and funding. This argument culminates with the view that government funding and resources for voluntary organisations have diminished, which places organisations that can be dependent on this funding in a difficult position (Milbourne and Cushman, 2015). Therefore, this declining availability of resources with an increased pressure for services that is occurring at *Sierra* could be detrimental to the organisation as they find they have very little assistance from the national body in tackling these organisational issues. Despite their prosperous relationship with the local authority, *Sierra* have experienced a significant reduction in local authority funding in recent years,

‘They [local authority] have a three-year programme where the funding we got the following year would be reduced by 50% and then the third year another 50%. So if you looked in comparison a few years ago I think we used to get about £233,000 from the local authority to run three offices per year, that then was capped a couple of years later to £200,000 so that would be the maximum any voluntary agency would get in the voluntary sector, and I think at the moment now we’re down to, I think it might be around just over £60,000’ (*Emma, Manager*)

‘We lost all of our specialist welfare rights workers so that was a massive resource, not only for clients to be able to have that service but also the skills that those staff have, the experience’ (*Emma, Manager*).

This reduction in funding from the local authority has meant that when project funding ends, the organisation is unlikely to be able to sustain employee contracts to transition onto a new project. This can have detrimental effects as not only is the organisation losing resources in terms of

employees, but service users can also miss out on necessary knowledge regarding their situation and the organisation as a whole.

4.2.3 Voluntary Advice

Volunteers carry out a great deal of the work in voluntary organisations (Musick and Wilson, 2008; Rochester et al., 2010). This is especially prevalent in the voluntary advice sector, despite the challenging role that volunteers undertake (Kirwan, 2017a). This thesis demonstrates that the act of advice-giving is complex at *Sierra*, as well as the issues presented by service users. At *Sierra* there are multiple levels of volunteers and staff who all operate in different ways, however, it is the volunteers that deal with the initial inquiries and the main issues that are covered by what *Sierra* term the 'general unit' including welfare benefits. A significant pressure is felt by the organisation as the 'general unit' is provided solely by volunteers. A feature of the interviews was the importance of the general unit, whilst interviewees were aware and appreciative of the work carried out by the employees, they were also concerned that this was only available for service users who met particular criteria. For service users who did not meet these criteria, they were reliant on the general unit, arguably creating increased demand for this service.

Furthermore, the cohort of volunteers at *Sierra* are experiencing changes to how they provide their advice. This has been brought about by the consistent changes to benefit regulations and alterations to the process and complexity of benefit applications and appeals. For the volunteers at *Sierra*, this has had a significant impact on the demand for assistance in completing forms for disability benefits, especially surrounding the move from DLA to PIP. This finding has been discussed in an independent assessment of PIP, in which it was concluded that the experience of the move to PIP for claimants has been unsatisfactory when compared to the forecast provided in the Welfare Reform Act 2012 (Gray, 2017).

‘I’m just doing forms, I know what they're coming in for...It’s either PIP or ESA, it depends. At the moment, there's been quite a lot of ESA forms being filled’ (*Jane, Volunteer*)

‘Basically, it’s form filling...PIPs, ESAs, stuff like that’ (*Simon, Volunteer*)

‘Personal Independence, even for me, takes about an hour and a half to complete the form. So, you can imagine perhaps, a person with some minor learning difficulties, or who has not really got a grasp of English grammar, or whatever, they could be hours filling one in. So, you come in, so you do that for them’ (*John, Volunteer*)

These changes not only cause direct confusion and inconsistencies for volunteers but also influence the relationship between the volunteer and service user, a theme that is further discussed in section 4.5.3. This is of importance to volunteer advice as the advice interview can often be clouded by the complications of a service user's situation, as they often have to make multiple trips to the organisation in order to deal with their issues, which can also be difficult for volunteers to manage,

‘I always thought you needed a degree or some expertise or qualifications to do this job because it’s very involving because it’s casework’ (*Phillip, Volunteer*)

For volunteers, they not only have to unpack these details but create detailed case notes for other members of the advisory team who may be simultaneously assisting the same service user within these trips.

4.3 Employees at *Sierra*

4.3.1 Motivation for Employment

Employees at *Sierra* provide an extremely important role for the organisation, according to both manager *Emma* and many volunteers. Knight (1993) stated that *Federal* organisations, such as *Sierra*, often operate with a hierarchy of employees and volunteers a notion that is commonplace across many voluntary organisations (Musick and Wilson, 2008). McDermont (2013) has highlighted the significant roles of employees at Citizens Advice, a growth that occurred under New Labour and the heightened delivery of public services through the voluntary sector.

McDermont (2013), whose research is grounded in Citizens Advice and legal justice argues that employees within a voluntary organisation that provides advice are not to be viewed as inferior to the advice that is offered by solicitors, but that they can 'perform a different, more complex role' (2013: 222). This finding was solidified in this thesis as it was found that employees at *Sierra* provide advice on specific issues, also ensuring that resources are available for volunteers and service users, including knowledge and signposting to information as well as support on difficult and complex cases.

Specific themes of advice are becoming more important as issues become increasingly complex and multifaceted and it has been noted that the availability of voluntary advice is in decline (Organ and Sigafos, 2017) (further discussed in section 7.2.1). This thesis highlights that specific lines of advice build a requirement for specialist employees in voluntary advice organisations. This is synonymous with McDermont's (2013) research with Citizens Advice that stated the role of specialist staff in voluntary advice organisations is a result of the increase in contracting from the government. This is related to the driver of change of political forces, as stated by Kellock-Hay et al. (2001) and Cameron and Green (2015), as it is evident that movements from government decisions such as contracting can influence voluntary advice provisions.

Interviews at *Sierra* highlighted that projects such as those based on financial capability and housing tenures allowed employees to gain skills through the specialist project. These employability skills ensured that employees are not only up to date with the work carried out on projects, but also highlights the concern that project work is flexible and susceptible to change,

'To keep yourself up-to-date so the clients are getting the relevant information and you're making yourself employable still' (*Julie, Employee*).

This finding articulates the concern around the loss of projects and funding schemes; project work, therefore, allows employees to ensure that they remain employable in the labour force particularly within the current era of austerity and increasing level of uncertainty in the voluntary sector.

This thesis provides an opportunity to further explore the theme of employees in voluntary advice organisations and their skills for employability. This is connected to the findings of Levitas (2012), alongside the reduction of public spending, one of the most significant results of austerity was the job losses that occurred throughout England, a movement that not only reduced local authority services but also local authority spending power. Employees at *Sierra* were aware of the current precarious political and social economy and were therefore interested in ensuring that they were employable should their contract with *Sierra* come to an end. Further to this, employees were aware of the issues that were being brought into the organisation and therefore able to build personal skills around how to navigate these in the future, both for the organisation and for themselves.

It has further been discovered that Liverpool was one of the hardest-hit during the era of austerity and social policy reform, as an older-industrial city whose labour market had already been in decline (Beatty and Fothergill, 2014). This thesis, therefore, demonstrates that for employees, as well as volunteers, their role in a voluntary advice organisation is becoming more pressurised due to social policy reform as they are aware of the fast-paced change in the voluntary sector and the turmoil surrounding funding and advice-giving projects at *Sierra*. Despite this, the amount of time that each employee had dedicated to the organisation was extensive across all employee interviews, ranging from 9 years to 17 years of employment. *Jennifer* has held a number of roles within the organisation, as funding cycles have taken her from one role, she has moved into another. This has allowed her to gain experience and witness changes throughout the organisation, now leading her to be the project coordinator of four projects. All of the employees stated that their experiences both inside and outside of the organisation had fed into the advice provision they are now involved in in a positive manner,

'A lot of things around projects are things like quarterly reports and collecting stats and those kinds of things they remain the same but then what happens is you have this other set of tasks which broadens the role and you find you jump around a lot more which in some ways is quite nice' (*Justin, Employee*).

This can further the knowledge provided by Doherty et al. (2014) who argue that social enterprises, rely on incentives that are not financial to motivate employees, including job satisfaction and the knowledge that their work is providing contribution to community development. This thesis similarly demonstrates that voluntary advice organisations can provide a number of experiences on different projects dependent upon the demand in the community and society as a whole, and the skills that employees can gain from this can be extremely positive.

4.3.2 Challenges for Employees

Whilst the team of employees is integral and exceptionally important for the organisation, maintaining the services provided by employees is not always straightforward. *Emma* described the times in which the organisation has thrived with employees; services have been delivered effectively with minimal waiting times and multiple projects available for service users to take up. However, there have been reforms to those services, largely due to funding restrictions that have resulted in specialised employees being lost. The biggest example recorded is the loss of a specialist welfare rights worker, a notion that is drawn upon in subsequent sections of this chapter (particularly 4.4.3) as it affects the whole of advice provision at *Sierra*. This has created an expansive workload for the volunteers and advice session supervisors who make up the general unit, as they no longer have the specialist skill-set to draw upon.

Taking up employment in a voluntary organisation can be complicated, with the motivations for doing so and the experiences gained being vastly different for individuals. Furthermore, the role of employees on specific projects is crucial to the well-being and sustainability of the organisation as the issues that *Sierra* deals with become multifaceted and require specialist advice. This thesis argues that motivation for working in a voluntary advice organisation is largely philanthropic (Cunningham, 2001; Nickson et al., 2008) and despite the structured hierarchy of advice giving at *Sierra* (see Figure 1), the working environment remains inclusive,

‘I thought I’d go into [*Sierra*] so went in as a volunteer and after the experience been the client, I volunteered for about 18 months and got paid work from it’ (*Julie, Employee*)

‘Well I enjoy helping people, and I enjoy working in the community you know assessing people who are possibly vulnerable, people who are not capable of dealing with their affairs and need extra help’ (*Marie, Employee*)

‘I think I’ve always worked in community type voluntary relations, I think I just prefer the ethos of it I’m not very, I’m not a corporate person. It is something I’ve always chosen, I don’t think it was an active choice I think it was just something I was always going to do’ (*Jennifer, Employee*).

4.4 Volunteers at *Sierra*

4.4.1 Motivations for Volunteering

Evidence in the existing literature establishes that there can be fluctuations in trends of volunteering particularly during times of intense social changes (Rochester et al., 2010; Dallimore et al., 2018). The same can also be said for voluntary advice organisations, as researchers have found that there appears to be a lack of volunteers for advice services (Kirwan, 2017a; Organ and Sigafos, 2017). This has been associated to the volunteers at Citizens Advice taking on a difficult role as a ‘translator’, which requires a specific skills set, as well as the complexity of caseloads that occur at voluntary advice organisations such as this (McDermont, 2013; Kirwan, 2017a). Therefore, motivations of volunteering were investigated at *Sierra* in order to address and understand the process of advice at the organisation and address the following research question (further explored in Chapter 7):

- I. How do different structured voluntary advice organisations experience social policy reform?

As well as this, the conversations that were held with volunteers around their motivation for volunteering allowed the further exploration into the differences in experiences between hierarchies that exist in *Sierra*. Musick and Wilson (2008) have established that it is important for sociologists to distinguish between the reasons why people volunteer, their motives, and the

opportunities that allowed them to do so 'people consistently rank volunteer activities based on the "purity" of their motivation...volunteering was a good example of virtuous behavior' (2008: 55).

Musick and Wilson (2008) use functional theory to demonstrate that individual acts through a specific activity, such as volunteering or in the case of *Sierra* advising, can provide important psychological functions for the person carrying them out. Conversely, in a large-scale discourse of volunteering in the 21st century, and the motivations to do so, Rochester et al., (2010) concluded that advice services are largely provided by informal volunteers such as those who provide unpaid help to friends and family. Whilst this thesis is not primarily focussed on volunteer motivations, it offers insight into the motivations for volunteers at advice organisations for instance, value, protection and career, as organisations are once again excluded from the wider voluntary sector rhetoric. In order to understand the operation of advice-giving at *Sierra* and the relationship volunteers can have to service users and social policy reforms, it is imperative to explore the background of the volunteers, the experiences and the motivations that led each individual into volunteering at *Sierra* (Table 4).

Volunteer	Background & Motivation
John	Previous employment in the public sector, working in the civil service for over 36 years. John now advises on issues that relate to this previous work.
Paul	The skills needed to provide voluntary advice such as information gathering is something that had been a large aspect of his previous role as a solicitor.
Jane	Jane has been a volunteer with the organisation for many years; she has entered employment but recently returned to the familiarity of this volunteering role.
Simon	Volunteering for <i>Sierra</i> for 5 years, Simon had previously been a mathematics teacher for 38 years before retirement.
Barbara	Barbara had also been a teacher and had used those skills with people and managing personal situations to transition into a volunteering role post-retirement.
Lee	Before taking up his volunteering role, Lee had been involved in caring duties for his family. Lee had also involved being a benefit claimant and so used this knowledge in his role of adviser.
Paula	Paula's previous employment was around a community provision of childcare, criminal law is a pastime of the volunteer that feeds into the advice-giving role.
Martin	Martin had been in paid employment for many years but had removed themselves from the employment due to mental health issues and began volunteering.
Sheila	Sheila did not share any previous employment details, referring to herself as being at home for many years before joining the organisation.
Phillip	Previous roles, both in a paid and voluntary capacity, working with multiple voluntary organisations across the city.

Table 4: Volunteer Background at *Sierra*

One of the most prevalent themes identified as motivation for volunteering during interviews was the desire to ‘pay back’ to society and to contribute to the community using the skills that the individual had acquired. Musick and Wilson (2008) argue that this motivation can be termed values, this is because individuals are volunteering to achieve their desired goals. This motivation is clear at *Sierra*, with volunteers seeking to help their local community with the issues they face in their advisory roles. Interviewees that had identified themselves as being retired or at retirement age, they stressed the importance of feeling that they were doing something useful,

‘To help people understand some of the gobbledygook that comes out from the government’ (*Paula, Volunteer*).

For others, the sense of giving something back to the community was based on the personal experience of the hardships that service users were facing. There was a sense of using these experiences to frame their advice giving and reassure service users that they were not alone in working through their issues. This was a prevalent theme across all interviews, although Morrow-Howell et al., (2014) state that this is more likely for older groups.

Interviews with multiple volunteers, but especially *Martin* were synonymous with the work of Musick and Wilson (2008). They suggest that another motive of volunteering is protective, referring to voluntary activities that allow individuals ‘to deal with inner conflicts, feelings of incompetence, uncertainties about social identity, emotional needs, and the like’ (Musick and Wilson, 2008: 62). This literature suggests that *Martin* and others at *Sierra* volunteer in order to deal with inner conflicts and to support their own health and well-being,

‘Came to volunteer, basically as a way to try and keep me occupied for my own mental health and a route to gaining new skills’ (*Martin, Volunteer*).

Volunteers *John* and *Paul* both stressed the importance of volunteering in an area they were familiar. They had both obtained the advice-giving skills required for a voluntary advice role from their previous employment. Therefore, they both shared that they were keen to enter into a

volunteering role that would use their skills as opposed to having to retrain. On the other hand, other volunteers articulated that an advisory role was an opportunity to acquire new skills. These findings can be related to the notion of career motives from Musick and Wilson (2008). It is suggested by the authors that volunteers can conduct voluntary activities in order to gather career-related skills and benefits. It is suggested elsewhere in the extant literature that the gaining of new skills for employability is related to low retention in the voluntary sector due to the prospect of outside employability and troubled times for voluntary organisations, especially for younger volunteers who make up a large aspect of the general volunteering community (Anderson and Green, 2012). Research within this thesis and chapter in particular, therefore, highlights that volunteers do gain new skills, but often apply these to their volunteer role to enhance the experience for service users.

4.4.2 Advising for the Community

The organisation and their advice-giving process were incredibly important to all of the volunteers, undoubtedly influencing their dedication to the organisation. Volunteers shared their thoughts on the importance of the advice that was provided by the organisation and the significance this holds for being one of the few remaining organisations that continues to offer free voluntary advice. It was elucidated that one of the main reasons for this significance was the trust that the public has for *Sierra*. Although the organisation is affiliated to a national body, volunteers felt that they had a unique opportunity to avoid conflicts of interests between service users and government bodies. This is because the organisation has independence from the government and other public sector agencies (Civil Exchange, 2016), a phenomenon that is widely discussed (Lewis, 2005; Macmillan, 2015; Egdell and Dutton, 2017). It is argued that the voluntary sector and state operate alongside each other with an interdependent relationship as the voluntary sector maintains its ‘cherished independence’ (Macmillan, 2015: 104).

This chapter reveals that the amount of time that *Sierra* has been established, both in its national form and in the local community has led to it being a household name that service users recognise.

Sierra argues that this has led to an increase in demand for advice during times of austerity, given the continued level of deprivation in the Liverpool City Region (Department for Communities and Local Government, 2015),

‘[*Sierra*] has built a reputation for providing high-quality advice, getting things done, fighting for people’s rights’ (*Martin, Volunteer*)

‘It [*Sierra*] empowers people, it helps people’ (*Sheila, Volunteer*).

This is an unexpected result in consideration to literature provided by Aiken and Harris (2017) who state that small and medium-sized organisations are being ‘hollowed out’. This refers to the movement in which many small and medium-sized organisations are shifting their focus from the provision of local services to those that are more mainstream in order to adhere to government expectations of society and the voluntary sector. Whilst *Sierra* has streamlined some of its services, and is arguably dealing with the most amount of mission drift in comparison to the *Local* organisations involved in this research (see section 7.1.3), the responses from volunteers demonstrate that *Sierra* as a medium-sized organisation continues to hold the values of local citizens and the local community at its core.

The relationship that volunteers had with service users was also highlighted as being important to the advice-giving experience for volunteers. Volunteers articulated that there are many variables that can affect the advice-giving process, not just the issue that the service user brings into the organisation. For instance,

‘The average waiting time’s probably an hour, an hour and a half. It’s not good for the clients and obviously, their attitude changes possibly when they’re waiting’ (*Lee, Volunteer*).

‘It’s very difficult, you interviewing somebody and they’ve got nothing and you’re referring them to a food bank’ (*Paula Volunteer*).

These findings demonstrate that the relationships built between the volunteer and service users are important but can be challenged by the complex-advice giving process. The complex nature of issues and the number of issues that are often presented in advice sessions creates more pressure for volunteers in recent years, particularly following the social policy reforms such as Universal Credit and PIP. Whilst there is a growing pressure for volunteers, from the sensitive issues presented and the increased waiting times, interviewees shared that this can also reaffirm their feelings of gratification from providing voluntary advice. Organ and Sigafos (2017) stated that it is important for organisations to be able to deal with growing complexity, this research also shows that it is important for volunteers to nurture their relationship with the organisation they are involved with and the community that they advise. This is of particular importance in order to avoid losing rapport that has been built at the organisation and the destabilisation of the relationships between the organisation and the community.

4.4.3 Challenges for Volunteers

The volunteers are paramount to the advice and overall running of *Sierra*, however, the availability and cohort of volunteers is changing

‘Volunteers are the backbone of this organisation...Restrictions on job seekers looking for jobs and employment support allowance, it’s harder now to actually recruit and retain a core group of volunteers’ (*Emma, Manager*).

‘Many of the volunteers we have are often people who have retired or people who are in a bit of a more fortunate position where they don’t have to look for work’ (*Justin, Employee*).

At *Sierra*, the core group of volunteers is now made up of more mature volunteers who have retired from their profession, as well as a fast-changing cohort of students that are aiming to gain experience in an advisory or voluntary capacity for future careers. This is concurrent with academic literature that suggests student groups often volunteer for short periods of time to build

skills (Anderson and Green, 2012). *Emma* stated on multiple occasions that the construction of the volunteer cohort is different within recent years. This was revealed to be due to the limited availability and situation of volunteers, especially in a precarious economy that requires attendance at paid employment with little advance notice. Volunteers also highlighted the issue of recruitment and retention as the low number of volunteers was consistently increasing their workload. This highlighted how the stressful and difficult nature of voluntary advice can discourage some volunteers who do not have a background in similar areas. With volunteers elucidating the negative impact this has for the organisation, stating that

‘The morale of the volunteers has gone down’ (*Lee, Volunteer*).

‘Our clients suffer every time and it’s very difficult’ (*Paula, Volunteer*).

These findings of the changing cohort of volunteers can be further related to wider studies. The trends of volunteering are associated with a conflicting debate, as discussed by Dallimore et al. (2018). They argue that there is some evidence to suggest that volunteer cohorts are susceptible to change with movements in social change, with other data in the study revealing that long-term volunteering is steady. Despite these contradictions, it was concluded from their mixed-methods investigation on place and belonging for volunteers that there has been a loosening of bonds between volunteers and where they volunteer, with a growing number of voluntary activities taking place to benefit communities are carried out by volunteers that reside outside of the area (Dallimore et al., 2018). This finding also accompany arguments provided by Costello et al. (2017), as they argue that there has been a change from a 'traditional', regular volunteering to voluntary action that takes place in 'short bursts' (2017: 300). A further argument, one that corresponds to that of Dallimore et al. (2018) is that a volunteer is more likely to volunteer if their mission and values fit with those of the organisation (Costello et al., 2017). Therefore, if there are significant social changes, the mission and values of an organisation may also change, which can alter the make-up of the volunteer base at a particular organisation. These arguments can be applied to this thesis, as it was found that with the uncertain economy and fast-paced social policy

reforms that *Sierra* is encountering, their volunteer base is also uncertain and susceptible to fluctuations.

The increase in demand for the service has put a pressure on volunteers who are generalist advisers to support the gateway assessment (refer to Figure 1). The lack of gateway assessors means that advisers must be on hand to ensure that service users are seen promptly and their waiting times are not too excessive, an issue that was important to volunteers when assessing their advice-giving experience. This pressure along with the repetitive nature of the volunteering, particularly with the increasing need for form filling has led to some volunteers witnessing a fall in volunteer numbers. *Martin* articulated that his role as an assessor had become a lot more stressful in recent months than it had been since he started volunteering with the organisation four years earlier, particularly given the lack of a specialist welfare rights employee that would have previously been able to support volunteers. On the other hand, *John* noted that the demand for voluntary advice services had increased on a national basis, and was therefore clear to ensure the best possible advice was being given to his service users. He was aware that other advice organisations were encouraging volunteers to complete up to six enquiries and case reports in each advice session (usually a four-hour period); therefore, he limited himself to two, ensuring that they were completed thoroughly to avoid service users from having to access organisations that are more limiting

‘If a client wants to spend two to three hours with me, it doesn’t bother me...if we weren’t here, I think it would be... I don’t know what. It would be horrible [for them]’ (*John, Volunteer*).

This is in contrast to research carried out with other *Federal* organisations, it is suggested that voluntary advice is increasingly pressurised to be delivered through flexible means, such as online or via telephone (Harris, 2017). However, the ethos for voluntary advice is also fast-paced, with little time to introduce new concepts of advice-giving. This is particularly relevant for previous research that has been carried out with Citizens Advice, concluding that funders have put pressure

on organisations to see an increased number of service users, advisers, therefore, have a reduced amount of time in each appointment (Bowen-Huggett and Kirwan, 2017).

4.5 *Sierra* and the Local Community

4.5.1 Importance of *Sierra* in the Local Community

It is the role of this thesis and this chapter in particular to explore the relationship between a *Federal* voluntary organisation and their local community. This is of particular importance as Liverpool, and the communities involved in this research are in an area of high deprivation and dwindling resources (Beatty and Fothergill, 2014; Department for Communities and Local Government, 2015; Beatty and Fothergill, 2016; Organ and Sigafos, 2017). Community, as defined in section 1.2, is referred to as the collection of small groups, such as neighbourhoods (Delanty, 2003) or in this case the surrounding area and collection of service users at the voluntary advice organisation *Sierra*.

A theme that emerged from interviews with the manager, employees and volunteers alike was the notion that current service users are having difficulty gaining access to free advice. This is arguably due to both reductions in voluntary advice organisations that are available in the local area as well as changes to the individual's situation. *Sierra*, therefore, places a great deal of emphasis on ensuring that the service user is not becoming overwhelmed with their problems. It is part of every employee and volunteer's role to provide the necessary support and to reassure the service user that the organisation will support them through the steps required to resolve their issues. A further concern, especially articulated by *Emma*, but also employees and volunteers, is the severe need for the services offered by *Sierra*. There is fear that if those services were removed from the community and the organisation were to dissolve, the service users would have to travel a significant distance to access free advice or pay for a similar service. This is similar to the findings presented by Organ & Sigafos (2017), although their research is largely framed around

Legal Aid reforms, they state that there is a significant need for support from agencies that are unfortunately being removed.

Sierra has received these concerns from service users and has subsequently integrated these into their daily operations, especially when allocating appointments for further advice. Service users especially prefer to gain access to a service that is within their local community,

‘They haven’t got the funds to go and visit the advice centre, it’s too far for them’ (*Emma, Manager*).

Volunteers are arguably at the ‘front-line’ of advice giving at *Sierra*. The responses gathered during the interviews also revealed that they were the most aware of the needs of the local community. Whilst there are a mixture of service users that utilise the services of the organisation, it is also articulated emphasis is placed on providing assistance to those who are vulnerable,

‘There is a lot of vulnerable people out there, there’s older people, people with disabilities, learning difficulties’ (*John, Volunteer*).

An important aspect of providing advice in the voluntary sector was the notion of empowering people; *Marie* stated that she felt the organisation provided a lifeline to the community. This is particularly significant for service users who are dealing with complex debts and told of their relief at sharing their problems with volunteers. Volunteers suggest that they are the building blocks for service users being on the road to resolution. This can also be applied to those who present benefit related issues to the organisation, employees stated that the benefits system is complicated and inflexible and so service users tend to feel stigmatised which leads to some of the issues they bring to the organisation. This finding emerged from the data following the inductive data analysis process adopted (elaborated in section 3.9). Findings relating to stigma were not a deductively executed line of enquiry, with participants not being directly asked about their experiences and relationships with service users that they identified as being stigmatised.

Therefore, it remains a nuance of the volunteer participants that offered information regarding this through the conversational method used.

The narrative provided by volunteers signifies that individuals can experience institutional or claims stigma, which contributes to the work carried out by Baumberg et al., (2012) and Patrick (2017a) who have carried out significant studies around benefits stigma and identified multiple levels of stigma that an individual can experience. Baumberg et al., (2012) conducted a robust mixed-methods study and argues that institutional stigma is present for many individuals that claim welfare benefits. According to the group, there are two ways to escape institutional stigma; first through solidarity in which an individual can gain recognition and justification of needing benefits. Secondly, an individual must be viewed as gaining the right to financial support from the state. Similarly, Patrick (2017a) argues that claims stigma exists, this is similar to Baumberg et al.'s (2012) study, as it is elucidated that claims stigma arises through the benefits claiming process as it is dehumanising and alienating. Therefore, stigma makes people feel uneasy about claiming benefits, and it was found that a number of individuals would prefer to manage on their own. This research supports these claims, as interviewees at *Sierra* stated that their service users report similar feeling to those identified in these studies, that the process of claiming for benefits is alienating. However, the arguments proposed by Baumberg et al. (2012) and Patrick (2017a) do not highlight the organisations that support individuals in escaping from institutional or claims stigma. By identifying this phenomenon at *Sierra*, it is also clear that they go some way in helping individuals overcome benefits stigma.

4.5.2 Deprivation and the Demographic of Service Users at

Sierra

The services provided by *Sierra* are particularly important in providing the local community with the tools they need to access information on their rights and in receiving practical help. The offices are based in some of the most deprived wards in the country. Recent statistics from the Multiple Deprivation Indices correspond with this as they state Liverpool is the fifth highest

district in the country for having wards in poverty (Department for Communities and Local Government, 2015). Therefore, when reflecting on the service users across the three offices it was surmised that,

‘A lot of them are in receipt of benefits, we see a lot of clients who are in receipt of sickness benefits, disability benefits, lots of health issues, alcohol and drug dependency, obviously, a lot of our clients are tenants and not necessarily homeowners’ (*Emma, Manager*).

Large-scale advice organisations that act as both supporting bodies for voluntary advice organisations and those that are a household name with a presence in many communities can support these results. For instance, Advice UK and their membership organisations dealt with approximately two million requests for help with the fifty poorest and most vulnerable groups in the UK (Advice UK, 2018). Citizens advice also offer a significant amount of advice, with their most in-demand resources being around issues of benefits and tax credits, debt and housing respectively (Citizens Advice, 2018b).

All employees were keen to state that there was a mixture of clients using the organisation and that *Sierra* was open and inclusive, aiming to deal with all enquiries. However, there was an emphasis on the disadvantaged people that the organisation worked with, showing the importance of the service for the local area. This was due to an increase in demand from service users who were on low incomes, part-time and zero-hour contracts and the issues that these situations created. Additionally, it was noted that there had been a change in the demographics of service users in recent years. This highlights the severe need for voluntary advice organisations in local communities and the importance of ensuring an organisation is sustainable and meeting the needs of the service users

‘We’re seeing a lot more people who are working full-time and part-time, we see a lot more homeowners, we see more younger people and older people than what would

have been the typical client group that we were seeing 10 years ago. We have seen a lot more people from different backgrounds' (*Julie, Employee*).

The notion of stigma can be applied to the issues that service users present and the needs of the community. A stigma of being in receipt of benefits was identified across the organisation and also on specialist projects. For instance, individuals on the LGBT project had often experienced to have underlying issues such as

'Mental health or physical health problems or they have had some kind of breakdown situation, drugs or alcohol [issues]' (*Justin, Employee*).

This idea of stigmatisation has been researched in the academic field, the arguments of which can be applied to the findings presented here (Baumberg, 2016; Patrick, 2017a; Reeves and Loopstra, 2017). Patrick (2017a) suggests that stigma and shame are closely associated with an individual's receipt of benefits and the poverty that can also be coupled with this. The recent social policy reforms have led to the conditions of some benefit entitlement to become more stringent than it previously was. The subsequent consequences of not meeting these reformed conditions can heighten the likelihood of stigmatisation and entitlement (Reeves and Loopstra, 2017). Whilst stigmatisation is being highlighted, there is no mention of how these individuals deal with this stigma. Findings presented in this chapter suggest that individuals are relying upon voluntary advice agencies to help complete forms and mediate experiences with government agencies.

4.5.3 Sierra and Relationships with the Local Community

The relationships that organisations build with the local community are crucial, especially in terms of recruiting volunteers and the well-being of an organisation. Volunteers have invested interests in their local communities which is reciprocated by the community through a loyalty to an organisation (Rochester et al., 2010). Volunteers suggest that use of the voluntary organisation is due to its useful location and reputation within the local community

‘They [service users] trust [*Sierra*] when they will not trust other people because our main thing is confidentiality’ (*Paula, Volunteer*).

There can, however, be drawbacks to having a voluntary advice organisation that is such a prevalent part of the local community. The organisation is aware that there are clients who prefer to travel further afield to the *Sierra* offices in order to avoid gaining advice in their own community. This can be due to avoiding members of their community from observing them entering an advice centre or to avoid meeting employees and volunteers who they may have relationships with outside of the advice organisation.

The continuation of communitarian politics since the introduction and demise of the 'Big Society' is an important factor when considering relationships between organisations and their communities. Pattie and Johnston (2011), in a study of the 'Big Society' argue that community relationships can be associated to social capital that communities will thrive with increased levels of interaction and involvement from its citizens. Whilst the study is focused on the 'Big Society' the findings can be used to demonstrate the importance of relationships between voluntary organisations, their community and each other as communitarian politics continues. The voice of voluntary organisations in more deprived neighbourhoods can be ignored in terms of actioning social change and campaigns for their service users and the wider community (Buchroth and Hetherington, 2018). As a result, voluntary organisations become placed in a paradoxical position and funding cuts to deprived communities have been some of the worst. Voluntary organisations, therefore, have to maintain relationships between other organisations in the community to promote mergers if necessary, whilst also competing with these organisations for funding streams (Buchroth and Hetherington, 2018). The ideals of the 'Big Society' and wider communitarian policies demonstrate that increased interaction and involvement in community activities and promotion of community relationships will be more likely in areas of high social capital, rather than areas that have high levels of deprivation (Pattie and Johnston, 2011). The findings presented throughout this chapter, therefore, dispute these academic claims, especially as interviews revealed that service users are proactive in travelling to other communities that can be more

deprived, to access voluntary services. The notion of community is important to the operations of a *Federal* organisation, especially for recruiting volunteers and relationships with service users. With this in mind, the relationships that are built with the community allow this voluntary advice organisation to address and help individuals overcome stigma. These results demonstrate that voluntary advice does not solely occur in areas of high social capital, it is clear that individuals travel to often more deprived areas to gain advice.

4.6 The Drivers of Change

4.6.1 Funding Provisions at *Sierra*

A significant discussion of the first two drivers of change, political forces and funding, their implications on *Sierra* are considered below and in section 4.6.2. The final driver of change, the evolving architecture of the voluntary sector remains prominent, however the experience of how the roles voluntary organisations have changed and adapted over time is compared with all three case study sites in section 7.3.2.

Funding for the voluntary sector is complex, especially during times of austerity (Lowe, 2017). This is not unique for *Sierra*, who have experienced significant turmoil in funding patterns in recent years. This thesis demonstrates how the impact of funding and changes can alter the process of advice giving and therefore the sustainability of advice services. Whilst *Sierra* undoubtedly provides a significant service to the local community, helping people manage their debts and stay in their homes, *Jennifer* stated that the provision of advice is becoming more difficult. When she originally started with the organisation, there was an abundance of monetary income and resources,

‘There was generally something you could send them [service users] to, something you could offer them, that’s not there anymore so it’s become more and more difficult’
(*Jennifer, Employee*).

This has created a need for more dynamic means of funding, in order to keep the generalist unit running for the needs of the community. The funding cuts and revisions to the service are creating pressures for the organisation that can be felt across all of the levels of staff, the organisation is being expected to constantly adapt its advice and deliver greater services with fewer resources.

One of the most important and time-consuming aspects of the managerial role within *Sierra* is keeping abreast of the funding for the organisation and the implications this has for the delivery of advice. Advice is provided through 14 to 15 different strands of funding. It was articulated by interviewees that despite these conversations with the service users revealed that the local community believes that local authority funding is the biggest funder of the organisation, which used to be the case. However, the majority of funding now derives from grants, trusts and lottery-funded projects. In instances where funding is provided by the government, some of this derives from central government and is distributed to the national body and a small amount is given by the local authority. This is just a fraction of the funding, with most of the advice given being delivered on a contract basis. This is concurrent with research carried out by Jones and Meegan (2015) that suggests that local authority funding has significantly reduced. As austerity measures were introduced, between 2010 and 2011 and 2011 and 2012 there was a £1.3 billion reduction in funding for the voluntary sector, a higher percentage than government spending cuts nationally (Jones and Meegan, 2015). Despite this, the authors found that organisations that operate in deprived areas are more likely to receive local authority funding. This research, therefore, provides paradoxical results as the local authority funding for *Sierra* has been significantly cut from their annual income.

Funding for the voluntary sector, therefore, remains a major issue, especially for voluntary advice organisations that are advising on issues connected to public sector spending reviews and cuts (Bowen-Huggett and Kirwan, 2017). This is arguably a greater loss for the voluntary sector due to the injection of funding and state support that was observed during the New Labour years following the Compact and increased concentration on the partnership between the two sectors (Davies, 2011) (further discussed in section 2.3.2). Therefore, voluntary advice organisations are

being affected by a loss of funding as a result of cuts to the voluntary sector budget in general, but also following the significant reduction in the availability of Legal Aid funding in recent years, often a substantial funder for voluntary advice organisations (Kirwan, 2017a; Organ and Sigafos, 2017).

4.6.1.1 Challenges of Funding

The reasons behind funding being such a big part of the managerial role for *Emma* is to not only secure projects but also maintain these once they have been launched within the organisation. They are often designed to meet the needs of the local community and the loss of funding can be devastating for those who have become dependent on the support that the project has provided. Whilst there are very often specific targets or client groups for certain enquiries, funding that has been provided by local grant-giving organisations or lottery-funded campaigns often have the needs of the local community at their centre when setting those targets and restrictions. Demands from funders can disrupt this working relationship

‘I mean there are cuts, funding reviews whatever you call them is a big thing and that lots of pressures on the organisation so we have in the effect fewer staff delivering more services, more for less is what they say’ (*Justin, Employee*)

‘Training new advisers, so I think the lack of funding, or the cut in funding by the local council because of the main government, has really affected the whole morale of the volunteers really’ (*Lee, Volunteer*)

It has been articulated that voluntary advice organisations are often encouraged to alter services, pressure advisers and find new clients for funders. Arguably, it should be the role of the voluntary organisation to concentrate on their work with service user groups, gaining a greater understanding of their advice needs (Bowen-Huggett and Kirwan, 2017).

As there is a level of uncertainty around funding, there are often shifts in the deadlines for which the organisation receives confirmation of funding. This shift means that specific projects that rely

on employees can have shifting pools of funding, employees can be taken off projects and therefore be made redundant, a movement that *Sierra* aims to avoid, which can often result in altering the provision of advice

‘It’s very hard to obtain funding for generalist workers in the generalist unit...obviously in times of austerity now trying to get funding for paid workers is getting harder and harder and that’s to try and deliver specific projects to meet the needs of the community’
(*Emma, Manager*).

This contributes to results by Chapman (2017) as it is argued that an organisation that concentrates too much on funding can experience mission drift. This can ultimately negatively impact their sustainability, a phenomenon that is occurring at *Sierra*. Mission drift occurs when an organisation moves away from its core values or purpose (Macmillan, 2010). This phenomenon is discussed further in sections 2.3.3 and 7.1.3, the latter exploring mission drift for all three case study sites. For *Sierra* however, the concept can be further associated with Bryson et al.’s (2002) work on the geography of almshouses. The group state that the complexity of funding streams, especially from the state can complicate and cast a shadow on the founding values of an organisation that would inevitably result in mission drift.

4.6.2 *Sierra’s* Experience of Social Policy Change Post-2012

This thesis concentrates on the social policy reforms that have been introduced following the Welfare Reform Act 2012. Whilst historical social policy reform has also affected voluntary organisation and the voluntary sector (Alcock, 2010b; Alcock et al., 2012; Macmillan, 2013a), the interviewees at *Sierra* drove the research and revealed that the recent changes regarding Universal Credit, PIP and the ‘Bedroom Tax’ are most important to their organisation.

Internal changes for *Sierra* that are arguably structured around funding reform, are also coupled with external changes for society in general. As previously mentioned, constraints have been placed on the range of issues that can now be covered under the umbrella of legal aid (MOJ,

2010). These recent restrictions have led to an increase in service users that would have otherwise sought advice at an alternative agency or through a solicitor. This is concurrent with research presented by Sigafoos and Morris (2013) and Organ and Sigafoos (2017), suggesting that the demand for general advice is increasing due to Legal Aid reforms. *Sierra*, therefore, finds itself filling that gap as service users fall back on their services. Similarly, changes to social policy have affected not only the service users that rely on *Sierra* but also to the organisation as a whole. *Emma* states that these changes are not only very confusing for clients but for employees and volunteers alike. As legislation and policies move and change, particularly within the benefits system which is the largest aspect of advice that is dealt with, employees and volunteers must be aware of those changes as they're happening to ensure that the correct advice is being provided and the correct steps being taken to resolve a particular issue.

John highlights that the consistent reforms that emerge from the government make it extremely difficult for service users to understand the benefits system. Volunteers created a connection between the issues that they are dealing with on a regular basis and the cuts to public sector departments. For instance

‘HMRC don’t seem to have enough people to deal with demand’ (*John, Volunteer*)

This leads to consequences for the number of service users depending on the organisation, as they can often be signposted to *Sierra* from these government agencies. These changes also have impacts for the volunteers themselves, which can be associated with previous internal changes. The effect of these internal and external changes together has disastrous consequences

‘Welfare reform has made it harder for people to volunteer. We have a pool of loyal volunteers but we’re really struggling to recruit new ones’ (*Martin, Volunteer*).

A common theme across all of the interviews was the evolving manner of social policy reform, with service users reporting to volunteers living on low incomes following the cuts to public services and welfare reforms. *Jane* stated that the local community need these provisions and the

volunteers and organisation, in general, is there to help these individuals and provide that missing service, a circumstance that sources such as the media can ignore

‘I just think we are a society now that makes people who are vulnerable feel guilty and underhand, I think all this media thing about people on benefits and stuff like that, the programmes...they don’t show the little old aged pensioner who can’t heat the house. It’s always young girls with tattoos, smoking and having 100-inch TVs and whatever’
(*Simon, Volunteer*).

This can often be worsened by those who are not aware or do not understand the changes that are occurring in society, once again this issue was articulated on a number of occasions by volunteers who see this as a recurring theme within advice interviews. This notion echoes the wider discourse of benefits stigma, especially the viewpoint of media shows such as ‘Benefits Street’. Tyler (2015) argues that the issues that lead to stigma in this way are framed as individual issues as opposed to the social, political and economic problems of the country and the government. This is creating a trajectory of blame onto deprived neighbourhoods; however, this is an edited perception and the root of the issue lies with the larger issues of social policy reform and inconsistency.

4.7 Chapter Summary

This chapter has analysed the five key themes that emerged from in-depth interviews with the manager, employees and volunteers at *Sierra* including; *advice, employees, volunteers, community* and *the drivers of change*. The main aim of the chapter was to explore the experience of social policy change for individuals that work and volunteer at *Sierra*, and in doing so has addressed multiple research questions:

- II. What is the perception of social policy reform and austerity measures of managers, employees and volunteers in voluntary advice organisations?
- III. What are the challenges and opportunities for voluntary advice organisations in the current policy context?

IV. To what extent does the local community impact on the provision of advice by voluntary advice organisations?

It is argued as a result of the analysis that has occurred throughout this chapter that *Sierra* is a *Federal* organisation, in accordance with the definitions offered by Knight (1993). The chapter highlights both the advantages and drawbacks of such a structure. The positive impacts of this *Federal* structure surround the reputation of the organisation and the advice-giving resources that are available to employees and volunteers. The affiliation cannot, on the other hand, protect the organisation from both internal and external change, such as funding cuts and the social policy changes that were experienced. Advice at *Sierra* is offered in multiple ways, through the hierarchies of volunteers and specialist employees. Extant literature revealed that funding requirements can shift the vision and focus of a voluntary advice organisation away from the service user and towards more commercial decisions (Bowen-Huggett and Kirwan, 2017) and that mission drift can occur if organisations concentrate heavily on the needs of funders over service users (Bryson et al., 2002; Macmillan, 2010; Chapman, 2017). This chapter argues that the provision of advice at *Sierra* is being tailored to meet funder requirements. This can be detrimental to service users as they sometimes miss out on advice that is focussed to their local needs, with volunteers also taking on advanced roles as they keep up with social policy changes and the changes to the provision of advice in order to meet these funders' needs.

The relationship between *Sierra* and the local community is important to understand, particularly during times of fast-paced social change such as the current context following the Welfare Reform Act 2012. These changes bring about high levels of deprivation and dwindling resources to the community and organisation respectively. It is therefore crucial that *Sierra* maintains continuity in advice-giving, further highlighting the importance of avoiding alterations to the provision of advice as much as possible. Change was a continuous rhetoric that occurred during analysis of all five themes, the changes that are occurring at *Sierra* are synonymous with the drivers of change identified by Kellock-Hay et al. (2001) and Cameron and Green (2015), but in particular funding and political forces. Similar to findings regarding advice, funding reforms

show that mission drift is occurring at *Sierra* as they alter their advice provisions to meet the changing needs of funders. Social policy reforms, such as Universal Credit and PIP are leading to complex systems for service users to navigate which subsequently results in increasingly complicated caseloads and dwindling resources for advisers.

The social policy changes that have occurred following the Welfare Reform Act 2012 in particular have been prominent in all five of the themes discussed throughout this chapter and it is evident that all roles within the hierarchy at *Sierra* experience these differently. This thesis argues that the reason for this difference at *Sierra* is the relationship that each of the roles within the hierarchy have with service users. Volunteers at *Sierra* take the brunt of the social policy changes that are experienced at the organisation because they are at the ‘front-line’ of advice giving and have the closest relationship with the service user with the hierarchy of roles at the organisation. Volunteers demonstrated that they navigate changes themselves, on behalf of the service user and as an active member of the organisation, compared to the manager of *Sierra* for instance. Whilst the manager is aware of the issues of service users, the social policy changes manifest themselves in her role through funding requirement and project organisation as opposed to the community development that is experienced by volunteers. It is therefore clear that for *Federal* voluntary advice organisations, the hierarchies of advice-giving and social policy changes are creating more complex cases, a concept on which this thesis has provided greater understanding.

5 Case Study Site Two – Acadia

This chapter provides a detailed exploration into the voluntary advice organisation *Acadia*, a *Local Providing* organisation by Knight's (1993) typology of voluntary organisations. The chapter aims to build a full picture of the operations and provision of advice at the organisation and how these function within a period of significant social policy change. The chapter commences with an analysis of the overall practices and provisions of *Acadia*, before more detailed explorations of themes that emerged from the multi-level analysis are explored, including *advice, employees, volunteers, community and the drivers of change*. This chapter argues that there are multifaceted challenges for voluntary advice organisations including *Acadia*, as the organisation faces a growing complexity of issues with a lack of resources and uncertainty of funding and structure. *Acadia* aims to provide community development through advice but this makes the advice-giving role for employees and volunteers more problematic and pressured. The key drivers of change (as discussed in sections 2.3.3 and 5.6) are creating more pressures for *Acadia*, as a *Local* organisation, although they are now able to adapt their focus in maintaining meeting the needs of service users rather than funding following their transition to a *Local* structure from *Federal*. The chapter therefore provides an unparalleled insight into organisational change at a time of significant social policy reform.

5.1 The Story of *Acadia* – A *Local Providing* Organisation

Acadia is a *Local* voluntary organisation as defined by Knight (1993) and further discussed in section 1.3. *Acadia* has a servicing action, providing much-needed services and support for the local population. For the purposes of this thesis, *Acadia* will be termed a *Local Providing* organisation, as they provide services *for* the local community. As *Acadia* was previously a *Federal* organisation and has recently transitioned to become *Local*, they still retain some of their structured and corporate tendencies and therefore do not entirely work *with* service users.

As stated, *Acadia* has been previously affiliated to a national charitable body. However, in 2016 this affiliation was detached due to a concern over the number of free reserves the organisation was able to utilise. As these reserves, or available funds, were too low for the requirements of the *Federal* organisation, *Acadia* began offering advice-based services as a *Local* organisation. There were concerns from the national body regarding their sustainability to provide the reputable advice that the national body was accustomed to, however, *Acadia* was keen not to dissolve the organisation fully; being aware of the negative implications this could have for the service users of the local area. They, therefore, transitioned into the *Local* organisation, which although was not without challenges, also held with it several positive aspects concerning advice giving in the voluntary sector. The operations at *Acadia* remain similar to those of the national body, advice is provided in a similar format, and service users have not witnessed a significant change in the operations and receipt of advice. The interviewees highlighted that the shared goals of the organisation allowed them to provide advice in a supportive way; being able to continue offering impartial and non-judgemental services to the individuals in the local community.

As well as the services provided for the local community, the organisation is eager to ensure that their employees and volunteers are fully supported in their roles. Training and updates on social policy, technology and general advice changes are therefore built into a more regular schedule. This is also associated with the move to a *Local* organisation, volunteers and employees alongside service users were the central consideration of the move. Without these teams of employees and volunteers, the organisation would have had a laboured and potentially catastrophic move to the organisation it is today.

5.2 Advice Services at *Acadia*: Increasing Flexibility

5.2.1 The Provision of Advice at *Acadia*

The literature relating to Citizens Advice (see, for example: Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a) is important to consider for this chapter as they provide

an overview of voluntary advice organisations. However, given the transition that *Acadia* has gone through to become a *Local* organisation, findings in this thesis offer an alternative viewpoint. Advice is offered through two systems at *Acadia*, via a walk-in service or through a bookable appointment. Initially, this is with a volunteer who carries out an assessment of the service user's situation and then if required, through an appointment with a more senior adviser or employee on a specific project. Employees highlighted that the organisation had many advisers carrying out differing roles and in different areas of expertise, a positive aspect of advice-giving at *Acadia*.

The emphasis of the initial assessments carried out during the walk-in service ensures that *Acadia* is the most appropriate organisation to aid with the service user's enquiry. This establishes that all service users are helped by *Acadia*, whether they are dealt with by the organisation or signposted to another agency in their network. In most instances, appointments are booked for service users who require the specific advice offered through project-based work. It was revealed by many interviewees that the organisation does not set a limit to the number of service users they will deal with in a single day. This has increased to between 30 and 50 in their current structure compared to 5 to 10 that they would have previously dealt with when they were affiliated with the *Federal* body. This arguably demonstrates that organisational structure has not affected demand at *Acadia*. They are instead able to offer more significant levels of advice as a *Local* organisation and meet the needs of service users that are navigating through the tumultuous policy atmosphere and significant social policy reforms in current society.

It was concurrent across interviews that the main areas of advice that *Acadia* deal with are benefits, housing possession and money advice issues that are also associated to social policy reform, the main focus of this thesis. Many of the employees highlighted that the issues that were brought into the organisation were often interlinked. However, this was particularly highlighted by *Bonnie*, as an employee and project coordinator she witnessed many issues being handled by the housing team including debt, welfare rights and benefits issues. This was in addition to the significant impact of the 'Bedroom Tax' that continues to have an effect on service users, despite

being introduced in excess of five years ago. This is similar to previous research that suggests the 'Bedroom Tax' brings with it a number of significant and long-standing issues as a result of the income reduction. This causes multiple problems for service users such as increases in housing costs, struggles to pay utilities and food bills as well as personal troubles such as the breakdown of relationships and increases in mental health issues (Moffatt et al., 2015).

Volunteers also highlighted this notion of interlinking particularly in terms of benefits and debt. This created concern for volunteers who were keen to relay the difficult situations of the service users and the importance this has on their advice-giving role. For instance, *James*, a volunteer, stated that there has been a rise in requests for food bank vouchers as individuals are no longer able to support themselves and their families on their current income given the confusing benefit changes they were experiencing. This echoes McGovern's (2014) theory of voluntary advice, in which she suggests that volunteer advisers provide a key role in translating the complex issues that service users provide into more simple solutions and then re-translate these to inform policy change and development. This process of translation was noted at *Acadia*, individuals felt that through their advice work, they were able to highlight issues that were important to the community and work with the local authority to influence future development. Although McGovern's (2014) research is based on national based Citizens Advice services, this thesis shows that this theory can also be applied to *Local* voluntary advice organisations.

These findings begin to show the growing complexity of issues that will be further unpacked throughout the chapter, particularly within sections 5.4.4 and 5.6.3. The interlinking of issues is creating a significant issue for *Acadia* and their process of advice-giving as volunteers are having to navigate through multiple, troublesome issues as the first point of contact for service users before the formal process of advice can begin.

5.2.2 Employee Advice-Giving on Projects

The role of employees in a voluntary organisation is a critical debate to discuss in order to understand the process of advice at *Acadia*. Kirwan (2017a) has stated that employees in a

voluntary organisation are able to provide accountability, expertise and support for volunteers. Concurrently, the employee participants in this research provided much-needed support to the organisation as a whole, often offering specialist advice services. For instance, *Peter* was working with a team offering money advice, dealing with the debt issues that were brought into the organisation. It was his role to assist service users with debt issues, reducing their expenses and maximising their income to manage their money in a more successful way. *Joanna* was a member of the housing team based at *Acadia's* court office and dealt with emergency cases that were related to housing and debt. The issues dealt with at the court are usually based around evictions, some of the largest aspects of advice surrounding debts, rent arrears, mortgage arrears and bankruptcy. Employees at *Acadia* demonstrate that advice on specialist projects such as these address the wider implications of social policy reform that cannot be addressed by generalist volunteers. Therefore, social policy reform is affecting the whole of *Acadia* as an organisation. This clearly indicates the importance of employees for a voluntary organisation, as stated by Kirwan (2017a) but also shows the distinctive differences between the services provided by employees and volunteers. These multiple job roles highlight the levels of demand for services at *Acadia*. *Dawn*, an employee, stated that the demand for *Acadia's* services often exceeds supply, even with the move from a *Federal* organisation to independence, both volunteer and employee services remained busy.

5.2.3 Voluntary Advice

It is discussed in the wider literature that volunteers carry out the majority of tasks in a voluntary organisation (Musick and Wilson, 2008; Rochester et al., 2010), this has also been more recently applied to voluntary advice (Kirwan, 2017a). The findings in this thesis support this argument but also show the multifaceted role of being a volunteer at *Acadia* and how this role is becoming more complicated as a result of social policy reform. One of the distinguishing features of a *Local* voluntary organisation is the impact of volunteers (Knight, 1993). The volunteer team at *Acadia* is split between two levels of adviser, initial assessors and advisers. The role of the initial assessor

is to gather information and find out the reasons for the service user's visit. They can then begin providing advice on their situation or gathering information so that they can undertake research into the issue alongside peers and supervisors. An adviser is often tasked with dealing with the complex issues that are brought into the organisation, delving into the specific problems that the service user has. Some volunteers have specific skill sets, which allow them to work solely on one aspect of advice, aiding this level of complexity. *James* held a degree in mathematics and had a great deal of knowledge on financial capability. Therefore, his skill set provided him with the ability to advise in an independent manner as a financial capability adviser, offering a unique service for service users. His role was to

‘Show them [service users] how to use websites like useless.com and Martin Lewis’s Cheap Energy Club and so forth...I’ll show them a list of the cheapest energy companies and ask them which one they want to go for’ (*James, volunteer*).

This particular role allows *James* to not only work independently on his project but also be involved in many other aspects of the organisation as his advice can be connected to many of the issues that service users bring into the organisation. Therefore, voluntary advice at *Acadia* is more than just solving an issue for an individual, volunteers are on hand to further the knowledge and skill set of their service users, helping to ensure that all possible routes are being followed to avoid the individual being in a similar situation in the future. This corresponds to Kirwan's (2017a) definition of voluntary advice, that it is more than telling an individual what to do in their definition, it is 'work oriented towards enabling clients to make informed decisions' (2017a: 5). This thesis, therefore, extends Kirwan's (2017) view as it demonstrates that *Acadia* is working towards community development through advisory services. This argument is lacking in academic discussion, with more focus being on the relationship of *Federal* organisations and the community to solve particular issues, such as employment or race (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013).

The supervisory role, carried out by *Dawn* and *Jack*, is important for the provision of advice at *Acadia*. Emphasis was placed on this role by a number of volunteers, who find that it is a support system for them to ensure that they are providing the correct advice to the service users. This viewpoint is shared by the advice session supervisor,

‘The role of the advice session supervisor is to underpin and be a safety net for the advisers to make sure that the advice given is the correct level for the quality of audit purposes’ (*Jack, Volunteer*).

This notion of auditing can be further related to the funding driver of change that has been identified, along with political forces and the evolving architecture of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015). Harris (2017) identified that funders of voluntary advice organisations are increasing pressure for organisations to modernise their services whilst providing greater value for money (Kirwan, 2017a).

This thesis suggests that as opposed to value for money, service users are seeking value for time. It was stressed by multiple volunteers that the best course of action when advising at *Acadia* is to give the service user all of their options, although this may not necessarily be what they expected from the advice session,

‘You try and discuss with them what their options are and usually, it comes down to, they want *you* to do it, but you have to discuss with them what their options are because you may not be the best person, always, to do it, there might be somebody better placed’ (*Carl, Volunteer*).

This notion of value for time can be associated with *Acadia*’s transition to a *Local* organisation and their concentration on community development through building the skills of service users. The transition that *Acadia* took to become a *Local* organisation has allowed them to now solely concentrate on the values of their organisation. By detaching their affiliation to the *Federal* body, *Acadia* now has more adaptability to meet the needs of the service user and provide a greater value for time as opposed to delivering the advice set by the funder. Additionally, whilst *Carl*, a

volunteer, stated that service users often ask a lot of volunteers, by enhancing the skills of the individual the organisation is providing a great value through the advice that they offer.

Advice at *Acadia* can be provided via telephone or email, since transitioning into their new formation, the organisation had received around 70 emails seeking advice, something that they had not offered when associated with the *Federal* body. Research by Harris (2017) supports this argument as she suggests 'policy reform and funding allocations are currently directing advice provision away from face-to-face assistance and towards telephone and digital services' (2017: 53). Whilst there is an increased pressure to provide advice and for service users to access advice through digital services, there are issues related to this. Balmer et al. (2012) and Harris (2017) both found issues surrounding telephone and online advice and it was evident that when providing these types of advice it was more difficult to extract all of the information needed for a given issue. Findings at *Acadia* are consistent with these arguments, *Ken* stressed the difficulties surrounding email advice, stating that the organisation can become overwhelmed by this provision. It was also noted that it was difficult to provide individual advice via email as there are often pieces of information missing, and no access to paperwork regarding the issue. Therefore, the organisation usually tends to contact the individual and carry out a telephone interview following the initial email if the service user is comfortable with gaining advice in this manner.

Challenges for advice in a voluntary organisation within this research have been found to be multifaceted. *Acadia* uses their advice process to aid community development; however, this creates a more difficult advice-giving role for employees and volunteers, particularly given the rise of online applications for benefits such as Universal Credit and therefore the rise in digitally-based advice (Harris, 2017). They are pressured to also create value for time for service users due to the severity of issues and demand for the services of advice organisations due to social policy change, as supported by the findings of Kirwan (2017a). This is both synonymous with the issues identified in the field but also rejects the government's assumption of an increased move to digital

service and advice. It is clear from these findings at *Acadia* that both service users and the organisation benefit more from face-to-face advice sessions.

5.3 Employees at *Acadia*

5.3.1 Project Coordinators and Employee Roles

The role of employees in voluntary organisations (Lee, 2016) and voluntary advice organisations (McDermont, 2013) has been discussed, noting that they play an important role in supporting volunteers and offering some aspects of service delivery. Whilst these points were highlighted during the research, *Acadia* revealed a more in-depth need for employees than has been noted in the literature field. This relates to the open and inclusive ethos that is pursued at the organisation to promote its future development and sustainability. At *Acadia*, employees are involved with projects across all levels of the organisation and have a relationship with many other members of staff and volunteers. It has, therefore, become a key objective for employees to have an input into the planning and development of the services offered by the organisation,

‘When we meet, they’ll say ‘we’re understaffed on this or that’s not working or we need more resources here’ and then I’ll see what I can do to sort that out’ (*Ken, Manager*).

In order to aid this development, the coordinator role becomes imperative. Manager of *Acadia*, *Ken* explained that the primary role of the coordinator is to ensure that a project is running according to the requirements set by the funder and that all of the members of the project are complying with these requirements. *Bonnie* is a housing coordinator at the city centre office, and also responsible for all of the staff at the housing office based within the court. This was a demanding role as she led the team through the projects with the Legal Aid Agency, ensuring that all targets were met and advice was provided in the most effective manner possible. *Dawn* is also a coordinator, in charge of overseeing all volunteers. It is her role to ensure that volunteers on advice sessions have the resources and support they require to conduct their role effectively, without this role, many projects and services may run inefficiently creating developmental issues

for the organisation. This role allows coordinators to offer informed insights to the organisation when involved in development if this remained at managerial level; the values of service users, volunteers and other employees may be overlooked.

5.3.2 Motivations for Employment

It is understood that individuals often utilise their past skills and experience when taking up a role in a voluntary organisation, Kamerāde & McKay (2015) articulate that voluntary sector employees are likely to be employed in skilled trades than their counterparts in the private sector. This can intrinsically be linked to the uptake of employment in a skilled advisory capacity at *Acadia*, corresponding to relevant literature in the field (see, for example: Cunningham, 2001; Nickson et al., 2008; Stride and Higgs, 2014). For instance, it was found in a Scottish study of voluntary sector managers and employees that employees in the voluntary sector have a high level of job satisfaction, current and future employees are likely to work in the sector due to an altruistic orientation' (Nickson et al., 2008: 24). This can be further associated to a phenomenon known as 'voluntary sector ethos', in which employees are motivated to meet the needs of a particular cause, community or client group (Cunningham, 2001; Nickson et al., 2008; Lee, 2016). Many of the employees interviewed at *Acadia* had previous experience surrounding the work that the organisation carries out; *Joanna* had previously worked in client facing care roles before moving into volunteering with the organisation and then into her paid role. *Dawn* and *Bonnie* had also both been volunteers with the organisation and had gathered a large amount of experience around advice and the process of advice giving within the year before taking up their current roles. *Peter*, on the other hand, had recently retired from the pharmaceutical industry and therefore articulated that his role in money advice had started as a voluntary role and was new to him since retiring, he had therefore been keen to take up many training opportunities to gain skills and qualifications for his new role.

Furthermore, the job satisfaction that is provided in the voluntary sector can entice individuals, with research suggesting that job satisfaction and life fulfilment is greater in the voluntary sector

than the public and private sectors (Kamerāde and McKay, 2015). This thesis enhances work carried out in this area, highlighting the individual motivations for taking up employment in the voluntary advice sector as opposed to similar private or public agencies. The motivation for working in a voluntary organisation was a common theme that emerged from the interviews. Participants highlighted that, similar to the literature provided by Cunningham (2001), Nickson (2008) and Lee (2016), their motivations were largely altruistic; they were interested in helping people, something that had previously been a hobby. Not only were employees motivated to work at *Acadia*, but employees also highlighted that camaraderie within the organisation was a significant motivator for the length of service each individual had given to the organisation. Similarly, to *Ken's* appreciation of the role of employees in development, employees stated that the teams all work well together and that the management is

‘Very approachable, is really hands-on with dealing with things’ (*Joanna, employee*).

These were important motivational factors for employees, particularly given the difficult issues they deal with and lack of resources for their positions as a result of austerity measures and recent social policy reforms, a movement that could have endangered the continuation of services at *Acadia*.

5.3.3 Challenges for Employees

Whilst the challenges that occur for volunteers has been discussed in the wider academic debate, particularly surrounding the changing cohort of the workforce that is further discussed here (Aiken and Harris, 2017; Costello et al., 2017; Harp et al., 2017; Dallimore et al., 2018), it is important to recognise the evolving cohort of employees that is also occurring at *Acadia* and largely disregarded in voluntary sector debate. Organ and Sigafos (2017) highlight in their research on the availability of voluntary advice and Legal Aid that many advice organisations are losing several members of their specialist employment teams as a result of social policy change. This argument is particularly prevalent for advice organisations, as service users often require specialist advice that *Acadia* stated is provided by the teams of employees at the organisation.

Multiple participants highlighted that they had felt the implications of no longer have a specialist welfare rights worker on the team particularly during the social policy reforms that are occurring. This means that their role was now including the complex advice of welfare, or service users had to attend multiple appointments to receive the advice they could have once gathered in one sitting.

A further challenge is that demand for services is increasing; employees state that this creates a complex, stressful and fast-moving role. This is largely brought about by the increasing complexity of service user's daily lives. However, cuts to funding and project budgets lead to roles that are more difficult for employees at *Acadia*. Despite this, the employee role at *Acadia* is extremely important. It allows the organisation to offer a range of specialist advice services to meet the needs of service users, however, employees' roles are becoming more restrained yet complex. This is a similar finding to the changing role of volunteers at *Acadia* and also relates to the work of Osborne (1996). It was found that 'the tasks that volunteers carry out in voluntary organisations are indistinguishable from those of the paid staff and so they have similar needs' (Osborne, 1996: 205). However, it is further discussed that staff have more limited training for their roles and so there is a need for advancement in this, this thesis suggesting that this is especially prevalent during difficult policy climates.

5.4 Volunteers at *Acadia*

5.4.1 The Importance of Volunteer Advisers

As with many voluntary organisations, although they may be structured with some members of paid staff, a large cohort of volunteers complement and extend the work that is done by employees (Musick and Wilson, 2008; Rochester et al., 2010). Voluntary advice, in particular, is provided by a cohort of volunteers as opposed to employees due to the growing lack of resources available to voluntary advice organisations and increasing demand as a result of austerity measures and social policy reform respectively (Kirwan, 2017a). The provision of advice at *Acadia* is also largely carried out by volunteers,

‘They’re the bread and butter of what we do’ (*Ken, Manager*).

The organisation uses volunteers to provide these core services but also equips them with the skills needed to gain employment, further skills or return to education. Therefore, an important element of the volunteer role at *Acadia* is the continuous training that is offered to volunteers. Many of the interviews were carried out with volunteers who had been at the organisation for a number of years and had undertaken their training when *Acadia* had been affiliated to the national body. Whilst training is important to many volunteer roles, it does add a more serious implications to voluntary action, potentially taking away from traditional, altruistic motivations to more bureaucratic or corporate tendencies (Rochester et al., 2010). One interviewee had joined the organisation following the transition to a *Local* organisation when discussing the training element of the role she shared that

‘I think it gives you some confidence that you know a little bit about the subject areas, plus, your cohort of volunteers that start with you, you can get to know them as a group’ (*Rebecca, Volunteer*).

Whilst training is necessary in order to undertake a volunteering role at *Acadia*, training sessions are also provided on a monthly basis, this allows volunteers to interact with managers and experts in the fields that they are advising. Furthermore, it gives volunteers the opportunity to gain more advanced skills and knowledge on particular areas of demand, such as mental health and support service users in their needs.

5.4.2 Motivations for Volunteering

There are a number of motivations for voluntary action, according to theories put forward by Rochester et al., (2010) sociologists associate volunteering with a social relationship to the organisation. Volunteers at *Acadia* derive from varied backgrounds and spoke at length about their passion, commitment and motivation for volunteering (Table 5). Musick and Wilson (2008) identify that a range of different personality traits can be found in the individuals that take part in

volunteering. For instance, extroversion, gaining pleasure from interacting and helping others and self-efficacy in which individuals feel that their roles as volunteers will help to benefit and reform the community, two traits that are specifically demonstrated at *Acadia*.

It is important to highlight that motivations for volunteering are complex, although it is suggested that organisational structure can play a part (Rochester et al., 2010). This is because organisations of *Acadia*'s structure are often community-based and therefore, individuals are motivated by local community development. *Acadia* is based in an anonymous office location in Liverpool City Centre, in which community-based motivations are not as prevalent. This theme is further demonstrated by Musick and Wilson (2008) in a comparison of rural volunteering, which is understood to be where the majority of volunteering takes place. Voluntary action by city dwellers does exist, the authors found that volunteering rates were less than their rural counterparts, but still, a considerable number especially carried out by individuals who travel into the city to take part in volunteering (Musick and Wilson, 2008).

Volunteer	Background & Motivation
<i>Rebecca</i>	Experience working in a managerial role for a local authority, also as a teacher and a social worker provides insight into benefits and dealing with members of the public.
<i>Matthew</i>	<i>Matthew</i> has spent many years as a carer for his wife, this gave him knowledge of caring allowances and the process of claiming for disability benefits.
<i>Sam</i>	Volunteered with a charity shop for many years, using the experiences of dealing with customers in a voluntary role to his advantage in the advice-giving position he is now in.
<i>Hazel</i>	<i>Hazel</i> had shared some similar experiences to service users as she had used the benefits system and had been a service user of <i>Acadia</i> .
<i>Piers</i>	<i>Piers</i> had used the benefits system as he was previously on Job Seekers Allowance when he started volunteering. This gave him similar experiences to some service users.
<i>Camilla</i>	Left employment early due to medical reasons, providing insight into some of the issues service users were facing and greatly impacted on her role at <i>Acadia</i> ,
<i>Jack</i>	<i>Jack</i> 's background is in nursing, the move into voluntary advice was due to his extensive experience surrounding care issues and care benefits from a practitioner's viewpoint.
<i>James</i>	Background and degree are in information technology, his advanced skills are used to help service users and other members of <i>Acadia</i> with advice that is internet based.
<i>Carl</i>	<i>Carl</i> has a postgraduate degree in Law from a local university and experience of working for a housing association through the local authority.
<i>Emily</i>	Has extensive volunteering experience in a hospital setting. This allows her to bring service user-facing skills to her role at <i>Acadia</i> .

Table 5: Background and motivations of volunteers at *Acadia*

Whilst these previous roles and experiences all influenced the volunteers' current role within *Acadia*, their motivations for volunteering differed slightly. One of the most profound motivations for volunteering at the organisation was to take part in a meaningful activity,

‘There isn’t free advice anymore and it just appealed to me because [of] the things that you can help’ (*Camilla, Volunteer*).

Sharing similar experiences to individuals in a voluntary organisation was important to many participants, whether those experiences are shared with service users or other volunteers,

‘I actually started it because I came here originally due to me needing support myself...at that time, I was sitting at home playing on the computer somewhat and I was getting bored of playing on the computer. I saw what they do here and I thought, “I’m going to put something back into this”’ (*James, Volunteer*).

‘The people you’re working with are all the same. They’re all in the same boat and you can share your own problems and issues. Of course, it makes you forget your issue, you know, you forget your troubles at home’ (*Matthew, Volunteer*).

5.4.3 Relationships at *Acadia*

Positive relationships and cohesion between volunteers enhance the voluntary experience for all involved and promotes further voluntary action in the community (Ellis Paine, 2015; Nencini et al., 2016). The morale of the team and the ability to move through the organisation into other roles is another area which not only motivated volunteers to begin working with the organisation but also reflects the positive relations that volunteers create in the organisation. Participants stated that the whole team are closely connected, the openness of the organisation had allowed them to move into different positions within the organisation, should any issues arise with any teams it is easy to move in another direction without friction

I: There's a community?

R: I'd go further than that, yes. We're all mates, aren't we?' (*Piers, Volunteer*).

Further to this, volunteers stressed that they now feel more comfortable operating as a *Local* organisation. They witness service users reaping the benefits of independence also, many volunteers articulating that demand had increased since the transition, the organisation now holds a friendly atmosphere for service users and a positive morale for volunteers at *Acadia*,

'We're friendly, the staff are very accommodating, they'll go out of their way, overstep what they need to do' (*Hazel, Volunteer*).

'There's a band of people, with different issues and problems that come together to try and help other people which is quite unique' (*Matthew, Volunteer*).

Interviews with the manager of *Acadia* revealed that these relationships between volunteers and service users can sometimes be hard to find, particularly given the anonymous location and lack of community in the city centre. Similar findings have been identified in the wider field, as it has been suggested that close relationships are often built in small, community-based organisations or ones with a specific focus (Ellis Paine, 2015).

Contrarily, volunteers suggested that they have many repeat service users, who often request a particular adviser as they have built a rapport and told their story to one person. It was elucidated that the organisation saw many service users who felt they were attached to the organisation. *Dawn* shared that her position allowed her to see that there were many returning service users, and she believed this to be due to the inclusive nature of *Acadia*, that great emphasis was placed on nobody being left out of the service. Therefore, the individuals of the local and wider area could have confidence in the organisation, drawing on the supportive and free service that was offered by the employees and volunteers,

'We try to do as much as we can, physically. I mean I can't do phone calls and stuff like that or I'll tend to say to them, "Here you are, I'll put you in a room, I'll put you on the

phone, if you have any difficulty during the conversation then, by all means, come out and come and get me. I'll come back in and I'll speak to the person on the phone." (*Hazel, Volunteer*)

'We're having to turn people away sometimes. It depends on the situation as well, you know...Our advisers only get three appointments on the day, so if you've only got two advisers that's six appointments. I don't need to do the maths; if you get 30 people in and there are only six people on the day, they're not going to get seen' (*Piers, Volunteer*).

5.4.4 Challenges for Volunteers

The economic climate is one of the largest obstacles that *Acadia* faces when recruiting volunteers. Current volunteers stated that potential recruits often need to find paid work rather than taking up unpaid work in the voluntary sector, concurrent with some data that reveals trends in volunteering uptake follow social change peaks and troughs (Dallimore et al., 2018). Further to this, the nature of voluntary advice work is complex and demanding, it is viewed as not an easy type of voluntary action (Kirwan, 2017a). The recruitment and subsequent retention of volunteers was a concern of *Ken's*, finding the recruitment of volunteers a difficult aspect of his role. Therefore, the organisation has to ensure that volunteers are given high quality and regular supervision in order to keep on top of any issues or struggles that they may be facing as personnel resources are limited. Additionally, making sure each individual is up to date with changes to social policy and other issues that affect the organisation such as the introduction of Universal Credit.

The transition from *Federal* to *Local* organisation brought about many organisational changes for *Acadia*, one of which was branding and a new organisation name. Rebranding allows organisations to differentiate themselves in their social and political context, but this can have implications for practices, policy and personnel (Macmillan et al., 2013). As a *Local* organisation, *Acadia* faces different, and potentially challenging opportunities for recruiting volunteers as suggested by Ellis Paine (2015). For instance, the manager of the organisation was concerned that potential volunteers may be unaware of the new brand and ethos of the organisation, a troubling

concern in an already precarious economy for volunteer recruitment. This is due to the need for individuals to seek work over voluntary opportunities and for advice opportunities especially, complex caseloads can be off-putting for potential volunteers (Kirwan, 2017a; Organ and Sigafos, 2017). There are instances where individuals enter the organisation and want the volunteer adviser to 'fix' their problems for them. This is alongside the pressure of full waiting rooms and the urgency to see as many service users as possible. This corresponds to literature that suggests volunteers are taking on a growing number of professional or corporate roles that would have previously been carried out by paid workers, increasing the pressures placed on volunteers in recent years (Ellis Paine and Hill, 2016),

‘Sometimes you’ll come in and do paperwork when the office is not open to the public and that’s when you do your write-ups and get your things on the computer because on a drop-in day, it’s just too busy to be able to write things up’ (*Matthew*).

There are significant challenges for volunteers at *Acadia*, for instance, they are dealing with complex and demanding issues from a diverse range of service users. This is particularly difficult for volunteers as they are at the 'front-line' of advice giving, therefore they have to be aware of social policy changes that affect service users as they are often the first port of call for advice. The economic uncertainty that has been brought about by social policy reforms and austerity measures has led to a reduction in recruitment at *Acadia*. The role of current volunteers is therefore pressurised in order to deal with the increasing demand that was also a result of social policy reform. Many of these roles were explained to have been previously taken up by employees and so the volunteer’s role is becoming even more complicated and demanding.

5.5 *Acadia* and the Lack of Local Community

5.5.1 Importance of *Acadia*’s Service in Liverpool City Centre

The ability to build relationships with the available community in the city centre is incredibly important to *Acadia*. This is also the case more broadly in the sector as it has been demonstrated

that it is important for voluntary organisations to build and maintain relationships with other organisations and local authorities to build capacity and sustainability (Jones et al., 2016). This is of particular importance following the transition to *Local* organisation due to the growing positive reputation that the manager, employees and volunteers have built. These networks have not only been built with service users but have been strengthened and realigned with other organisations, the public sector and policymakers. *Ken* highlighted that service users are aware of the connections and relationships that the organisation has and they have confidence in accessing the services, knowing that they will usually leave with some advice or information on the best places to access the services they need.

Being able to access a free advice service is imperative for the Liverpool City Region, especially as many individuals have experienced sanctions around Job Seekers Allowance or Employment Support Allowance, an experience that is shared throughout society during the era of austerity that is currently occurring (Field and Forsey, 2016; Organ and Sigafos, 2017). Employees noted that service users are all treated identically and without judgement, something they feared may not happen if the service users had to use a chargeable service such as those offered by solicitors, which led into their commitment to the voluntary sector. Employees shared information regarding the service users that they had contact with on their respective projects, they told of the importance of offering a free service to service users. The service users often shared with interviewees that they felt they were in 'impossible' situations and that they did not have a way out of the issues they were dealing with. Employees also told that many of their service users they had contact with felt embarrassed of their situation and the need to gain advice from a voluntary organisation

'They're struggling basically or they've had to give up work and they're drawing their pension and they can't maintain the payments and you'll find that these people are very very proud people and feel totally embarrassed coming in so we try not to judge anyone and just get the best outcome for them' (*Joanna, Employee*).

This leads to one of the difficulties of providing advice in a paid role at *Acadia*, many volunteers stressed that service users are not keen to share their whole story with the adviser. The employees have to work hard to gain the trust of the individual, as often they reveal little about their situation in an interview,

‘People aren’t always able to articulate why there are problems’ (*Bonnie, Employee*).

Therefore, advisers must use their training and experience of dealing with these sensitive issues to use on a daily basis to build up the rapport and trust with the service user, with service users beginning to relax and becoming more confident in the steps being taken to resolve their issues. This feeds into the concept of benefits stigma, with many individuals being ashamed or embarrassed by their situation regarding benefit receipt (Patrick, 2017a). It is therefore imperative to gather an understanding of how individuals overcome this stigma, particularly regarding the ease and comfort that many feel at voluntary advice organisations, a concept this thesis begins to address.

5.5.2 Volunteer Relationship with Service Users

Volunteers were the closest of all interviewees to understanding the issues of the service users, understanding their specific needs and the importance of the service from a more personal perspective than employees do as they are on the ‘front-line’ of advice-giving. Volunteers were able to highlight the particular distress that they felt the services users of *Acadia* were under when gaining advice. It was suggested that the local community was being adversely affected by social issues in the current policy climate,

‘So, they’re [current government] forcing people, through cutting the welfare, to do things that some people just can’t possibly do and that’s creating an underclass and it’s victimising certain groups of people. They’ve gone about it in such a draconian way and we see people in here who are really, really poor and at their wit’s end, they just don’t know where to turn’ (*Matthew, Volunteer*).

Research suggests that Liverpool has been significantly affected by austerity measures and social policy reforms and in turn, this has created a culture of vulnerable households being dependent on voluntary services (Jones et al., 2016). It was found that the Liverpool City Region had a 20 per cent reduction in public spending power at the height of austerity (2011 to 2012 and 2012 to 2013), through which the local voluntary sector has a 30 percent decrease in council funding. Building on this, a theme that emerged from these discussions with participants regarded the confidence of the service users. The volunteer role was becoming more complex as individuals have less confidence in being able to help themselves, particularly surrounding technology and contacting government agencies. It was highlighted during interviews suggesting that service users are feeling less able to make telephone calls to government agencies within recent years. This is furthered by the increase in computer-based advice and support from the government, which is particularly challenging for the older population, who may not have the knowledge to access computer-based support (Harris, 2017). Based on research with homeless voluntary organisations, Harris (2017) found that the government are putting pressure on individuals to gain access to welfare services online, particularly Universal Credit as it is designed with an online account. Additionally, there is pressure for voluntary advice organisations to move their services to become more digitally based, both through telephone (Balmer et al., 2012) and online channels (Harris, 2017). Despite these pressures and related to the findings from *Acadia*, it is argued that more complex needs are dealt with through face-to-face advice (Buck et al., 2010; Harris, 2017).

5.5.3 The Anonymous Location of *Acadia*

Findings at *Acadia*, across all themes, highlight the importance of the community to the organisation, this was one of the drivers of maintaining the services of *Acadia* as a *Local* organisation. As the organisation is located at two premises in the city centre, one within an office building and one at the Family and Civil Court, *Ken* noted that the city centre location omits the possibility of a local community that the organisation would have if they were located in a more residential area. Despite these concerns, the community remained a central theme of the

organisation. Many interviewees discussed the importance of the anonymous location of *Acadia*. Again, this was a driver of maintaining services as a *Local* organisation, *Acadia* offering the ability for a service user to gain access to advice with a high level of anonymity. This is because the main city centre office is located in a multi-use office building and therefore, service users can enter the building with the security that it is not obvious they are attending an advisory organisation,

‘When you come into this building, nobody knows where you are going. You haven’t got to queue up outside a bureau or advice centre, if you walk down a street people don’t know where you’re going’ (*Ken, Manager*).

The concept of benefits stigma can be applied again here as it alludes to the importance of an impartial and confidential service to help individuals overcome issues (Baumberg, 2016; Patrick, 2017a). Similarly, to the manager, interviews with volunteers at *Acadia* revealed the importance of the city centre location in the office building in enhancing this confidential service. It was mentioned on several occasions that volunteers feel the anonymity of the building was beneficial for the service users and the issues that they dealt with,

‘They can come in and they know their neighbours aren’t going to see them like they would if they were going somewhere in their neighbourhood’ (*Camilla, Volunteer*).

‘I think this is a very good location, because we have a lot of people coming here who won’t go to their local [*Federal* organisation] in case they meet people in there that they know’ (*Emily, Volunteer*).

The lack of community also has positive aspects for the recruitment of volunteers. The organisation does not draw on a local community in this recruitment process and therefore volunteers do not have immediate concerns around encountering somebody that they know from their community when providing advice at the organisation. This is in contradiction to academic literature that suggests that despite a lessening of community values based on location, volunteers

are more likely to take part in regular volunteering if the organisation was more conveniently located in their local area (Rochester et al., 2010).

5.5.4 Demographic of Service Users at *Acadia*

There is a great deal of need in the local area of *Acadia*, people often do not have the support of their families, are on benefits or in a vulnerable situation and therefore rely on the services of the organisation. It is well known that social policy reform and austerity measures are disproportionately weighted, affecting the most deprived individuals and areas in society the worst (Beatty and Fothergill, 2014; Jones et al., 2016; Reeve, 2017). Beatty and Fothergill (2014) suggest that ‘old industrial towns’, such as Liverpool have an excessive level of deprivation and have been some of the hardest hit by social policy reforms. A further study by Beatty and Fothergill (2016), highlights the predictions of the uneven weighting of social policy reforms, especially welfare reform, by 2020 to 2021. Liverpool remains in the top 50 national districts that have been worst affected, with an expected loss of £420 per working-age adult per annum. As a local authority, however, Liverpool is second, led only by its neighbour Knowsley. This suggests a continued struggle for residents and recipients of local authority funding such as voluntary organisations.

It was highlighted during interviews that there is a lack of advice agencies in the city centre to help the local population, a finding that is concurrent to the work of Organ and Sigafos (2017) who state that the availability of voluntary advice is dwindling. For those who are in employment and are facing problems, particularly surrounding low incomes and zero-hour contracts, they are often unable to access the advice agencies in their local area, *Acadia*’s role is, therefore, to provide advice and support for those who are struggling with the governmental reforms or require extra support

‘You’d be amazed at the number of people we do get from outside who, either, work here, or don’t like where the other offices are, or who’ve had a bad experience there and come to us’ (*Carl, Volunteer*).

‘Tell us they have lost faith in both the local and national government’ (*Ken, Manager*).

Employees provided insight into the issues that the service users were dealing with, although this was determined by the project in which they were involved. *Bonnie* stated that individuals are struggling with financial and housing issues without any major underlying concerns to explain them. Furthermore, *Peter* felt that the service users he dealt with on the money advice project were victims of the current economic situation and gripping austerity measures, as demonstrated by Beatty and Fothergill (2014).

Volunteers at *Acadia* identified the demographics of service users to be varying, it was suggested on multiple occasions that there was not a specific demographic of service user and that *Acadia* prides itself on being open and inclusive to all members of the public,

‘I think we just see a cross-section of the whole of Liverpool really and you can stand by our door and see all sorts of people come through. We don’t mind who walks through the door when it’s open, we just try and help everyone’ (*Matthew, Volunteer*).

‘I think, here in town, it’s [demographic] probably wider than maybe some that are more in the suburb areas, so it’s a big cross-section’ (*Rebecca, Volunteer*).

This large cross-section and new demographic can be related to the growing levels of deprivation in the local area, highlighting and expanding the current knowledge of this area. Liverpool has a high demand for free, legal advice services, especially for social welfare issues. This is because the Liverpool City Region has been disproportionately affected by social policy reforms, voluntary sector changes, all of which are coupled with significantly high levels of deprivation (Jones and Meegan, 2015; Jones et al., 2016; Organ and Sigafos, 2017).

5.6 The Drivers of Change

5.6.1 The Transition from *Federal* to *Local* Organisation

There is little literature that examines the transition from a *Federal* organisation to one that is *Local* in the voluntary sector, although some consider the rebranding of an organisation a symbolic step in their organisational identity (Macmillan et al., 2013). One of the largest changes for *Acadia* in recent years has been overseeing the transition of the organisation from *Federal* to a *Local Providing* organisation. A major issue that led to this transition was the lack of free reserves, or availability of cash, that the organisation held, which is not an unusual phenomenon for the voluntary sector as a whole given the tightening of resources and reductions in voluntary sector funding (Alcock, 2010a; Macmillan, 2011; Milbourne and Cushman, 2015; Jones et al., 2016). They relocated premises to an office that was more welcoming for service users and added the elements of anonymity that are so important to the service they offer. This created a lack of free reserves, as this was occurring during the time of elongated austerity measures and precarious funding climate. As a result, the national body withdrew their membership; the previous use of the branding, infrastructure, information system and policies were no longer available. It was, therefore, the role of the manager to support this decision, and rebrand as *Acadia*, a *Local* organisation

‘I contacted all of the funders, explained what had happened and 90% of them said ‘OK, we don’t really care who you are, so long as you’re still doing what we pay you to do’’
(*Ken, Manager*).

This research demonstrates that funders and service users are more interested in the service that is provided by the organisation rather than the brand name. Major changes were to be made through the organisation; including personnel changes. Staff who had been employed directly by the national body were removed from the organisation, creating friction between the individuals and the national body as they have offered in excess of 20 years of service to this particular

organisation. Two trustees also left the organisation, as they did not feel that transitioning into a *Local* organisation would be a beneficial move. Furthermore, *Ken* dealt with outside issues, as the relationships that he had worked had to build in the local area were called into question. He stated that one of his biggest fears during this transitional period was that there was some pressure being applied from the national body for other organisations not to work with the new *Acadia* in its *Local* form. Whilst this is not recognised in extant literature, it is argued that organisations can engage in strategic positioning which allows them to differentiate themselves, and their services from others in a similar field (Osborne and Chew, 2009; Macmillan et al., 2013).

The biggest change that had been felt by employees and the organisation as a whole was the process by which the transition came about. Employees felt negative about the national body and the process by which *Acadia* changed its affiliation. Employees, in particular, were frustrated with the actions of the national body and the way in which they attempted to remove the advice services from the local community. Despite these initial concerns, *Joanna* and *Dawn* shared that *Acadia* has now become a more hospitable working environment as they are not under the stringent rules and regulations of the national body. The organisation now has more freedom to operate in its own structure, creating a more comfortable atmosphere for employees and volunteers to provide advice and make changes to operations that will suit the organisation at any given time. This creates a non-corporate working environment that has multiple advantages for an organisation, particularly when recruiting and retaining members of the workforce as the organisation is more likely to meet the expectations of those individuals it has recruited (Rochester et al., 2010)

‘Everyone had confidence in what we were doing and moving forwards to and a year on... we’ll have our first anniversary but we’ve maintained that steady ethos of being able to give practical, impartial advice’ (*Matthew, Volunteer*).

The structure of advice giving at *Acadia* had not much changed during their transition into a *Local* organisation. Adviser interviews were previously split into three slots per day, but this now had

the possibility of being more flexible, as *Acadia* no longer had to abide by the rules of a national body. *Peter* told that the organisation is still facing some challenges. This is especially prevalent when advising on issues without or with only a limited number of employees such as benefits advice. This impacts not only on the volunteers who deal with the majority of benefits related advice but also on the employees on specific projects who can no longer rely on the support they once received from volunteers due to growing demand. This intensive demand and lack of volunteer resource means that although the organisation has more freedom to provide advice, some volunteers are also highlighting the issues of complex workloads, which occur as a result of social policy reform

‘It has made it [volunteering] a lot more stressful. It’s more like a real job but its unpaid’
(*Camilla, Volunteer*).

The importance of sustaining the work of the organisation was, therefore, an important aspect of the interviews with employees. Employees told that other organisations in the area could not deliver the unique services that *Acadia* prides itself on, such as the involvement of solicitors and presence at the court. This allows *Acadia* to distinguish itself as a *Local* organisation, a finding that opposes the argument of Aiken and Harris (2017) who use Rhodes’ (1994) theory of ‘hollowing out’ the state to make a case for the voluntary sector. They argue that small and medium-sized organisations are being ‘hollowed out’ through the mainstreaming of services. However, *Acadia* promotes its distinguished services, which has in turn, created a need for *Acadia* to maintain funding, with emphasis placed on taking up funding opportunities when they become available. Whilst this was an assumed aspect of the manager’s role, it was a constant consideration for employees, who were anxious about the continuation of their position in the organisation, as they had experienced the impact of the loss of a welfare specialist within recent years.

Volunteer retention is a noticeable issue for current volunteers, as the city centre location used to help with the recruitment of students, however without the national affiliation, there is no qualification for volunteering to benefit their studies offered at *Acadia*. Furthermore, operating

the organisation with solely volunteers can be problematic for the organisation as a whole as you cannot demand working hours, which has a direct effect on the opening times for the public. Additionally, the quick turnover of volunteers can be a challenge for *Acadia* and for working as a team, a clear commitment to the values of the organisation is required for volunteer retention (Rochester et al., 2010; McBey et al., 2017). When the organisation was affiliated with the national body, volunteers and employees were not able to communicate freely, with little social or community feeling amongst the organisation. The transition and the growth of freedom has allowed employees to communicate and work together more closely, demonstrating a clear commitment to *Acadia's* values

‘I think it’s hard for the morale of the team to have too many changing faces’ (*Rebecca, Volunteer*).

‘When I came here there was, the volunteers work down one side and the employer staff are down the other. I only went down there because my supervisor, who has now left, was down that side so I met a few of the employer staff but a lot of them were very secluded. Now that the volunteer area has moved down there, the bridge between the volunteers and the employers has... they socialise a lot more now’ (*James, Volunteer*).

5.6.2 Funding Provisions at *Acadia*

Acadia's experience of political forces and funding are explored below and further in section 5.6.3. Whilst the evolving architecture of the voluntary sector is highly important for the organisation, particularly given their recent transition and therefore shifting role in society, it is discussed through the comparison of all three case study sites in section 7.3.2 to provide further understanding of the differences in the roles of each organisation as they vary in structure.

Funding for the voluntary sector is complex and it is no longer unusual for a local authority or central government to be one of the smallest funders for an organisation. Many organisations gather funding from a number of streams, although those who do receive local authority funding

are often heavily reliant on that for maintaining sustainability (Jones and Meegan, 2015). As with many voluntary organisations, the funding for *Acadia* is complex, to ensure that there is enough funding in place to support the specialist advice services offered and cover the generalist advice services. As with many aspects of funding, local authority funded housing issues, as well as other projects, are coupled with stringent requirements. This puts pressure on the entirety of delivery for these services, as it is compulsory for the organisation to record cases in a specific manner.

Furthermore, such protocols apply to the advice given, as this must be delivered in a way that is approved by the local authority. With the limited amount of issues that can be covered under the umbrella of Legal Aid following recent changes, these requirements are becoming increasingly inflexible (Organ and Sigafos, 2017). Legal Aid cutbacks have been in practice since the New Labour government, in a move away from demand-led Legal Aid to one based on local legal needs. In 2012, LASPO (Legal Aid, Sentencing and Punishment of Offenders Act (2012)) was introduced and the scale of cuts increased whilst ‘access to justice’ diminished (Kirwan et al., 2017: 6). For Organ and Sigafos (2017) this, coupled with the rising demand for Legal Aid services as a result of social policy reform creates a devastating aftershock for voluntary advice organisations. This was seconded by *Bonnie* who also highlighted the effect Legal Aid cuts were having on the service, as they could now offer fewer areas of advice that fell under the Legal Aid umbrella. Not only were these changes impacting funding for this project, but the austerity measures that had led to restrictions on legal aid were also impacting organisations and service users alike. This was due to service users having to rely on the support of general advice as opposed to being able to access Legal Aid funded support.

5.6.2.1 Complex Funding Patterns

The importance of funding is paramount and therefore the successful achievement of employees or particular units in meeting targets is a large aspect of the managerial role at *Acadia*. The manager aims to manage these targets in a supportive way for the employees and volunteers without being oppressive, the ethos of the newly renovated organisation. Evidence from

interviews at *Acadia* suggests openness improves morale, with employees and volunteers stating that this improved morale has also positively impacted on working conditions, a movement that the manager felt could improve target-meeting in the long run. Concentration on economic and funding issues for sustainability can be detrimental for an organisation, especially if they are not adequately equipped to carry out the work for which they are funded. Findings at *Acadia*, therefore, support literature regarding strong organisational management, that concentrating on maintaining the mission and assessing assets can aid sustainability (Chapman, 2017). Harlock (2013) recognises the importance of impact measurement for a voluntary organisation but also discusses that this must be a socially constructed process in order to reflect the values of the organisation in the measurement. For *Acadia*, they largely reviewed their impact through the meeting of targets, although it has been further demonstrated that for organisations that deliver public services, targets can often reflect the agenda of the funder (Carmel and Harlock, 2008; Harlock, 2013). This relates back to Chapman's (2017) argument that organisations that concentrate too heavily on these patterns can be susceptible to mission drift, a phenomenon *Acadia* works hard to avoid as a *Local* organisation.

Managers are held accountable for the achievement of targets by their seniors, often the funding bodies of an organisation. They must, therefore, ensure that employees are accountable for meeting these targets through service delivery (Lowe, 2017). *Acadia* revealed that these targets are often coupled with clawback provisions, therefore the organisation must hit the targets imposed by the funder or justify the reasons why these targets may have been missed, failure to do so can result in the funder removing the funding for a project. This creates an immense pressure for the manager and the individuals who are working on these projects. As well as targets, the organisation also has to provide quantitative data detailing the number of clients seen and the number of issues that have been dealt with for example. There are also a number of qualitative aspects to this feedback that has to be taken from the advice-giving process, including profiling data of service users. In order to fulfil the wishes of the funder, the organisation has to provide a significant amount of detail in order to justify the large amount of money that is being received,

‘They want case studies, they want flesh on the bones, they want client interviews, so yeah reporting requirements are stringent but it’s accepted as being part and parcel of the job’ (*Ken, manager*).

Whilst funding is complex for many voluntary organisations, as demonstrated by the literature (Chapman, 2017), this is a particular concern for *Acadia*. Funding struggles during their transition from *Federal* to *Local* have increased pressures on the organisation. *Acadia* lost the funding that they received from the local authority for two annual funding cycles. This brought about a significant lack of funds for the general advice that they provide on benefits and sanctions for instance. This is coupled with an already stretched amount of employee and volunteer resources due to austerity measures and social policy reforms. Employees experience more of these restrictions as their projects are funded directly, and employment sustainability is a major concern. However, funding patterns can also create unease for volunteers, which is putting pressure on the advice-giving service.

5.6.3 *Acadia’s* Experience of Social Policy Change Post-2012

There are also external changes that influence the organisation, this is largely around social policy reforms and austerity measures, and the issues these can have the service users. For instance, within recent months many issues have been regarding the change from DLA to PIP, a growth in demand that was not foreseen by the organisation (Gray, 2017).

Changes that occurred externally to the organisation also affected the employees and their experience of working at *Acadia*. Employees found that the corporate actions that were being taken by other organisations, both those that were *Federal* and other *Local* organisations were affecting the services that *Acadia* could provide and the levels of demand that the organisation had to deal with. The devolution of advice organisations or the streamlining of issues is placing more pressure on employees and the services that were now being demanded by the local community. This concern was also shared by other employees who articulated that there was a

need for the general services that are carried out by *Acadia*, as opposed to specialist organisations that deal with issues surrounding health or gender for instance.

A popular conception was that benefits, debt and housing were the biggest issues but the focus of the organisation was on providing general advice for any issue that the individual was facing. *Matthew*, a volunteer, particularly argued that the organisation must remain dedicated to its general advice rather than targeting specific areas in order to help the most vulnerable in society. This can be associated with the social policy reforms and general changes to society that have taken place in recent years such as Universal Credit and PIP (Field and Forsey, 2016). The effects of these changes on the issues that are being dealt with have an impact on the volunteers and the issues they deal with,

‘We’ve seen a huge rise in homelessness because there’s, obviously, homeless people on the streets and the amount of food vouchers that we give out now, we can give out three or four vouchers a day out to people. So, there’s a need out there and it’s not just people who are homeless, people come here for a food voucher because they have low income, the salary’s just not enough to live on’ (*Matthew, Volunteer*).

These concerns are often rooted in the complex issues that are dealt with by the advice organisation. The main area of advice that was mentioned by volunteers was issues surrounding welfare and benefits appeals, particularly with the recent rollout of the PIP. The complexity of these issues relates to the effect each of them has on each other,

‘You’ve still got to pay for the child but you’re not going to get any help. So, that then leads to debt. That then leads to housing issues. So, it has a knock-on effect’ (*Jack, Volunteer*).

This creates complex advice sessions, volunteers sharing that there are often multiple issues and stories to untangle before an individual can begin dealing with their issues and gaining advice, a finding shared with Kirwan (Kirwan, 2017a). This is often because service users feel embarrassed to share their issues with volunteers, therefore it is in the volunteer’s interests to maintain the ease

of advice giving that they feel *Acadia* currently gives, aiming to ensure that the process of accessing advice is as easy as possible for the individual.

Furthermore, there were concerns about the vulnerability of service users and their continued reliance on voluntary services, particularly for advice purposes,

‘If you’re going to turn round and cut people’s benefits, if you’re going to reduce the amount of money that they’ve got to live on, then you’re going to create a group of people who simply can’t live, they can’t survive, so, they’re having to reach out for food vouchers’ (*Matthew, Volunteer*).

Not only is this creating issues for service users who are becoming increasingly reliant on voluntary services, but volunteers also stated that austerity measures and consistent reforms to social policy were complicating their voluntary role. There was a consensus amongst volunteers that the need for crosschecking advice and information was increasingly important. Many volunteers arriving at the organisation early to check if any new changes had been made since their last day of volunteering, which was often the day before,

‘I always make a point, when I come in, I just to see if there’s anything changed. So, it’s fresh in my mind for the day’ (*Jack, Volunteer*).

Dawn suggested that the welfare reform that has been occurring since the introduction of the Coalition government in 2015 is also affecting the organisation and the employees. This corresponds to literature that suggests service users are being disproportionately affected and fewer organisations remain in the city that dealt with the issues that service users required (Jones and Meegan, 2015; Organ and Sigafos, 2017). This was arguably due to the growth and recommendation of telephone and email advice, which invariably locks some individuals out of self-help and working through their own issues (Harris, 2017), again driving up the demand that *Acadia* is experiencing, which can be associated to the lack of research into voluntary advice organisations. This is also associated with a further concern that was highlighted, suggesting that advice services are not being considered by authorities,

‘Government are basically not giving enough money or enough thought [to advice]’
(*Joanna, Employee*).

The transition to a *Local* organisation had the potential to bring about more negative than positive changes. However, this is not the case for *Acadia* that has worked as a unified team to continue providing much-needed advice, help and support for the local community. Some negative changes have occurred within the organisation, for instance, employee retention has decreased due to funder pressures in delivery and budgets. It is social policy reforms and the economic climate have increased demand and the complexity of issues as opposed to the restructuring of the organisation. This is because the current policy context creates a more difficult role for volunteers who must keep abreast of fast-paced changes in addition to their usual role.

5.7 Chapter Summary

This chapter has analysed the operations and provision of advice at *Acadia*, a *Local Providing* organisation, in doing so, the chapter has examined the five key themes that emerged from the data; *advice, employees, volunteers, community* and *the drivers of change*, aiding the investigation and understanding of the provision of advice and experience of social policy reforms at a voluntary advice organisation. This offers an alternative viewpoint of these experiences as the organisation has transitioned from *Federal* to *Local*, unlike much of the research available that is solely concentrated on Citizens Advice (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). This chapter, therefore, addresses multiple research questions:

- II. What is the perception of social policy reform and austerity measure of managers, employees and volunteers in voluntary advice organisations?
- III. What are the challenges and opportunities for voluntary advice organisations in the current policy context?
- IV. To what extent does the local community impact on the provision of advice by voluntary advice organisations?

Analysis within the chapter highlights the transition process that *Acadia* has undergone in restructuring the organisation and the way in which the advice process has altered as a result of this. Aiken and Harris (2017) argue that small and medium-sized organisations, such as *Acadia*, are being ‘hollowed out’ and forced into providing more mainstream services to meet the needs of public and private funders. However, through the move from a *Federal* to *Local Providing* organisation, *Acadia* has disregarded this theory and have demonstrated that it is now able to become more flexible in terms of advice-giving and move away from the mainstream services it was once providing as part of the *Federal* body.

This thesis argues that although *Acadia* are located in an anonymous building in Liverpool City Centre they have a community of service users and other organisations that allows them to deliver services to aid those most in need. Being in an anonymous office building, *Acadia* could have been at risk from a lack of community. However, they have been able to build a community through individuals seeking anonymous advice where they will not be recognised or advised by people that they know, a similar finding for volunteers who also did not wish to be providing advice to individuals from the area in which they resided. This has allowed the organisation to understand the needs of the service users, which as a result of their transition from *Federal* to *Local* organisation has allowed *Acadia* to become more autonomous and locally focussed. This aids *Acadia*’s distinctiveness from other organisations in the local area, as they are able to provide the anonymous service that is not available from other organisations, especially those that are of a *Federal* structure and have a brand name. Therefore, the continuation of services as a *Local Providing* organisation has offered continuity for service users but this chapter and thesis overall demonstrates that as *Acadia* can now manage and provide advice to suit the needs of the service user as a *Local* organisation, which the organisation found was not possible through their previous *Federal* structure.

This thesis has highlighted that the drivers of change identified by Kellock-Hay (2001) and Cameron and Green (2015) as, political forces, funding and the evolving architecture of the voluntary sector, do occur at *Acadia*. Social policy reforms in particular are increasing pressure

on the organisation as they navigate through fast-paced changes. This thesis argues that at *Acadia*, recent social policy changes are putting more pressure on volunteers due to the rising complexity of cases that they deal with, coupled with the lack of resources that are available to voluntary advice organisations. Additionally, this chapter has highlighted the increased pressure to provide digital advice. The chapter also argues that digital advice can be linked to the anonymity at *Acadia* as service users are able to access anonymous advice, even if they do not have access to digital services, despite increased demand for it. Although social policy reforms, particularly Universal Credit, PIP and the ‘Bedroom Tax’ are increasing complexity, mainly for volunteers, this thesis argues that *Acadia*’s flexibility allows them to adapt their services to meet the complex needs of the service user rather than being restricted to the needs of the national organisation and constricting funders.

6 Case Study Site Three – Redwood

This chapter provides insight into *Redwood*, a *Local Empowering* organisation as presented by Knight's (1993) model of voluntary organisations. Data presented provides an overview of the organisation, its provision of advice and general operations in the first instance. Similarly, to Chapters *Four* and *Five*, the chapter then explores the five key themes that emerged from the research; *advice, employees, volunteers, community* and *the drivers of change*. At *Redwood* advice is provided across a range of programmes that are available for many members of the local community, with the provision of advice occurring within activities in each of these programmes rather than an interview style face-to-face meeting. The exploration also moves into the community, investigating the purpose of the community for the provision of advice at *Redwood*. Exploring how relationships have been formed in order to ensure the needs of the local community have been and continue to be met. This chapter argues that advice delivered through the methods at *Redwood* greatly meets the needs of service users and aids the organisation in developing the local community. Furthermore, *Redwood* seeks to find holes in the provision for the local community and meet them as an organisation, they are able to do some through the flexibility of being a *Local Empowering* organisation and ownership of their own buildings. This gives them the ability, as a *Local* organisation, to demonstrate great resilience in the face of significant change for the voluntary sector and the local community.

6.1 The Story of *Redwood* – A *Local Empowering* Organisation

Redwood is a *Local Empowering* voluntary organisation, using the definitions and findings provided by Knight's (1993) robust study into national and local voluntary action (further discussed in section 1.3). This thesis terms *Redwood* a *Local Empowering* organisation as *Redwood* is consistent with the definition that local voluntary action is 'inseparable from the local eco-system' (Knight, 1993 p. xiv). Further to this, the organisation is *empowering* as they are

community embedded and strive to meet the needs of the services users and the wider community as much as possible. For *Redwood*, this embeddedness relates to the strong focus on local need and development that promotes community inclusion at the organisation. It is within this mission that they work *with* members of the local community, providing advice and support on a range of issues as opposed to providing advice *for* service users.

Redwood offer advice in a different manner to other voluntary advice organisations, including *Sierra* and *Acadia* (Chapters 4 and 5). Advice is provided by volunteers and employees on a range of projects, from men's health, gardening, and veteran's services to youth employment. The format of advice-giving is largely informal, with service users gaining access to advice from the individuals who are involved in a project during activities rather than a traditional face-to-face interview

‘Just through general conversation, people will say a lot more over a cuppa tea and a biscuit rather than if they were sat here like this [interview style]’ (*Diane, Volunteer*).

Advice is offered on each of these projects that are delivered from the organisation's centre within the local community. These projects are designed to meet the needs of the local community as *Redwood* is opposed to altering their services and advice to the needs of funders. Instead, they tailor their programmes to the needs of the local community by identifying a need and current gaps in provision. Whilst this could be constraining in terms of the breadth of advice given, *Redwood* place emphasis on all programmes being open and inclusive, therefore if an individual requires more advanced advice, they are able to access individuals on other projects or from the central organisation team. As well as this project-based advice, the organisation also boasts a computer hub. Individuals from the local community, who may not have access to computers and the internet, are able to use the facilities of the organisation for job searches, gaining technological skills and general advice.

Employees and volunteers often work on project-specific roles, many of which are dependent on their past skills or the skills they are looking to build through the organisation. Despite this,

Redwood operates in such a way that an individual at the organisation is able to transition between projects, allowing them to build their skills through their voluntary role and then move into paid employment. These prospects were stated to be appealing to many individuals in the local community, which ultimately aids the recruitment and retention of volunteers and employees at *Redwood* and positively influences sustainability.

6.2 Advice at *Redwood*: The Importance of Informality

6.2.1 The Provision of Advice at *Redwood*

Advice provided by local and community organisations is significantly under-researched, much of the data that exists around advice analyses the work carried out by *Federal* voluntary organisations such as Citizens Advice (Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). *Redwood* provides a multi-partner service that holds advice at the core of many projects, although they are not all explicitly advertised as being advice-based but offer support largely around welfare, benefits, debt and money management. One of the largest projects at the organisation is a men's health project that works with vulnerable males to ensure that they are remaining active and providing them with fitness and sports activities. This has advice services imprinted on its foundation as individuals are able to approach volunteers and staff members with any concerns, particularly regarding health and they will be offered support and guidance by the organisation or signposted to one of the many contacts that *Redwood* has in its network.

As well as this inclusive project, *Redwood* stated its concern over the levels of deprivation and subsequent lack of access to computers and technology in the local area,

‘When you think we're one of the highest unemployed and the changes to the welfare to work act mean that individuals have to job search online, how can you ask someone who's

receiving benefits to pay £20 a month for broadband. So, a lot of individuals in the community get sanctions so we made a conscious decision as an organisation to develop that project' (*William, Manager*)

This is supported by Harris (2017) who states that recent social policy reforms, such as Universal Credit, are driving towards more online access for recipients that further ricochets into the digitisation of voluntary advice. To address this, *Redwood* offers a 'Hub', a bank of computers for local residents to access free of charge to provide individuals with access the internet and other information technology services.

Once again, whilst this is not a formal advisory service, the organisation aims to help individuals, particularly those who have been sanctioned through advice and support wherever necessary,

'There's also regular computer classes as well so we try to get a computer class every 6 to 8 weeks, and it's very informal, very small numbers no more than 8 so we can have 3 to 8 on a course depending... It's built to their needs and their levels, it's not based on a structured classroom because everyone earns differently and everyone comes with different levels, so we've stripped that back to where everyone is happy with and take it from there so everyone is learning together basically' (*William, Manager*).

The involvement of the community in voluntary action is exceptionally important for creating positive and sustainable organisations (Smith et al., 2016). Hemmings (2017) states that austerity and welfare reforms are diminishing this ability as a growing lack of funding and support for the sector are prohibiting the ability for organisations to communicate with and provide the voice of their local communities. Community inclusion is at the core of advisory services at *Redwood*, programmes are designed to cater to a cross-section of the local population and meet the needs of a wide range of individuals. This has led to the growth of programmes such as men's health and the youth inclusion programme for 11-17-year-olds, groups that *Redwood* have found are under-represented by other voluntary organisations in the local area.

Advice at *Redwood* is not always given in the formal instances that are common with organisations that have a *Federal* structure, it is often provided in a manner that will suit the population a particular programme is aimed at. For instance, the organisation offers a volunteer programme, which allows individuals from the local community to become volunteers with the organisation and equip them with the skills to move into employment once the programme has ended. As this was a success, the organisation also uses this same framework to employ individuals, providing them with much-needed experience for the labour market and subsequently preparing young adults to enter the workforce,

‘We will employ local young people aged 18-25 and train them up in a number of aspects of community work. So, we will be looking for a gardener and maintenance people, an admin receptionist worker, a media publicity worker, a caretaker car park attendant, minibus attendant, 2 community workers. We will bring all of these together, and these are young people who have been NEET, not in education, employment or training because they’ve got specific barriers and we’ll work with them for 6 to 12 months in removing them barriers, upskilling them and getting them into employment (*William, Manager*).

Phillimore et al. (2010) state that whilst there are some commonalities between ‘community-based’ and what are usually larger and nationally based organisations, the distinctiveness that occurs for ‘community-based’ organisations has been largely under-studied. These ‘community-based’ organisations are usually embedded in their communities and focus on the specific needs of these individuals (Phillimore et al., 2010). This embeddedness allows volunteers to be gathered from the local community and therefore the organisation can develop an identity and belonging for all involved in the organisation (Dallimore et al., 2018). Despite this, across the many programmes and projects that *Redwood* provides, the manager stated that they engage with around 4000 individuals per year, a significant amount of the community in which they are situated.

A further programme that is offered by *Redwood* is its veterans programme a formal advice and support service for veterans of the armed forces and their families⁶. The organisation provides support for individuals who are in the local community, in custody or being treated on the NHS, with the majority of advice being provided at a shop front in the local community. Research suggests that large-scale veteran's charities such as the Royal British Legion and Help for Heroes are some of the most successful in the sector, but that the involvement of voluntary organisations that do not operate on such a scale is growing rapidly (Gribble et al., 2014). It is further suggested that this rapid growth may cause concerns for the sustainability of some organisations as donations to smaller-scale organisations may be discouraged due to the increased saturation of the veteran's charity sector during the period of austerity (Gribble et al., 2014). It is therefore important to consider and understand the role of the veteran's programme and their advisory services at *Redwood* as a *Local* organisation.

The veterans programme works with individuals, of an ex-forces background, who have identified that they need help and support, working with the individual to work through their problems with a like-minded individual through a particular system to address advice issues with service users. This is through what *Redwood* term a 'buddy system' whereby a volunteer will meet with an individual and support them through their whole advice experience in order to provide a consistent support to the service user. Interviewees who work on the programme stated that many issues are easily resolved because the employees and volunteers on the programme have a significant amount of training and experience to be able to deal with the complex issues that come in as a result of the individual's background and the current policy context. Many of these can be unique to veterans and therefore may have been overlooked at another advice organisation or government agency. It is thus important to involve the individual with this resolution process in order to avoid similar issues arising in the future,

⁶ At the commencement of this fieldwork, the veteran's programme was operating as a programme within the *Redwood* structure. During the fieldwork period and during the write-up phase of the study, the veteran's programme has now become a registered charity in its own right, although it still works closely with *Redwood*, with many of the members of management working at both charities.

‘So, they come in and they will get buddied up with one of our Senior Buddy caseworkers who, basically, he will sit them down and say, “What’s the problem? How can we help?” And, “How can we achieve it?” So, we’re not saying, “We can do this. We can do that.” But, how are we, *us*, working as a team, going to achieve what you need to achieve?’
(*Adam, Employee*).

It is important to provide advice in a comfortable and relaxed environment when dealing with sensitive issues, such as those involved in the veteran’s programme

‘Sit down and have a cup of coffee, have a chat, tells me his story or her story, I listen to them’ (*Jeremy, Volunteer*).

The advice given at the organisation can differ, particularly on the veteran’s programme as the building they are located in includes a food and clothes bank. If a ‘buddy’ identifies that a service user is struggling for food or other necessary items the organisation has the means to provide these, which is particularly important when advising on issues such as housing, homelessness, benefits, drugs and alcohol. This is a particularly unique system that *Redwood* operate, as many food banks are understood to be a formal organisation. For instance, The Trussell Trust is a large, national Christian franchise, delivering over one million food parcels in 2017 and 2018, almost 200,000 of which were in the North West. Although local churches and community groups apply to the trust, many associate this action to the workings of the larger organisation (Loopstra et al., 2015; Garthwaite, 2016). Having a clothes bank within the organisation is a particularly important feature when dealing with vulnerable individuals and varying levels of deprivation,

‘If they need clothes, we’ve got suits and shirts the guys can use if they’ve got a job interview, some of them come in and say ‘can I have a shirt?’ and there you go’ (*Diane, Volunteer*).

This allows individuals to access clothes and food within one organisation as opposed to having to visit multiple organisations as it has also been suggested that access to food bank may increase the stigma that is associated to the receipt of food vouchers (Garthwaite, 2016; Purdam et al.,

2016). Therefore, this thesis shows how voluntary advice organisations are fighting against stigma and providing individuals with somewhere to deal with these stigmatised feelings.

Advice at *Redwood* is tailored to the individual, as opposed to fitting within a structured format or time limit. The organisation feels it is important to fully understand the issue at hand and deal with it in the most appropriate way for the individual involved, this is something that may not be achieved if an individual was signposted to another advice agency. This may include full benefit checks, background stories, and lengthy advice sessions,

‘I: And are these advice sessions quite long and lengthy?’

R: Anything up to about two hours... I’ll give them as long as it takes

R: I actually sit down and client work through their benefits with them, I do like a CAB job. I look at what they were coming in, your income and expenditure, I look at what benefits are on, I listen to their stories at and tell them whether they should be on PIP, ESA. Whether they should claim a war pension if they have been injured in the army’
(*Jeremy, Volunteer*).

6.2.2 Advisory Roles of Employees and Volunteers

Staff and volunteer roles differ greatly within voluntary organisations, although both are imperative to the successful operation of an organisation and the morale of volunteers (Rochester et al., 2010). This is no different at *Redwood*, however, they are operating with a small number of staff and volunteers, which is usual for smaller, community-based organisations (Aiken and Harris, 2017).

Emphasis is placed on community work and community embeddedness and this is therefore at the core of employee and volunteer roles. Paid members of staff at *Redwood* are often tasked with leading projects such as aspects of the veteran’s programme or the young person’s employment project and so advice is a core aspect of their role. This allows employees to have accountability for the work that is carried out, they are not only supporting the development of individuals on

their projects but also advancing their own development through this strategy. *Redwood* maintains healthy relationships between levels of staff, where possible maintaining staff within the organisation even if that means moving employees between projects as funding cycles come to an end. For instance, *Antony*, an employee, has previously worked on a community health project, as this funding came to an end, he had a break from employment at the organisation but recently re-joined *Redwood* to be part of the youth employment scheme. This displays a commitment to the organisation but also that community empowerment is at the core of the organisation and its workers. This has also been recognised as occurring for volunteers by Musick and Wilson (2008). However, this thesis suggests that a sense of community can also be apparent for employees in voluntary organisations.

Volunteers also take on a number of roles at the organisation, but all remain involved in some form of advice. Volunteers are regularly involved in programmes such as the men's health or veteran's programmes, whilst other aid more casually with the daily activities at *Redwood*. Musick and Wilson (2008) have also identified this, as they discussed the differences in the tasks that occur in voluntary organisations. The authors concur that volunteers do not passively enter into a voluntary role, but seek out or are offered the opportunity to partake in a particular task, much like the system of employment (Musick and Wilson, 2008). Findings at *Redwood* demonstrate this further as it was found that those who volunteer on a regular basis through a programme, in particular, the veteran's programme are also previous service users who have been through the training offered by *Redwood* and now dedicate their time to helping others. Casual volunteers offer a service that is exceptionally important to the organisation, without their support many tasks within *Redwood* would not be completed and would, therefore, jeopardise the organisation as a whole. For instance, one of the biggest roles for volunteers is to maintain the garden at the organisation, this provides a space for individuals in the local community to attend and receive informal support from the staff and volunteers on site without taking part in formal advice sessions or projects. Volunteers often have different motivations for their involvement at a voluntary organisation, this was particularly highlighted at *Redwood*. It is clear that there are

volunteers who show motivations of ‘value’, showing concern and a need to help others; ‘career’, to build skills for future employment and ‘social’, the social rewards of being involved in a programme with friends (Rochester et al., 2010).

As volunteers have different needs for the organisation, *Redwood* argued that the same can be said for service users. This research demonstrates that there is a growing need for advice services, especially for those that are not structured as much of voluntary advice is,

‘I: And why do you think that individuals seek advice from yourselves rather than other advice organisations?’

R: If there is a long waiting list individual will try and seek advice or support elsewhere and often end up in our centre’ (*William, Manager*)

‘I: Is that [time] something that is appreciated and needed in this situation?’

R: Oh yeah, if a signpost them onto CAB there only get 10 to 15 minutes like you said, whereas I will sit and I will do the form with them I will sit with them and I’ll sell out there application form their ESA, I’ll go to their medical with them, I’ll even go to tribunal’s with them if they fail’ (*Jeremy, Volunteer*)

Redwood provides this service for its local community, as it has built a network of projects that all have advice and support at their core. Advice at *Redwood* is offered on specific themes such as men’s health or veteran’s programmes, however, it is clear that the organisation acts as a safe haven for all members of the community, as they are able to signpost individuals to a close network of organisations if they are unable to help at *Redwood*. This highlights the importance of a community focus that is apparent at *Redwood*, the advice is therefore tailored to the needs of the community, and more importantly to each individual who seeks advice with the organisation. This level of informal advice-giving is also important for volunteers, it allows them to carry out the voluntary work they enjoy without the pressure of structured advice sessions that are determined by targets and requirements.

6.3 Employees at *Redwood*

6.3.1 The Importance of Employees at *Redwood*

Similar to many local community organisations, *Redwood* operates with a limited number of employees (Ellis Paine, 2015). The organisation employs eleven members of staff including three cleaning and maintenance employees and eight others that work on specific projects, using their unique skill sets to manage multiple projects. *William*, the manager of *Redwood* explained the necessary work that employees carry out, stressing that it should not be left to volunteers to carry out the role of an employee. It is instead the role of volunteers to complement employees, working alongside them without taking on the added responsibility that comes with being an employee at *Redwood*. Therefore, employees are a significant part of the structural make-up of *Redwood* that allows projects to be delivered in the best possible way,

‘We could run an organisation with no staff but it would soon fall down, you’ve got to have that structure in place’ (*William, Manager*).

Employees offer an aspect of continuity for voluntary organisations, particularly given the issues that many organisations have with retention and turnover of volunteers (Ellis Paine, 2015). It was suggested that this continuity is important for *Redwood*. A staff member is tasked with coordinating and facilitating the work that needs to be carried out within the organisation. Therefore, they manage the volunteers and ensure that work is carried out if a volunteer is not available, adding to their level of responsibility. This is of particular importance when dealing with sensitive issues and vulnerable individuals, which is commonplace for the organisation across many of its projects

‘You also need them [employees] to take on the additional responsibility around safeguarding and evaluation so they need to ensure that certain protocols are in place, especially if you’re working with vulnerable adults and children or young people’ (*William, Manager*).

The roles of staff members who were interviewed were varying, although both were employed as lead employees on projects. *Antony* had been involved in community development employment for a number of years and therefore had a rare insight into his current role managing the young people involved with the employment programme. His wealth of community experience allowed him to offer insight and advice to these individuals, offering many skills to the organisation as a whole as he often provided insight into a number of other projects from wider community knowledge. *Adam*, on the other hand, works on the veteran's programme and is one of two members of full-time staff on the project. As a veteran, *Adam* understands the needs of the service user and therefore the work he is able to conduct would be difficult to provide from another members of staff. *Adam* was one of the original service users of the programme, and therefore is able to understand the experience of the service user throughout the programme.

6.3.2 Motivation for Employment

The motivations for working at a voluntary organisation can differ, although many are rooted in past experience, community development and helping others (Cunningham, 2001; Nickson et al., 2008; Brodie et al., 2011; Lee, 2016). *Adam* had been involved with the veteran's programme since its conception in 2010. He was the first individual to go through the buddy process with the programme, it was during this that *Adam* and *William* found a significant need for the expansion of this programme in the local community,

‘We decided that, after research and all that, it was a case of, there is a need. So, we looked into it and then we came up with the idea of a, “One Stop Shop”, for veterans where you tell your story once because a lot of the lads were saying, “Everywhere I’ve got to go, I’ve got to tell my story”’ (*Adam, Employee*).

Motivations are not solely drivers to join an organisation in the first instance, but also influence the continuation of employment. *Adam* stated that he enjoys the work he carried out at *Redwood*, this is largely because he is now working with like-minded people, as opposed to previous occupations where this was not the case. Concurrently Ellis Paine's (2015) and Phillimore and

McCabe's (2015) research in the voluntary sector suggests working alongside individuals who have similar motivations provides a comfortable working environment that can ultimately lead to positive retention of employees and volunteers,

‘I needed that help and I got it via *William* and other guys that were there at the time and we worked through it, supported by each other and then you realise, “I want to give something back now”’ (*Adam, Volunteer*).

Similarly, *Antony* has also been involved with *Redwood* for a number of years, having worked with the organisation for five years and then taking a break before taking on his current role. *Antony*'s motivation for working in a voluntary organisation can be associated with his previous experience of community work. He states that

‘My previous experience was working in the community, as a community practitioner but self-employed’ (*Antony, Employee*).

6.3.3 Challenges for Employees

There are a number of challenges for both employing staff in an organisation and for being a member of staff at a voluntary organisation. One of the biggest challenges for being employed at a *Redwood* is the targets that employees must meet on specific projects. These are sometimes difficult to reach and employees have to work above and beyond in order to ensure targets are met for funders and service users. This creates complicated workloads for employees, a phenomenon that is recognised by the manager of *Redwood* who describes the staff as

‘A stretched and overworked group of individuals’ (*William, Manager*).

Furthermore, maintaining a paid workforce is difficult in the current economic and political climate (Harp et al., 2017). It is stated by employees that funding alterations are putting pressure on current employees and the organisation as a whole. Some funding changes, particularly those from the local authority have led to the loss of community workers. Despite this, employees

recognise that *Redwood* is managed well, and therefore is able to survival through turbulent periods,

‘We are managing to survive, but there are several organisations locally that have collapsed because the money is just not there to keep them going’ (*Antony, Employee*).

Redwood operates with relatively few employees in the organisation, however, the individuals who are employed provide a crucial role to all aspects of *Redwood*. Employees have a level of responsibility that ensures programmes are being operated successfully, allowing the manager and volunteers to concentrate on their own roles. The motivation for becoming an employee at *Redwood* was to join a like-minded organisation and contribute to the organisation’s mission of community development. This was transparent amongst employee interviews and this concentration on the original mission and organisational value was a contributing factor to organisational sustainability in increasingly turbulent times.

6.4 Volunteers at *Redwood*

6.4.1 Volunteering and Relationships at *Redwood*

As *Redwood* is community embedded volunteers provide an unparalleled service for the local area. This thesis supports findings that social policy reforms are particularly affecting voluntary advice organisations and their volunteer advisers (Kirwan, 2017a; Organ and Sigafos, 2017). Whilst *Redwood* is being affected by social policy reform, volunteers are managing change well as they are heavily involved in the development and planning of the organisation as well as their regular role. Volunteers have access to a volunteer representative, whose role it is to listen to the concerns or queries of volunteers and report this back to the management and board of trustees. This ensures that volunteers have a voice within the organisation, and can be involved in the planning and development of the organisation. It has been found that volunteers report successful management and supervision can enhance morale for the volunteer teams (Callender et al., 2018).

The management team has created a working atmosphere for volunteers that is similar to the workplace. Rochester et al. (2010) argue that this creates a corporate environment, a concerning move for voluntary organisations that are driven to create an atmosphere in which individuals can express themselves, especially if volunteering for a hobby. This research provides a counter-argument to Rochester et al. (2010) as one of the focuses of *Redwood* is to provide individuals with the skills needed to enter the workplace through their voluntary role. They do this by providing volunteers with roles and responsibilities, ensuring that all volunteers are equal irrespective of their role within the organisation,

‘The volunteers also have a job description as well, so they have a role and they know what they expect out of us and we know what we can get from them. We ask volunteers to commit to four hours per week minimum, we also expect them to go through a training course as well, to upskill them throughout the year. All volunteers go through a first aid course, health and safety, manual handling and then depending on what their role is they will then do health workshops or safeguarding programmes depending on which one they’re working on’ (*William, Manager*).

The roles of volunteers at smaller, community-based organisations can be complex (McGovern, 2017) and the roles of volunteers at *Redwood* do differ greatly, namely dependent on the skills and expertise a volunteer brings with them to the organisation. *Jeremy* is a volunteer on the veteran’s programme and provides advice on housing and benefits. Whilst he is able to provide advice on many issues, this is a role he is passionate about as he spent many years as a social landlord. *Geoff* has a complex role at *Redwood*, he is one of the lead volunteers on the men’s health project whilst also carrying out a great deal of administration work to support manager *William*. The health project includes work on the communal gardens and allotments, increasing volunteers’ activity levels but working as a team outside. This creates a frustration for *Geoff* as he is passionate about men’s health and the work he has been involved in, but office work can take over,

‘At the moment I’m stuck in the office. I do a lot of paperwork, I do a lot of the ordering... We’ve won a few awards for our garden, but because I’ve been put in here [the office] and [Kevin], as I say, he’s 80 odd, he’s not as fit as he used to be. So, our gardens have gone down the nick a bit, but hopefully, with these youngsters that are coming in we can get it back up to award-winning standards again’ (*Geoff, Volunteer*).

It is important to *Redwood* for their volunteers to feel included in the organisation, this is therefore why the manager and employees of the organisation promote and encourage the service users to start volunteering with the organisation and the particular project they were associated with. This helps individuals build positive relationships with others and the wider community, a concept that is particularly important to *Redwood* providing the sensitive issues individuals seek advice and support on,

‘So, we want them to feel included and a part of the programme, we want them to have ownership of it. We want them to run it with our support, we want to upskill them and make them feel connected to not just the organisation but connected to each other and connected to the community’ (*William, Manager*).

This provides volunteers with a sense of community within the organisation. It was suggested during interviews that quite often volunteers do not see each other on a daily basis, due to the casual and infrequent nature of volunteering. Not only do organisations provide much-needed resources for service users, but they are also instrumental in the well-being of volunteers (Tabassum et al., 2016). This is demonstrated at *Redwood*, particularly with the wide range of volunteers and service users that they interact with and the relationships they can then build

‘[Kevin], he’s 83 but he needs this place to come in to and he enjoys this place, it’s his way of connecting with other individuals and he is useful. He does a lot, he runs the allotment, in the summer he will work with our young person’s project and take them out fishing’ (*William, Manager*)

‘It’s like one big happy family sort of thing’ (*Benjamin, Volunteer*).

6.4.2 Motivations for Volunteering

As *Redwood* places emphasis on community embeddedness and development it is important to understand whether volunteers share this vision in their motivations. These findings henceforth support Rochester et al.'s (2010) work, as the motivations for volunteers interviewed at *Redwood* were altruistic. Other motivations for volunteering have been recognised, including for value or for greater social levels with the local community (Musick and Wilson, 2008). However, it is also suggested that engagement in voluntary action is becoming more individualistic, episodic and goal oriented (Dallimore et al., 2018).

At *Redwood*, much of the discussion surrounding motivation considered the amount of time individuals maintained their volunteer role, with the manager and paid staff in agreement that retention of volunteers was good. *Geoff* is a long-standing volunteer who has been with the organisation for twelve years. The initial draw of the organisation and continuation of his role was based around the friendly atmosphere that the organisation exudes. Many volunteers also provide between three and five days of volunteering per week. The motivations for doing this differed, but a common theme is that volunteering with *Redwood* allows individuals to partake in an activity they enjoy and carry this out with like-minded individuals

‘The people here were so friendly and you could get on with them, you could talk to them about anything’ (*Geoff, Volunteer*)

‘Well, I was coming in every day the week, that’s like five days but have cut them down to three now but I still do the five days’ (*Kevin, Volunteer*)

‘If I don’t come here, I just sit in the house’ (*Sid, Volunteer*).

This corresponds to previous literature that suggests long-term volunteering is promoted through enjoyable work environments and also creates sustainability for the organisation as they have a reliable pool of volunteers to provide services (Phillimore and McCabe, 2015; Nencini et al., 2016).

A further motivation for *Redwood* and one which is not unusual of the voluntary sector as a whole is the effort made towards community development through volunteering (Dallimore et al., 2018). This was visible through all programmes at *Redwood*, but especially with the veteran's service. Interviewees stated that their shared experiences and understanding of the issues raised by service users on this programme was the main motivator for the work they carried out. This allows individuals to provide advice and support in a comfortable manner, interviewees stressed that this was one of the main motivators for choosing to volunteer with *Redwood* over another organisation,

‘Veterans with veterans, we are kind of a bit hard to understand sometimes but we have this banter and you only get in the army, but once you've been in the army and you've got the kind of [banter that] never goes but you miss that. So, come in here you get it, so it's not just a little bit of banter it's full on so it's really relaxed for them’ (*Diane, Volunteer*)

‘It was always taught to me that you always look after each other, you never leave a man [sic] behind, so I didn't realise there were so many of them being left behind so I came here’ (*Jeremy, Volunteer*).

6.4.3 Challenges for Volunteers

There are challenges to running an organisation with volunteers, both from an organisational and a volunteer viewpoint (Rochester et al., 2010). The manager of *Redwood*, *William* articulated these issues in particular, especially regarding volunteer retention. Whilst the organisation as a whole has a good retention of their volunteers, the concentration of social policy to encourage entry to the labour force and the subsequent economic need for individuals to gain paid employment over voluntary work has created a more challenging approach to volunteer retention in recent years.

Volunteers also recognised that volunteer retention is beginning to decline, it was stated that government funding cuts and changes to welfare policy have affected the number of volunteers who are available to the organisation. McDermont (2017) argues that changes to the volunteer role are often not in keeping with a volunteer's view of volunteering. As a result, they can choose to resign from this role or no longer take direction, an issue for both volunteers and management. Despite this, those volunteers at *Redwood* who have maintained their position, are said to be coping well with the significant amount of changes that are occurring in society, a finding that contradicts academic literature provided by McDermont (2017),

‘Volunteers appear to take change in their strides as long as the changes and reasons for that change are explained to them well beforehand. Volunteers need to be involved in changes that impact upon their role’ (*William, Manager*).

Volunteers are the backbone of the *Redwood* organisation as with many voluntary organisations (Rochester et al., 2010; McDermont, 2017). They not only provide much of the advice and support systems within each programme but also have a significant impact on the development of the organisation. The non-corporate working environment that *Redwood* has created has also led to long-term retention of volunteers, it can be argued that this is due to the multitude of roles within the organisation as opposed to one structured working pattern. Significant changes are occurring within the voluntary sector, creating a challenging environment for volunteers due to increasingly complex issues and pressures from funding and other drivers of change such as political forces and the evolving nature of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015; Kirwan, 2017a; Organ and Sigafos, 2017). At *Redwood*, it can be argued that the ability to aid organisational development helps volunteers deal with change in a positive manner.

6.5 Community Importance at *Redwood*

6.5.1 Community Embeddedness

Redwood describe their organisation as being embedded in the local community. They signified that for the organisation this relates to the level of focus they put on the needs of the community and the ownership that they feel the local community has over the services and projects that are delivered through the *Redwood* to aid development of the local area.

The importance of community differs for voluntary organisations, largely depending on their size and mission (Kamerāde and McKay, 2015; Phillimore and McCabe, 2015). *Redwood* is located in the centre of a local community, at a convenient location for service users to access should they need to, demonstrating the openness of the organisation

‘I think people feel safe here, they can just come in and make a cup of tea or coffee as well at no cost. In the summer we get people that come and sit in the gardens as well, it’s just a place for them to be and they know they will get the help and support if they need it’ (*William, Manager*).

The importance of the community to the organisation is demonstrated by their relationship to the individuals in the local community. It was shared that service users largely derive from the local area and it is those individuals whom the organisation strives to create change for. The organisation assesses their needs, locates funding and creates programmes to meet the requirements and aid development of the local community. This is enhanced by the recruitment of staff and volunteers from the community, it is argued that they have a greater understanding of the needs of local individuals than those who had been recruited from outside of that community. This corresponds to the work of Knight (1993) as it is suggested that this ability is less likely to occur at *Federal* organisations due to their nationalised agenda that can be applied to their local structural make-up.

It is clear that *Redwood* is embedded in the local community, but further to this, the organisation strives for ownership of the organisation by the community. It is important to them that service users feel valued and involved in the development of the organisation,

‘It’s embedded in the community as well, also as well the local school, we do loads of programmes with the school as well which is really good. So, we want the centre to be a part of the community as well and we want it to be embedded in the community and to have real ownership by the community. You’ll find that only a small part of the work we do is centre based, a lot of it is out there and rightly so. We should be out there in the community’ (*William, Manager*).

The relationship between volunteers and the community is a further aspect that is important to consider to further understanding of *Local* voluntary advice provision. The relationship between volunteers and the community is a further aspect that is important to consider. Literature reveals that volunteers can develop this relationship through contributing to the community in a number of ways, usually for a shared purpose or interest. It is this desire to provide a service for the local community that enhances the relationship between an individual and the community in which they are volunteering, whether this be regularly, through an employment scheme or more episodic (Rochester et al., 2010; Phillimore and McCabe, 2015). Interviewees at *Redwood* further these findings as they shared the emphasis they put on the importance of community as well as that of the organisation as a whole. As volunteers engaged directly with service users for the majority of roles at *Redwood*, interviewees demonstrated the relationships they have built with members of the community that use the services of the organisation. This is apparent even if volunteers do not directly engage with service users, *Benjamin* takes part in casual volunteering, where he helps out in general tasks with the organisation as opposed to on a specific project. However, he recognised the importance of the organisation for the local community and the service it provides for them

‘Some people use it for the computers doing the job searches, other people just come in to see what’s going on’ (*Benjamin, Volunteer*).

For volunteers, it is important that the organisation continues its engagement with the community, and the activities that it conducts outside of the centre. This promotes a closeness between the organisation and the community that volunteers feel gives *Redwood* a unique relationship to service users and their needs compared to other more corporate organisations in the area that operate on a more objective basis.

6.5.2 Deprivation and Advice-Giving

Liverpool has been disproportionately affected by austerity measures and social policy reforms such as benefit sanctions, which has subsequently affected the levels of deprivation in the area (Beatty and Fothergill, 2014; Jones et al., 2016; Organ and Sigafos, 2017). Liverpool remains in the top five regions with the most neighbourhoods ranked as deprived across a number of indices (Department for Communities and Local Government, 2015). This trend is experienced within the *Redwood* organisation, as the organisation has experienced government cuts that directly affect the local area and nearby organisations that provide supporting services to *Redwood* being closed. This impacts on the demand for *Redwood*, as they are now working with individuals who have a greater need for advice and support, with fewer organisations to visit, a notion that could significantly damage the health and well-being of the area,

‘The cuts in the government spending though have really impacted on the local community and impacted greatly where I’ve seen resident groups and community groups over in the past five years who have been historically delivering good pieces of work in the community folding’ (*William, Manager*)

‘Due to 10 years of cuts to the third sector, the financial hardship is impacting upon individuals physical and mental wellbeing...services are stretched beyond breaking point’ (*William, Manager*).

The effects of austerity have taken hold of much of society, however, those who are more deprived are also more vulnerable and susceptible to the effects of government reforms (Organ and Sigafos, 2017). Findings from *Redwood* highlight that the role of the organisation in recent years has been to support individuals in navigating their way through governmental reforms as many service users have not been able to access the support services, they need from government agencies. The organisation is conscious of being susceptible to mission drift with this shift to social policy concentration and potentially away from community development. Mission drift is further discussed in sections (2.3.3 and 6.5.3), however, interviews at *Redwood* both support and contrast literature on mission drift. Findings at *Redwood* dismiss Chapman's (2017) argument that a concentration of funding causes mission drift as *Redwood* are able to adapt their funding patterns to meet the needs of service users. However, Aiken and Harris' (2017) notion of small and medium-sized organisations being 'hollowed out' can be tentatively supported at *Redwood*. This is because *Redwood* is placing an increased amount of concentration on meeting and offering mainstream services, although these services are in alignment with the needs of the local community. *Redwood's* ability to adapt to the needs of service users is becoming more difficult as a result of social policy reform as the organisation is experiencing increases in demand and service users finding it more difficult to navigate changes,

‘It appears from talks to them [service users] on a one-to-one basis that they feel things are being done to them rather than for them. That they don't feel engaged in the political decision made by the decision makers. That they feel disconnected to government both local and national, they have their own agendas’ (*William, Manager*).

The services that are offered by the organisation have begun to frame the effects of austerity in the local community

‘This local community is very deprived and there is a lot of sickness, ill-health, mental health, unemployment, poverty and crime’ (*Antony, Employee*).

Therefore, programmes such as the youth employment project allow the organisation to provide the local community with the skills and opportunities needed to begin to move away from deprivation.

6.5.3 Identifying Gaps in Advice Provision for the Community

Chapman (2017) and Aiken and Harris (2017) discussed specific forms of mission drift that can be applied to this research and the organisations that have been studied (discussed in sections 2.3.3 and 6.5.2). Their findings can be applied to *Redwood* as the research made it clear that the organisation contrasts the literature regarding mission drift. Whilst the organisation meets the mainstream needs of society by providing necessary services (Aiken and Harris, 2017), they reject the notion of funders dictating the service that they provide (Chapman, 2017). *Redwood* instead strives to find gaps in provision in the local community as opposed to chasing available funding and continuing a project that is not needed and would not be a successful use of resources

‘Development-wise, I identify gaps in the provision in the community and then build a programme around that, and try and secure funding’

‘We try to avoid duplication as much as possible so it’s trying to identify gaps, pulling partners together to share resources where possible, and then that way you get a more rounded programme that’s a little bit more sustainable’ (*William, Manager*).

This system has created positive results for the organisation, as other voluntary services in the local area have not been sustainable in the era of austerity. The approach of *Redwood* is to operate in a non-uniform way and a way that suits the community as opposed to the sole needs of the organisation. The identifying of need in this way allows the organisation to highlight a need or issue in the community at an early point, and then involve all in the organisation in building a programme. *Redwood* works with individuals in the community to resolve queries before they become a larger issue that the organisation perhaps could not handle. This further allows the

organisation to break down barriers, not only overcoming issues in the local community but providing an opportunity for growth and development. The role of voluntary organisations in promoting community development is important to understand in the context of *Redwood*. Voluntary organisations often play a key role in community development as they have built successful and trusting relationships with the individuals and have a greater sense of community action, unlike private and public organisations (Gilchrist, 2016).

Relationships are incredibly important to smaller, more community-based organisations, as they allow organisations to build a network and work together to enhance community and voluntary action (Ellis Paine, 2015; Phillimore and McCabe, 2015). This is no different for *Redwood* as they describe themselves as multi-partner, working with multiple agencies to find the best solution possible for service users, even if this is a referral to another organisation. This network is not only made up of relationships with voluntary organisations, although *Redwood* has been recognised by national voluntary organisations for their work. The organisation has built successful relationships with the local authority, which can be observed to be a bridge between service users and the community and government agencies. This is a particularly important relationship to build as it allows individuals in the community to build trust with the council and wider government initiatives (Jones and Meegan, 2015),

‘We work very closely with our City Council, where we are their representatives to do the work... Those relationships have been built up over time and we work very closely with the Deputy CEO of Liverpool City Council and we can hold regular talks and discussions and all that, because we’re not a loose cannon outfit, we’ve got everything in place’ (*Adam, Employee*).

The structure of *Redwood*, as a *Local Empowering* organisation embedded in the community provides the organisation with many positive outcomes. Most importantly regarding their resilience to change and community needs, as the organisation has ownership of the building, so can adapt services to meet the needs of the community over funding or premises concerns

‘I: What are the advantages of being an independent organisation without an affiliation to a national brand?’

R: We can get things done quicker, no red tape or bureaucracy in place, a better understanding of local issues impacting on local people. We can develop local networks and partnerships without having to go through a national body...ownership of our buildings gives us some form of sustainability, it brings in revenue which pays for the upkeep of the centre’

This is because they are able to identify holes in the provision for the community, meeting the needs of service users and then attracting funding to meet these needs as opposed to tailoring advice services to funders that may overlook the needs of service users. Despite these positive findings, research at *Redwood* demonstrates that the effects of austerity and social policy reform are damaging for the local community, in which the organisation is embedded. As a result, this creates a more difficult advising climate for a *Local Empowering* organisation due to the complexity of issues being dealt with and the loss of other voluntary organisations in the local area which can subsequently drive up demand for *Redwood’s* services.

6.6 The Drivers of Change

6.6.1 Funding Provisions at *Redwood*

The political forces and funding drivers of change significantly affect the experiences of social policy reform and the provision of advice at *Redwood* due to their close relationship to the needs of the community and service users. The final driver of change, the evolving architecture of the voluntary sector, is also important as the structure of the organisation and the provision of advice is vastly different at *Redwood* compared to *Sierra* and *Acadia*. However, this is considered and elaborated in section 7.3.2 as the changing role of a voluntary organisation is discussed through a comparison of all three case study sites.

Funding in the voluntary sector is complex, it is often provided in short terms with stringent requirements attached to it, in which the organisation as a whole has to meet in order to fully secure the funding (Lowe, 2017). Whilst *Federal* organisations have been identified to strive to meet the needs of funders (Bowen-Huggett and Kirwan, 2017), *Redwood* rejects this system in favour of utilising a number of different funding streams that best suit the needs of their service users and the wider community

‘What we don’t do is chase the funding, it’s about the needs and identifying the need in the community. How do we do that? Well, we do that by talking to community groups, resident groups and people, our beneficiaries and we sit down and ask them what they need. We ask them ‘are we doing stuff, right?’, and things like that. ‘Are we delivering things that you actually need and at a level that are OK for you?’’ (*William, Manager*).

Funding partners are drawn from a number of areas, including neighbourhood funding, government bodies such as clinical commissioners and the police force as well as grant-making bodies and a small number of donations. However, one of the most unique aspects of *Redwood*’s funding mission and a system that sets them apart from many others in the voluntary sector is their ability to raise their own funds

‘We aim to bring in a quarter of what we raise ourselves, through the building’ (*William, Manager*).

The organisation owns their own buildings and can, therefore, generate funding through the rental of space. This can significantly impact on their sustainability, as funding is one of the key instigators of the closure of a voluntary organisation (Chapman, 2017). The ability to produce their own funding ensures that *Redwood* is able to sustain many of their programmes should they encounter any other financial or structural difficulties.

Redwood feels that whilst funding is important for the sustainability of the organisation, it is more important to maintain the mission and values of the organisation in order to maintain valuable services for the community. This corresponds to Chapman’s (2017) argument that effective

management skills and identifying the wider picture of the organisation are important for the overall sustainability of an organisation. If management is too focused on the receipt of funding streams that may not particularly meet the requirement of the organisation, this can be more detrimental than not receiving funding at all. Therefore, the ownership of the building allows the organisation to avoid the seeking this type of funding, as general upkeep can be covered by rental income

‘Ownership of our buildings gives us some form of sustainability It brings in revenue which pays for the upkeep of the centre - we can't secure enough revenue though to be fully sustainable, we continue to strive towards full sustainability but are restricted by the size of our centre’ (*William, Manager*).

There are, of course, issues that come with receiving outside funding that cannot be avoided. *Redwood* has found that funding partners that have been providing funding for core services for in excess of fifteen years are no longer able to provide consistent funding. This has the ability to significantly harness the progress of the organisation, however, the exceptional viewpoint of the organisation allows growth to continue as *Redwood* focuses on their core aims and objectives

‘Partners who I’ve worked with for like 15-20 years are no longer there, and they’re some of the partners where the funding came from. So, if you haven’t got the partners, you haven’t got the funding, you can’t deliver what you used to deliver. So, we have to go back to our core aims, our core objectives. We’re lucky we’ve got enough funding to keep things ticking over for the next three years, but we don’t want to rely upon that funding because it can go dead quick so we need to continue to push’ (*William, Manager*).

Further to this, funder requirements and clawback provisions are ever more apparent in the voluntary sector, pressurising managers, employees and volunteers to provide services and meet targets, often providing different forms of accountability (Glennon et al., 2017). Although *Redwood* does not ‘chase funding’ and keeps the core aims of the organisation at the forefront of its operation, they have felt the pressure of targets from funders. Although at *Redwood*, funding

is gathered to meet the needs of the local community many issues associated with funders such as specific demographics (as discussed in *Sierra 4.6.1*) can be avoided, there has been a general loss of funding provision for the organisation. This is related to with the complex nature of funding for the voluntary sector (Alcock et al., 2012; Corbett and Walker, 2012; Kirwan, 2017a; Organ and Sigafos, 2017), and funding as a key driver of change for voluntary organisations (Kellock Hay et al., 2001; Cameron and Green, 2015). This does create an increased pressure for volunteers and employees as roles become more complicated as they are aware of the losses of funding.

6.6.2 *Redwood's* Experience of Social Policy Change Post-2012

Change in any organisation is inevitable with the fast-paced movement of the social and political economy, having already occurred for many organisations and will continue to do so (Macmillan, 2010; Glennon et al., 2017). This is not unusual for *Redwood*; however, they are reversing the trend that many voluntary organisations face. Whilst they are experiencing some changes to their operation, much of the change that is occurring is positive, in the form of new programmes or expansion. For instance, the veteran's programme has undergone a transformation to become a charity in its own right. *Redwood* was the instigator of this as its founder, at the time of interviews the organisation had secured funding to continue running the programme for a significant amount of time,

‘We’ve just secured £355,000 from the Big Lottery to run that programme for three years. So that programme engages around 250 individuals a year’ (*William, Manager*).

This recent transformation is one of many for the programme, as they have experienced a rapid growth due to demand from the local community and a lack of similar services in the local area

‘From initial concept, there was eight of us trained as Buddies. We’ve now trained 65 people to be Buddies... Our project has gone from a room in [*Redwood*] with half a dozen

of us which then grew and grew and grew and then we decided we needed a One Stop Shop for veterans which we've got now and we've been open now for four or five years... And then having big organisations, or national organisations turning round and saying, "We want to partner with you because what you're doing is the best that there is in the area." Now, I think that's one big achievement for a local charity being approached by national charities to say that they want us to work with them' (*Adam, Employee*).

The increase in technology for voluntary organisations is not a new phenomenon, and it has been met with both positive and negative opinion (Harris, 2017). This is a positive move for *Redwood* on many of their programmes. The introduction of more technologically advanced systems has created more work initially for some volunteers, however, they appreciate the ease of use and positive outcomes this can have for the organisation as a whole

'A lot more data protection than I used to have now like said everything is more digital which I like, I didn't like too much paperwork but like the digital, so like that aspect of it and everyone can follow everyone else. So, as I'm off sick, so in theory, someone could step in and do my job whereas before they couldn't (*Jeremy, Volunteer*).

This positive view is not shared by all volunteers, with many preferring to be working with the community and face-to-face with service users than carrying out administrative tasks with new technologies. For instance, *Geoff* works on multiple projects having been with the organisation for in excess of ten years and has recently been assisting with more administration as demand for projects has increased. This has created frustrations as workloads have increased, with fewer days being taken as a holiday or away from the organisation due to the increased pressures,

'At the moment I'm stuck in the office. I do a lot of paperwork...It's only in the five years I've been, sort of, stuck into more office work which was helping [*William*] and because he's got the veterans up and running now, he needed a bit more work that he couldn't handle' (*Geoff, Volunteer*).

This increase in pressure for volunteers can also be associated with advice-giving as it is a complicated role to undertake as an unpaid volunteer (Kirwan, 2017a). Although many projects offer informal advice, volunteers and employees are aware of their role in providing help and support for service users, projects and roles are arguably changing to meet these needs.

These changes have not only affected employees and volunteers, but the role of manager *William* has also altered under funding and social policy reform pressures. *William's* role was previously heavily involved with community development as his main role. However, due to funding and concerns of sustainability, the importance of his role has been shifted to securing funding to ensure the sustainability of the organisation

‘My role is actually director of funding and development... development wise I identify gaps in provision in the community and then build a programme around that, and try and secure funding’ (*William, Manager*).

This came about following an organisation wide decision, as a reaction to drivers of change, highlighting the importance *Redwood* places on the internal structure of the organisation and ensuring that it does its utmost to ensure continuity for the community. This has created a more complex role; however, this is not unusual across the organisation, with more paperwork now needing to be completed, taking individuals away from the more service user-facing roles that they had previously undertaken.

Not only have individual roles changed, but the organisation as a whole has also undergone significant changes. However, this contains more negative changes than those individual ones. This is a theme that is occurring across the voluntary sector, although this does differ between types of organisations. For instance, it is understood that larger, more corporate organisations have a stronger system in place to deal with change than smaller, community-based organisations which can ultimately lead to less disruption caused by change for these larger organisations (Civil Exchange, 2016). Findings at *Redwood* contradict this literature, as although they have had to

create significant changes to the organisation, they have done this to best suit the community and ensure that they are sustaining programmes and advice provisions for service users to utilise,

‘We’ve had to streamline the organisation as well, we’ve had to look at loads of cost-cutting exercises, what do we need to do in order to keep providing that support to our community? What things can we reduce or do without?’ (*William, Manager*).

Change at *Redwood* has been multifaceted, they have been affected by some of the most significant changes in terms of political, economic and social policy reform, subsequently impacting their levels of demand and complexity of issues that are being faced by their service users. However, a great deal of the change experienced at *Redwood* is positive. For instance, the organisation has experienced an expansion of their programmes that allows for further resources to be provided for the community. In addition to this, an increase in technological change for volunteers has been met by praise, this provides them with a professional working environment despite the need for an increased level of paperwork, ultimately making their voluntary role easier.

6.7 Chapter Summary

This chapter has examined the *Redwood* organisation, analysing their provision of advice as well as the experiences of social policy reforms for the organisation as a whole and the manager, employees and volunteers involved with the organisation. These results were drawn upon by qualitative interview quotes to build a full, representative picture of the organisation and address the following research questions:

- II. What is the perception of social policy reform and austerity measures of managers, employees and volunteers in voluntary advice organisations?
- III. What are the challenges and opportunities for voluntary advice organisations in the current policy context?

IV. To what extent does the local community impact on the provision of advice by voluntary advice organisations?

Advice is provided in an informal manner on a wide range of projects. This offers a unique process of receiving advice and support for service users, as opposed to the interview style of advice-giving that is available at other organisations (such as *Sierra* and *Acadia*). It is through this process that *Redwood* is able to ensure they are empowering individuals as opposed to offering advice that would be a short-term ‘fix’ for their issues. The organisation has witnessed an increase in demand for their advisory services following a number of advice organisation closures in the local area and the significant level of deprivation that is occurring in the community. The employees that are involved in the provision of advice and the projects through which it is delivered are limited but offer an extremely important role. They have a significant level of responsibility within the organisation to ensure projects are operating correctly. As well as this, interviews revealed that employees also feel they have a level of responsibility to the local community and the development of the skills of individuals who use *Redwood*’s services. The volunteers at *Redwood* are at the ‘front-line’ of advice-giving and support for service users, but they also play an important role in the development of the organisation. Due to their involvement in development, volunteers are able to deal with change well as they have accrued many skills across the organisation.

The organisation is fully embedded in the local community, it seeks to find a need for the local individuals and address the issues they are facing. The organisation places emphasis on the community feeling as they have ownership of the organisation and that it is in place to best serve them. A close association to this concept is the complexity of funding for *Redwood*. Whilst funding patterns are complex, a theme that is not dissimilar for many voluntary organisations, *Redwood* feels it is important not to chase funding for projects and be required to provide services that may not meet the needs of the community. Instead, the organisation is able to maintain their core services through the ownership of their main buildings that can provide a monthly rental income, therefore allowing them to maintain their mission and aid community development.

This thesis argues that the embeddedness of the organisation in the local community enhances the relationship between advisers, both employees and volunteers and the local community. This is because the organisation feels that the community has ownership of the organisation, allowing *Redwood* as a *Local Empowering* organisation to recognise the needs of service users and respond to that need. This chapter concludes that *Redwood's* ability to produce their own income, coupled with carefully selecting funding pots allows them to be in control of their own sustainability and advice-giving procedure.

Austerity and social policy reforms are disproportionately affecting the local community. *Redwood* has, therefore, experienced an increase in dependency on the services of the organisation as a direct result of this. The increase in complex issues that are being brought into the local community as well as a reduction in community-wide activities can affect morale and the experience of the organisation. In summary, the unparalleled aspect of advice-giving at *Redwood* allows the organisation to work alongside the community, equipping individuals as well as employees and volunteers with developmental skills.

This chapter demonstrates that the complex issues that are dealt with at *Redwood* as a result of social policy reforms are affecting the organisation both positively and negatively. The organisation shifts the focus of projects to meet the needs of service users, which can often be multifaceted and fast-paced, following the trends of recent social policy changes. This ensures the skill-building services of service users and that needs are being met within the community. However, the role of volunteers and employees becomes more difficult as a result. They have to keep up with these changes ahead of providing support and advice through the projects, an already demanding role. Despite this, this thesis determines that the strong concentration on service user's needs in this way can develop the skills of service users to navigate issues themselves in the future, which the organisation feels would not be possible if they provided advice in an interview-style as opposed to targeted projects.

7 Discussion

The main aim of this thesis is to understand the perception of social policy reforms for differing structures of voluntary advice organisations, their staff and volunteers in the Liverpool City Region. The use of a multi-site case study enabled a comparison of three different forms of voluntary advice organisations and the identifications of the differences in their provision of advice, as well as their relationship to the local communities that rely upon their advisory services. With these two factors considered, a main concern of the research was to elucidate the challenges and opportunities for voluntary advice organisations in the current policy climate. This chapter argues that challenges and opportunities are experienced differently due to the organisational structure of voluntary advice organisational structures. This argument is explored in this chapter through the contrasts and comparisons of the organisations across three main themes that emerged from the research; *advice*, *community* and *the drivers of change*. First, *advice* is considered, exploring the way in which each voluntary advice organisation perceives and delivers advice. Secondly, *community*, the relationships between each organisation and their local community and the challenges or opportunities this can create. Thirdly, the chapter will conclude with a discussion of *the drivers of change*. In particular the drivers of change that have been highlighted throughout the thesis, the implications of these and how these changes are experienced by voluntary advice organisations. This chapter and wider thesis contributes to the existing knowledge of voluntary advice organisations by providing an understanding of the provision of voluntary advice and the experiences of change that occur for organisations and advisers within them, providing a possible opportunity for voluntary advice organisations to identify and manage these changes in the future.

7.1 Advice

In order to address the central question of the study, which is the differences in the experiences of social policy reforms for voluntary advice organisations, it is important to consider the

differences in the provision of advice for the three organisations involved. This research demonstrates that advice cannot be understood as one umbrella term as it differs significantly between the three structures of organisation included; *Federal*, *Local Providing* and *Local Empowering*. This thesis highlights that *Local* voluntary advice organisations, especially those that are *empowering* in their action have more autonomy to design and deliver advice that is focussed on the needs of the service user. Advice provision can therefore be subject to change at *Local* organisations but this is largely due to the multifaceted needs of service users rather than meeting the requirements and targets of funders.

Sierra, a *Federal* organisation offers advice in a structured and corporate manner as prescribed by the regulations of the national charitable body that they are a local branch of. *Acadia*, a *Local Providing* organisation has undergone a transition from *Federal* to *Local* organisation however still retains some corporate structure and therefore provides advice *for* those in need. On the other hand, *Redwood*, a *Local Empowering* organisation offers advice on multiple programmes working *with* those in need of advice and support.

7.1.1 Hierarchies in Voluntary Advice Organisations

This thesis articulates that hierarchies at voluntary advice organisations can have a significant impact on the provision of advice, depending on the extent and regulation of employee-led projects. All three organisations involved in this research operate with hierarchies and the complexities of roles within these are worsening. Volunteers at all three case study sites provide the most amount of advice, with a smaller team of employees providing more specific themes of advice. At *Sierra* their *Federal* structure and the restrictions put on the organisation by the national body is creating a complex movement of staff on projects with employees moving between projects as funding cycles end. This is creating a confusion for service users regarding the provision of advice at the organisation, a finding that is not applicable at *Local* organisations. This mirrors the process of Citizens Advice that also use multiple levels of staff to deliver advice, an organisation where much academic research regarding voluntary advice is rooted (Abbott,

1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). *Acadia* also follow this framework given their previous *Federal* structure. However *Local* organisations demonstrate a more flexible hierarchy in terms of advice provision with greater emphasis on volunteers as front-line advisers supported by employees rather than employees being fixed to one role that deals with a particular criteria of service user.

This thesis argues that *Federal* organisations and those of a *providing* action are heavily influenced by external funding and the increased need for entrepreneurialism in the voluntary sector. Wider literature states that managers of voluntary advice organisations are becoming more entrepreneurial in their search for external funding, which is allowing more emphasis to be placed on employing specialised employees and delivering advice on a number of levels (Clarke, 2017). However, due to the effects of austerity voluntary advice organisations have also lost a large number of employees and have therefore sought to redefine their advisory services (Organ and Sigafos, 2017). This has been observed at *Sierra*, as the organisation has a number of levels of staff within their organisation, all of which offer advice to differing extents. Whilst the research provided by Clarke (2017) and Organ and Sigafos (2017) supports this finding, volunteers in this study highlighted that the multiple levels of advice at *Sierra* can be inconsistent and therefore service users can feel confused by the process of advice at the organisation given the multiple layers of staff. Interviews at *Sierra* also revealed that specialist workers often move between projects, although the increasing frequency of restructuring was making this less possible. This is similar to literature provided by Organ and Sigafos (2017) as it is stated that increased internal change is occurring for voluntary advice organisations, ‘agencies have responded to these internal changes by altering the manner of service delivery and increasing the use of volunteers’ (2017: 171). Further to this, *Sierra* experiences the highest turnover of employees than the other two case studies, which can also add to the confusion surrounding the provision of advice described previously. It is also argued that this high turnover can have negative effects on the organisation but also be due to the multiple and complex roles that employees must carry out at a voluntary advice organisation (McDermont, 2013; Lee, 2016).

The same cannot be said for the provision of advice at *Acadia*, whilst they provide advice on a similar number of hierarchical levels to *Sierra*, they are able to sustain specialised workers without an effect on service users. This has been found to be beneficial to employees as they are able to retain their training and experience to be used elsewhere in the organisation (Organ and Sigafos, 2017). This is of particular importance to all three case study sites, but particularly *Acadia* as they have maintained consistency in their advice provision. Although they have multiple levels of staff that provide advice, each level of staff is underpinned by what McDermont (2013) describes as the act of translation. This occurs where advisers translate the experiences of service users into the sphere of legal advice or social policy and also have to translate these laws and policies back into the lived experiences of the service user. This is a theory that can be applied to voluntary advice organisations within their provision of advice, however most clearly at *Local* organisations due to the levels of transparency in the roles of each staff member and their role in the provision of advice.

Whilst advice at all three organisations is delivered largely by volunteers, *Redwood* does not operate with larger teams of specialised staff unlike the other case study sites, but volunteers do work alongside a select group of employees on a daily basis, both in projects and as an organisation overall. Knight (1993) argues that volunteers are often deterred from volunteering if they are to be working alongside and carrying out a similar role to a member of staff who is being paid. This is particularly prominent at *Local* organisations and can, therefore, diminish voluntary action.

Voluntary advice is susceptible to fast-paced change, this is also the case when considering the process of advice giving. Many organisations are now redefining their advice services to best suit the needs of service users, for instance increasing the levels of self-help, providing evening advice sessions and the increased requirements for telephone and online advice (Harris, 2017; Organ and Sigafos, 2017). Unlike the organisations *Sierra* and *Acadia*, *Redwood* provides their advice on this framework, with the service users' needs at the core of their provision. Advice is provided by all, regardless of hierarchy in an informal manner (see section 6.2.1). This system of advice

giving at *Redwood* allows them to tailor projects and therefore advice to the local community and their demands at any given time.

Advice is delivered on many levels by many members of staff within voluntary advice organisations. However, the effectiveness of this both for the organisation and the service users differs, often due to external funding patterns, opportunities for new specialist skills or the needs of the wider community and service users. *Sierra* offers advice on the most amount of levels, whilst this has benefits, the frequency of restructuring arguably due to their *Federal* structure can result in confusion for service users. *Acadia* is able to move their employees between projects more easily, with staff members across the hierarchy partaking in a similar process of advice giving such as the act of translation, which does not occur as readily at *Sierra*. On the other hand, whilst *Redwood* still operates with a hierarchy of staff members, advice is largely provided by volunteers with little disruption from employees.

7.1.2 The Complexity of Advice-Giving

This thesis concludes that the process of advice giving and the role of being a voluntary advice organisation in society is becoming more complex, particularly following the introduction of austerity measures and recent reforms in social policy. This conclusion can arguably be associated to the close proximity of each of the organisations (see Appendix Seven), the similar levels of deprivation in their communities (Department for Communities and Local Government, 2015), and the issues that their service users are therefore dealing with (Organ and Sigafos, 2017). Organ and Sigafos (2017) argue that the Coalition and subsequent Conservative government's welfare reform regimes have had drastic consequences for the post-industrial towns in England. In particular, the Welfare Reform Act 2012, continues to have a substantial impact on the individuals in the Liverpool City Region, the fieldwork site of this research, as one of the worst affected areas in the country (Beatty and Fothergill, 2014; 2016; Jones et al., 2016). Further to this, as issues and challenges faced by individuals in society are becoming more complex, demand is increasing for voluntary advice and support systems, although wider research has revealed that

many individuals feel that their need for welfare benefits advice, in particular, is unmet (Organ and Sigafos, 2017).

This, therefore, supports the argument put forward by this thesis that demonstrates issues being dealt with at voluntary advice organisations are becoming more complex, complicating the provision of advice. For *Acadia*, the level of complexity that was experienced within the organisation was also enhanced by a recent emphasis on self-help processes due to demand levels. This was creating hostile relationships between advisers and service users, who were interested in gaining the most amount of support possible to 'fix' their issue or concern as soon as possible. As service users are presenting more complex issues, and demanding more in-depth advice, the process of advice-giving has become more complicated at the organisation. Advice sessions were reportedly becoming more detailed creating longer waiting times for other service users, putting pressure on advisers who are aware of the growing number of service users in the waiting room. This is similar to findings proposed by Bowen-Huggett and Kirwan (2017) that suggests advisers are being pushed to increasing limits as they take on a significant amount of work and pressure in their voluntary role. It has been found that in Citizens Advice organisations, advisers complete service user interviews, write up case notes, before continuing to deal with a waiting room of other service users 'and what we're seeing, of course, is more and more advisers burning out because you can't keep giving that level of support and not venting' (Bowen-Huggett and Kirwan, 2017: 51).

Similarly, increased complexity is also an issue at *Redwood* although this does manifest itself in a different manner. *Redwood* provides advice on a case-by-case basis; therefore, advice differs between projects and between service users. Levels of complexity at *Redwood* are increased, as the organisation is unable to provide straightforward answers to their service users. There is little academic literature that relates to this finding, a gap that this thesis fills as it demonstrates the levels of demand for the services of voluntary advice organisations in a period of significant social policy reform following the Welfare Reform Act 2012.

Lindsey (2013) suggests that areas of high deprivation are suffering from an increased number of voluntary organisations that are closing down, organisations that offer more specialised services are more likely to remain in operation. It can, therefore, be argued that this can put pressure on multi-function or general organisations such as *Redwood* to meet the demand of the local community. Therefore, increases in issues and operational complexity are brought to the forefront as service users have limited options for alternative organisations. The process of providing advice for *Local* organisations is therefore complex. However, the structure of *Local* organisations does not require them to adhere to regulations set by a national charitable body and as a result they have the ability and freedom to adapt and develop their advice provisions. Although this can provide *Local* organisations with greater autonomy to meet the needs of service users, this can also enhance their experience of complexity as they can adapt their provisions in line with social changes, which can often be fast-paced and multifaceted.

7.1.3 The Impact of Change on the Provision of Advice

This thesis argues that advice provisions are subject to change, at both *Federal* and *Local* voluntary advice organisations as a result of the current era of austerity and the fast-paced social policy reforms that are emerging from government decisions.

For *Sierra*, the main elements of change for advice that occur are related to funder expectations. It was found during interviews that funding cycles provide the organisation with a great deal of change as the expectations on the advice that is provided, the demographics of service user and length of appointments can all be subject to change. This is a similar finding to McDermont (2017) who suggests that these findings can also deter volunteer retention. *Sierra* places emphasis on these requirements and alters their advisory services to meet the needs of the funder as opposed to the needs of the service user. This creates an atmosphere of consistent change within the organisation, with terms being altered for employees, volunteers and service users alike. Lowe (2017) argues that whilst this phenomenon is occurring throughout much of the voluntary sector, driven by the demands of funders, the complexities that occur in the lives of service users and

therefore the operations of voluntary organisations should remain at the forefront of voluntary sector services. This is applied to the provision of advice at *Sierra* as if the complexities of people's lives and issues are at the forefront of their changes, the organisation can have a positive impact on an individual's lived experience. If this emphasis remains on funder expectations then the organisation can potentially suffer from mission drift and ultimately change the provision of advice. Furthermore, it is argued that it is an organisation's reaction to change that can influence the provision of a service, in this case, advice (Chapman, 2017). A significant consequence is associated with becoming increasingly entrepreneurial in attracting funding for a voluntary organisation. This can create a shift from an organisation's mission, the staff and volunteers that provide these services may, therefore, become uncomfortable providing the services the organisation is now involved in (Chapman, 2017; McDermont, 2017). These findings support the conclusions for *Federal* organisations presented here, it is clear that the changes that are associated with external funders at the organisation are having a significant impact on the provision of advice and the success and sustainability of such services.

Local voluntary advice organisations view change and advice differently to *Federal* organisations. *Acadia*, a *Local Providing* organisation, has a number of specialist projects that are externally funded and consequently have a number of requirements attached to them in order to guarantee their funding. *Acadia* increasingly places emphasis on the needs of the community, particularly since their transition from *Federal* organisation to *Local*. Therefore, they do not tailor their advice on funded projects to the needs of the funder, instead only continue a project if it is beneficial to the local community as opposed to gaining the most amount of funding for the organisation possible. Therefore, they protect many of their advice provisions from change due to their ability and freedom to select the funding partners that are utilised. Macmillan (2011) highlighted that in order for organisations, and perhaps the voluntary sector as a whole to 'survive', organisations need to have some level of adaptability. This notion can be best applied to *Acadia*, as they experience advice changes from both funders and from social policy reform. The organisation is able to take control of their own levels of adaptation as they have the

autonomy to maintain funders and projects that they deem most appropriate whilst continuing to recognise the wider picture of the voluntary sector, an ability that may be out of sight without the pressures of external funders.

Redwood operate on a different basis to both *Sierra* and *Acadia*; their emphasis is on finding a need that the local community has. As opposed to funding the organisation as a whole, they identify a gap in provision in the community and then continue to build advice and a programme for that need acquiring funding once the need has been highlighted. Advice at *Redwood*, whilst still susceptible to change, is less influenced by funder demands as the other two organisations as they have identified a funding partner that suits their needs. Advice for *Local Empowering* organisations is therefore affected more intensely by social policy reforms and the issues that the service users or local community are facing determines the advice provided at the organisation.

It is therefore clear that change can occur for the provision of voluntary advice, but this comes in different forms depending on organisational structure. For *Federal* organisations such as *Sierra*, it is internal, funder-based change that is most prevalent, whilst still coupled with social policy-based reforms. This is in complete contradiction to some literature, which suggests that the *Federal* structure of *Sierra* would be able to provide some level of protection against such changes (Civil Exchange, 2016). For *Acadia*, they have similar internal problems with funder expectations as they are involved in more structured, specialised projects. However, their *Local* structure allows them more freedom to choose the funder that best suits the organisation's mission and needs of the service users which therefore limits the changes to the provision of advice. *Redwood*, whilst they still experience changes to their advice provisions, these changes do not necessarily come from funders but are more likely to be driven by social policy reforms and the needs of service users. This highlights that structural differences in voluntary advice organisations can, in fact, have a significant influence on the provision and consistency of advice. This thesis therefore provides understanding of these structural differences between voluntary advice organisations and how organisations such as the ones included in this research can navigate current and future social policy changes.

7.2 Community

This thesis argues that the relationship a voluntary advice organisation has to the local community can influence the provision of advice, with advice services being tailored to the needs of the community at *Local* organisations as opposed to the needs of the national body or funders at a *Federal* organisation. This thesis utilises Delanty's (2003) definition of community referring to the collection of small groups, such as neighbourhoods. For voluntary advice organisations the community they refer to in conversation often denotes the local area surrounding the organisation, from which many of the services users and also volunteers derive. It is therefore why the organisations in this research particularly are concerned with developing their local community, as it will benefit many individuals that both use and provide the services of the organisation.

The notion of community is important to all three organisations, however, their relationship with the community and the implications this has for advice does differ. Community-based advice projects at *Sierra*, a *Federal* organisation are less tailored to community needs than at both *Acadia* and *Redwood*. *Acadia*, a recently transitioned, *Local Providing* organisation is able to choose more freely the projects and programmes it now offers to the community, these are beginning to be more community focussed since their transition from a *Federal* organisation. *Redwood* is a *Local Empowering* organisation and therefore works *with* individuals in need as opposed to providing services *for* them. This allows the organisation to be at the forefront of community action and development, fully understanding the needs of the community.

7.2.1 Specialist Projects

Community development and assisting service users in the issues that they face is a key value of voluntary advice organisations, regardless of their structure. It was found in all three case study sites that there was some level of community recognition in programme development. The advice organisations involved in this research each develop their advice programmes with the needs and demands of the local communities in mind. The ability to operate with such autonomy has been

a key concern for the voluntary sector and its supporters, including the state for many years (Buckingham, 2011). The voluntary sector, unlike the public and private sectors that often have to deal with a mass audience for the benefit of market values and profits, has the ability to develop their services in the interest of their service users at their core (Buckingham, 2011). However, a blurring of lines is occurring between the three sectors, and therefore voluntary advice organisations are becoming more entrepreneurial, rather than community focussed, a theme that is found to be occurring more so at *Sierra* due to its *Federal* structure than at *Acadia* and *Redwood* that are both *Local* organisations with a greater degree of autonomy away from the restrictions of a national body (Buckingham, 2011; Kirwan, 2017a).

The *Federal* model that is used to describe *Sierra* highlights that the organisation has some autonomy to develop community-based programmes (Knight, 1993). However, the findings of this research show that although the organisation does have a degree of autonomy for this development, this is limited and funding dependent. The programmes offered at *Sierra* are often made up of programmes delivered by the national body, in contrast to the findings proposed by academic literature (Knight, 1993; Civil Exchange, 2016). This provision supports the organisation and brings service users into the organisation who were seeking the specific projects of the national body *Sierra* is affiliated with.

Acadia on the other hand, with their *Local* structure, have begun to build and develop their specialised programmes depending on the needs of the Liverpool city centre community. *Acadia* has, therefore, shifted their view to recognise the need in the local area, working alongside service users to develop programmes that best suit them. This is the root of programmes at the organisation, coupled with the search for funding. This is in contrast to the research proposed by Buckingham (2011) as it is stated that although there is a growing pressure on voluntary organisations to fill the gaps of provision that can no longer be provided by the government, especially in terms of welfare benefits, autonomy for voluntary organisations may be decreasing due to the growing culture of hybridity. *Acadia* does remain dependent on specific funders and partners for projects, unlike the less stringent style of projects adopted by *Redwood*. This can

have an impact on the programmes that are offered, however, it is within the best interests of the organisation to concentrate on the needs of the community and develop programmes for that as opposed to developing programmes for the benefit of the funder that may be underutilised by service users.

Redwood has a different system for developing programmes to both *Sierra* and *Acadia*. Programmes are solely built for community need and development. This not only meets the needs of a highly deprived community that rely upon the services of *Redwood*, but it also benefits the organisation as a whole. With the current occurrence of increased closures of voluntary advice organisations in the area (Organ and Sigafos, 2017), developing programmes in this unique manner allows *Redwood* to avoid the duplication of programmes at remaining organisations and for service users. Therefore, *Redwood* utilise their local community to fully understand the services they require from the organisation, as opposed to chasing funding partners and developing a programme that may go unused and be costly in terms of resources, volunteer and employee time. Similar to the findings in this study, it was found by Pope et al. (2015) that similar sized voluntary organisations to *Redwood* are less likely to take entrepreneurial steps to outsource activities or in this case alter programmes to meet business needs as this would ultimately run the cost of business up.

Further to this, the welfare reforms that have been rolled out across the UK since 2010 have disproportionately affected the Liverpool area, which is in the top ten for losses per working-age adult. There are increased levels of need within the local community, due to welfare reforms and other markers of deprivation (Beatty and Fothergill, 2014; Department for Communities and Local Government, 2015). Therefore, *Redwood* strives to meet these needs in order to develop the well-being of the community in the face of fast-paced social policy reform, heightening their levels of sustainability, respect and position within the community.

This thesis argues that the ability to recognise the needs of the community for advice programmes can impact sustainability. *Federal* organisations do have some autonomy in developing

programmes that are tailored to their local community. Upon conducting research with *Sierra*, it was found that specialist programmes are largely funded through the national body. At *Sierra*, few programmes remain that are based on the needs of the community directly, a notion that is in contrast to the literature provided in this area. *Acadia* has begun to develop a growing number of community-based programmes since transitioning from a *Federal* organisation to a *Local* one. This allows them to build sustainable programmes that not only meet the needs of the service users in the local area but address key issues in social policy and are utilised by many in the area. Furthermore, *Redwood* use the community to develop all of their programmes, in contrast to the work carried out by *Sierra* and *Acadia*. This allows them to develop their local community, providing a much-needed service to service users who they recognise as being in need of their service. Therefore, *Local* organisations particularly of an *empowering* action, as these results demonstrate, have a greater level of autonomy to deliver programmes and provisions of advice for the local community. The ability to meet the needs of service users allows these *Local* organisations to improve the sustainability of these provisions and the wider organisation as they are providing services that the local community are in need of and therefore take up, as opposed to the *Federal* organisation that can lock service users out of advice programmes due to the restrictive criteria laid out by funders and the national body

7.2.2 Relationships between the Organisation and the Community

Multiple relationships exist within voluntary advice organisations, between the hierarchies of employees and volunteers and service users, and the organisation as a whole to the local community. The levels of these relationships do vary between organisational structure due to the differing levels of anonymity and hierarchical structure that has been demonstrated at each organisation in this thesis. Similar findings to these overviews have been identified in other voluntary sector research. Jones et al., (2016) studied the voluntary sectors in both Liverpool and Bristol and found that at an organisational level, the elongated period of austerity in the United

Kingdom has brought the voluntary sector and local authorities together to promote the sharing of resources to meet local community need through a strengthened relationship. On an individual level, relationships can be more closely connected to the theory of social capital, primarily rooted in the work of Bourdieu (1984; 1997), but also related to the voluntary and community sectors through Putnam (1993; 2000) and users of their works and theories (Miles, 2012; McGovern, 2014; Hayton, 2016). Social capital is an interaction within the community and involvement in social action, this leads to an increase in trust and interaction between individuals who all interact on an equal footing (Pattie and Johnston, 2011). Further to this, it is argued that as a result of social capital, a community identity can exist for individuals involved in voluntary action, certain areas are more ‘community-bound’ than others, for instance, suburban areas over city centres (Miles, 2012: 17). These arguments of social capital and community can be applied to this research as findings revealed the differing levels of relationships between the case study sites and the significant differences in how each of them was ‘community-bound’.

Both the *Sierra* and *Acadia* organisations demonstrated the close relationships volunteers and employees built with service users, despite their differences in structure. A difference between the two case study sites and *Redwood* was *Sierra* and *Acadia*’s openness surrounding the stigma that their service users were experiencing and the extent the organisations go to in order to aid service users in overcoming or escaping such stigma. This was a finding that emerged from the data following the thematic analysis that was undertaken. The conversations at both *Sierra* and *Acadia* uncovered an awareness of stigma, however due to the inductive emergence of this theme, conclusions are solely represented from the volunteers’ viewpoint as opposed to the view of the whole organisation or the service users who are experiencing these stigmatised issues and situations. *Sierra* identified stigma as a significant contributor to the complex issues that service users are dealing with as individuals are discouraged through the convoluted application and claims process related to welfare benefits. Similarly, at *Acadia*, it was suggested that stigma can lead to some of the most complex issues that are dealt with by the organisation. Interviewees revealed that service users tend to be less trusting of advisers in the first instance, particularly if

they are stigmatised and therefore advisers must be able to successfully build trusting relationships with individuals early on in the advice journey.

The relationship between stigma and benefits has been recognised in the wider literature, particularly by Baumberg et al. (2012) and Patrick (2017a). The notion of institutional stigma (Baumberg et al., 2012) or claims stigma (Patrick, 2017a) described as the claiming process for benefits being dehumanising and alienating. Individuals keen to escape from benefits and the stigma attached to the process of applying and claiming for benefits (Patrick, 2017b). Whilst escapism is not applicable to all, those who are able to are known to be anxious to find work and stop the reliance on benefits in order to ‘stop feeling like a ‘scrounger’’ (Patrick, 2017b: 300). Even though paid work may be found, the escapism of stigma cannot be promised, particularly given the uncertain circumstances of the current labour market and availability of zero-hour contracts. This thesis furthers the current stigma narrative provided by Baumberg et al. (2012) and Patrick (2017a; 2017b) as both *Sierra* and *Acadia* demonstrated the ability of voluntary advice organisations to guide service users through the claims process and ultimately out of benefits stigma through their close relationships within the organisation. Whilst these contributions provide new insight into the role of voluntary advice organisations in combatting stigma, the discussion is limited to a singular viewpoint of the volunteer and how they interpret their relationship with the service user. This discussion would further elaborate on the work of Baumberg et al. (2012) and Patrick (2017a) if an investigation was carried out into the experiences of service users, how they are stigmatised and the role of the voluntary advice organisation in overcoming this. Due to the methodological process of the thesis, such an exploration has not been conducted and thus further conclusions regarding stigma and voluntary advice cannot be speculated (further elaborated in section 8.4).

The relationship between adviser and service user is also important to consider outside of the stigma rhetoric. At voluntary advice organisations, the relationship between volunteers and service users was important, but that it can change depending on the cohort of volunteers, the complexity of issues and the evolution of advice. Digital advice was discussed at all three

organisations and was described as a complex procedure for both service users and advisers. This is supported by Rochester et al. (2010) as they suggest that the digitisation of society is creating a change in the interactions and relationships between people and that relationships developed face-to-face will be challenged. Similarly, the effectiveness of non-face-to-face advice is questionable given the complexity of a service user's situation and issue, for many online or telephone advice is not applicable or accessible (Buck et al., 2010; Balmer et al., 2012; Harris, 2017). At *Redwood*, digital advice was less prevalent given the nature of advice-giving on projects, although complexities of digitisation can be shared with the other case study sites.

With *Redwood* and *Sierra* being the two most conveniently located organisations to a local community in the study respectively, it could be suggested that relationship building at *Acadia* could be troublesome given their anonymous city centre location. It is elucidated that given the lack of community that exists in city centres, voluntary action is more likely in areas that are convenient to individuals, such as the tightly-knit communities of *Sierra* and *Redwood* (Rochester et al., 2010). Furthermore, operating as a local individual in a voluntary organisation is a more effective means of establishing relationships between volunteers and the community that they serve (Pattie and Johnston, 2011). However, findings at *Acadia* demonstrate that they are able to build relationships as strong as the other case study organisations, despite their lack of traditional community. It is argued that this could be due to their transition from *Federal* to *Local* organisation, a movement that did not occur at the remaining case study organisations but has built a significant level of trust and support between *Acadia* and the Liverpool City Centre community. Therefore, this thesis argues that *Local* voluntary advice organisations in areas of high deprivation, such as post-industrial towns and cities including Liverpool can build successful relationships with service users as they support those through the disproportionate changes that have been introduced during the era of austerity and recent social policy reforms.

7.2.3 Deprivation and How It Is Experienced

Voluntary advice organisations can have different perspectives of deprivation due to their structure, as both *Federal* and *Local* organisations differ in terms of the programmes they offer and the relationships they form with their local communities. Out of the three case study sites involved in this thesis, *Sierra* is the organisation that offers the least concentration on the community. This is due to their *Federal* structure as they are constricted in their freedom and adaptability to meet the needs of the local community. Furthermore, the volunteers that operate at *Sierra* largely derive from outside of the community and thus are less invested in community development than the other organisations in the study. This gives rise to both Pattie and Johnston's (2011) and Lindsey's (2013) arguments that being a local volunteer creates a more effective means for building relationships and deprived communities such as *Sierra* are less likely to be welcoming of input from outsiders. *Acadia* has more concentration on community development than *Sierra*, again this is following their recent transition to a *Local Providing* organisation and so they inevitably have greater freedom to design and control the programmes that they offer to recognise and alleviate deprivation and aid development of the local area. This is in opposition to research presented by Mohan (2012) that states there are fewer voluntary opportunities and resources in disadvantaged areas. This thesis demonstrates that voluntary advice organisations build the skills of their service users through both self-help and inclusive advice-giving, creating a positive result for the local community in resolving and avoiding future issues.

This research states that a *Local Empowering* organisation has the greatest availability to work with the community to relieve the pressures of deprivation. *Redwood*, unlike *Sierra* and *Acadia*, develops its projects for the sole purpose of community development. They, therefore, recognise the deprivation in the local community and work to reduce the negative experiences of this deprivation through their inclusive programmes, such as the computer 'hub' that is accessible for the whole of the community. The local area was recognised by the organisation to have a

significantly low level of computer ownership and accessibility that can lead to greater deprivation as benefits and employment cannot be applied for online, as is the case for most individuals (Harris, 2017). This digitisation is creating greater levels of deprivation in the local area according to *Redwood* and therefore the ‘hub’, as well as other projects, involve increasing computer literacy to develop the community and move away from deprivation. Overall, voluntary advice organisations demonstrate the ability to alleviate deprivation and the issues related to this through their advisory service.

The notion of community is prevalent for all three case study sites. It is *Redwood* that has the most significant level of autonomy due to their *Local* structure, which allows them to develop programmes for the benefit of the community. Relationships between each organisation and the local community are crucial for organisational longevity. It is *Acadia* that demonstrate the most surprising findings as their anonymous location in the city centre has allowed them to build and nurture a relationship with their local area, which is uncommon in city centre locations (Rochester et al., 2010). Community development is important to all three case study sites, but for different reasons. For *Sierra* and *Acadia*, they emphasised the recognition and alleviation of stigma through advice work in the local community as this could also go some way is lessening the effects of poverty that the organisations witnessed. For *Redwood* they sought to provide resources and skills to address the lack of digitisation in the local area. These concentrations for each of the three organisations demonstrate their relationships with the local community and this thesis highlights how organisational structure can influence relationship building for voluntary advice organisations.

7.3 The Drivers of Change

The drivers of change that were identified by Kellock Hay et al. (2001) and Cameron and Green (2015) as political forces, funding and the evolving architecture of the voluntary sector, do exist for voluntary advice organisations. Change, however, has varying effects and manifests itself differently at *Sierra*, *Acadia* and *Redwood* due to each of their structural make-up. Each

organisation identified that political forces or social policy reforms are creating more complex issues for service users as they struggle to navigate re-testing and applications for benefits (as described in section 7.2.2). Volunteers take the brunt of these as they are at the ‘front-line’ of advice giving, but are showing resilience and strength in their roles during the fast-paced policy environment. Whilst current volunteers cope well with change, the organisations discussed that recruitment of new volunteers is challenging as the social policy reforms that are affecting service users are also putting pressure on potential volunteers to seek paid work over voluntary roles. Internal changes are often funding related, at *Sierra*, volunteers demonstrated the most struggle to keep abreast of policy changes. The organisation offers continuous training for volunteers but also adapts their advice-giving to the meet the needs of funders, creating significant complexity in change. *Acadia* and *Redwood*, whilst not without struggles displayed positive changes and growth as they use advice to shape and develop their local communities. This thesis argues that these drivers of change are creating complex caseloads and voluntary roles within voluntary advice organisations and offers understanding on how these organisations can perceive changes in the future.

7.3.1 Political Forces: Social Policy Changes Post-2012

This thesis demonstrates the significant impact of social policy reform on voluntary advice organisations, with one of the major repercussions being the increasing complexity that is associated with social policy reform, particularly following the Welfare Reform Act 2012. The purpose of the Welfare Reform Act 2012 was to simplify the benefits system, leading to the promotion of employment and the reduction in spending on the benefits system (Makowiecki, 2015). Whilst concentration was on simplification, Kirwan (2017) found that cases taken to voluntary advice organisations are actually becoming more complex as a result of social policy reform, particularly regarding Universal Credit and the ‘Bedroom Tax’. Universal Credit signals a fundamental change for the welfare system, with new requirements and sanctions being introduced and critics warning that these could be experienced negatively by claimants (Dwyer

and Wright, 2014). The sanctions system that is coupled with Universal Credit and other policies from the Welfare Reform Act 2012 have been argued to be a system of punishments that are pushing people out of the benefits systems as opposed to involving them in it (Reeve, 2017). Whilst these findings demonstrate the complexity of the Welfare Reform Act 2012 and the policies that followed, they do not concentrate on the complexities of such policies for voluntary advice organisations that deal with the individuals who are navigating these changes. Such arguments are highlighted by Kirwan (2017a) and Organ and Sigafos (2017), although their work concentrated on the work of Citizens Advice whereas this thesis has and will continue to demonstrate the similarities and differences between the experiences of social policy reforms between different organisational structures.

Sierra and *Acadia* both stated that in recent years they had witnessed a growing complexity of cases and issues, with service users often bringing multiple issues to the organisation at one time. This demonstrates that not only are service users dealing with an abundance of problems relating to social policy changes, but volunteers also have to be prepared to disentangle these multitudes of problems, prioritise them and guide the service user through dealing with them accordingly. This is a time-consuming procedure, and for *Sierra* that is also competing with funder targets and requirements, the volunteer role must also take these into account. These complex problems have been recognised, as it is suggested that a complex security system, such as the one introduced following the Welfare Reform Act 2012 can include problems such as a lack of understanding from claimants, low take-up of benefits, high administrative costs and risk of errors (Machin, 2017). These problems are especially prevalent for Universal Credit, a key policy that was highlighted throughout interviews at each of the case study sites. It is stated that as Universal Credit is an overhaul of the existing benefits structure, it would inevitably run into difficulties, particularly given the increased level of digitisation involved (Millar and Bennett, 2017; Larkin, 2018). These problems were arguably due to the concentration of Universal Credit as a policy as opposed to a system that heavily involves people, an argument the findings of this research being that ‘Universal Credit fails to connect with the realities of life’ (Millar and Bennett, 2017: 178).

Redwood, whilst still dealing with an increasing amount of complexity in the issues that they dealt with argued that this goes hand in hand with the deprivation and vulnerability that they experience on a regular basis at the organisation. The move from DLA to PIP was a shared concern amongst interviewees at *Redwood* with service users no longer being eligible for the disability benefit and thus utilising the services of the advisory organisation to deal with the issues surrounding this. It was estimated that 28 percent of DLA claimants would not be eligible for PIP during the re-application process (Organ and Sigafos, 2017). *Redwood* recognise this and have focussed projects to deal with the increasing number of individuals who would fall into this percentage, for instance increasing capacity on the men's health programme to promote general physical and mental health as well as a keen focus on disability procedures through the veteran's programme where many service users are claimants of disability benefits. It is therefore clear that the effects of social policy reform are far reaching. Volunteers especially deal with more complex issues, but the way in which voluntary advice organisations experience and react to these changes differs depending on organisational structure.

7.3.2 The Evolving Architecture of the Voluntary Sector

The evolving architecture of the voluntary sector refers to the ever-changing roles of organisations and understanding of what it means to be a voluntary organisation in society today. Kellock Hay et al. (2001) state that this is one of the key drivers of change for voluntary organisations and this thesis argues that this final driver can be extremely significant for voluntary organisations as it can influence and also encourage both the political forces and funding drivers.

The evolving architecture of the voluntary sector is a phenomenon that is occurring during a time of fast-paced policy change and uncertainty, with organisations restructuring, realigning services and changing the make-up of their workforce (Kellock Hay et al., 2001; Alcock, 2010a; Alcock et al., 2012; Cameron and Green, 2015; Aiken and Harris, 2017). This evolution can be closely associated with the movements in recruitment and retention that were expressed at all three case study sites. Organisational change has been at the forefront of many recent studies (see, for

example: McDermont, 2013; Ellis Paine, 2015; Macmillan, 2015; Aiken and Harris, 2017; Kirwan, 2017a; McDermont, 2017). In McDermont's (2017) study on the *Federal* organisation Citizens Advice during the period of austerity, it was found that the sensitive issues dealt with at the organisation such as the demand for foodbank vouchers can leave volunteers feeling helpless if the organisation does not have the means to provide such measures. Therefore, organisations must be ready to work in networks with other organisations to provide advice or assistance on challenging issues and it will be these actions that act as 'motivation for advisers to keep going' (McDermont, 2017: 39). Whilst changes to an organisation can be a challenge for volunteers, it is argued that the Citizens Advice has become an 'iconic British institution' and there is a commitment from volunteers to the organisation (McDermont, 2017: 39). As a *Federal* organisation, this notion can be applied to *Sierra*, with some volunteers stating that they had been volunteering at the organisation for in excess of 15 years. However, in general, the organisation had low retention rates of volunteers, a significant concern of management that was arguably due to the complex role that volunteers now have to take on due to the other drivers of change; funding and political forces. As issues that are presented to the organisation are becoming more complex, advisers are less likely to remain in their volunteering post due to the uncomfortable and sometimes disappointing lines of advice they have to deliver to service users (McDermont, 2017). This finding is particularly important to consider for both *Sierra* and *Acadia* that stressed the difficulties volunteers face on a daily basis and that the volunteer adviser role is not an easy one to carry out. This was less the case at *Redwood* whose ability to offer advice with deep involvement on a project as opposed to a traditional interview-style method can alleviate some of these difficulties and ultimately aid volunteer retention.

In general, *Acadia* had long-term retention of volunteers, similarly to *Redwood*, but unlike either of the other two organisations, their city centre location had yielded a growing cohort of student volunteers. This created a separation of the volunteer team with long-term volunteers and short-term students both operating together at certain times of the year, the volunteer base, therefore, has peaks and troughs. This relates to Anderson and Green's (2012) argument that student

volunteers take part in short-term volunteering, this was particularly prevalent at *Acadia* as it was stated that many students leave their roles during the summer months to travel away from their term-time residences. It is stated in wider studies that a student volunteer population can bring about a knowledge exchange, with beneficial outcomes for both students and volunteers (Anderson and Green, 2012). This can lead to an increased social capital for the surrounding areas of a voluntary organisation, however, this is more likely to occur where students are likely to derive from the local area and remain there after they complete their course, an unlikely occurrence for *Acadia*.

All organisations placed emphasis on providing skills for volunteers, for *Sierra* this was to aid with changes, for *Redwood* it was to help individuals enter the labour market, at *Acadia* the main reason for this was to improve volunteer retention. The organisation strives to ensure its volunteers are involved in organisational development and changes that are occurring at the organisation. Volunteers are therefore fully engaged in the provision of advice and well-being of the organisation, this corresponds to studies carried out in the United States that states engaged volunteers are the most likely to remain at a voluntary organisation, a possible explanation for the long-term retention of volunteers at *Acadia* (Harp et al., 2017). Ellis Paine (2016) states that an organisation's ability to provide current volunteers with skills in this way can lead to the recruitment of high quality, motivated volunteers in the future, *Acadia* can, therefore, be argued to be consistently concentrating on organisational development.

This thesis therefore contributes to the extant knowledge base as it highlights the differing experiences for hierarchies within voluntary advice organisations, with volunteers at the 'front-line' of advice giving and closest to the issues of the service user. The knowledge of these experiences can further the understanding of the provision of voluntary advice and the role of voluntary advice organisations in a sector that continues to evolve. For voluntary advice organisations operating in the current precarious environment, this thesis can help to inform organisations that provide such services of how these experiences can influence the process of advice-giving and the advisers that deliver it.

7.3.3 Funding Pressures & Other Internal Changes

Both *Federal* and *Local* organisations face funding and internal changes as a result of the current policy and economic climate. This is arguably because funding is both an enabler and a restrictor, it allows organisations to provide services and extend projects, but can also dictate where, what, how and to whom advice is provided by volunteers (McDermont, 2017). In general, voluntary organisations are found to be extremely resilient in the face of change, however, these funding concerns can be a significant issue for different structured and governed organisations (Aiken and Harris, 2017; Chapman, 2017). For *Sierra*, the dictating of funding has a significant impact on the role of the volunteer, with many volunteers are struggling to keep abreast of complex changes, from service user issues, social policy changes and shifting funding directions. It is the concentration on these issues that are largely outside of the organisation's control, especially in terms of funding, can create significant internal problems as an organisation's mission and values can be overlooked (Chapman, 2017).

Whilst changes were revealed to be challenging for *Sierra*, *Acadia* and *Redwood* have experienced positive internal changes. For *Acadia*, this was largely due to the transition from *Federal* to *Local* organisation in which they experienced positive organisational development as the organisation managed to maintain their mission throughout the transition. Chapman (2017) argues that these experiences are representative of a strong organisation that has the ability to adapt to their environment as they have the foresight for the organisation, as opposed to a concentration solely on funding. Similarly to both *Acadia* and the arguments of Chapman (2017), *Redwood* has experienced positive internal changes with a growth in projects. This is both because of the securing of new funding that allows for the promotion of new projects (Kellock Hay et al., 2001), but most importantly because of their ability to connect to their local community and observe the organisation's position within it current and opportunities for the future. *Redwood*, unlike *Sierra*, have navigated their organisational development away from a hierarchical bureaucracy that can be led by private market mechanisms, maintaining a level of

anonymity as a *Local Empowering* organisation, demonstrating that isomorphic influences are not always paramount to all organisations within an organisational field as suggested by DiMaggio and Powell (1983). It is argued that groups of organisations located in the same organisational fields become increasingly similar as a result of powerful forces and institutional environments, known as isomorphism (Meyer and Rowan, 1977; DiMaggio and Powell, 1983).

This thesis argues that change, in the multiple forms that affect and influence voluntary advice organisations such as social policy reform, community pressures and funding, differs for organisations depending on their organisational structure. Therefore, the organisations that this thesis concentrates on would be characterised in an organisational field according to DiMaggio and Powell (1983) as they provide similar advisory services based on the decisions of government and emergence of social policy reforms. It would be expected that they would have been affected by coercive isomorphism with organisational change occurring as a result of the pressures exerted by the decisions of government and other organisations in the field.

The focus on successful organisations as a result of isomorphism can be challenged following the findings of this thesis, particularly given the dynamic balances of power and management at each organisation. Meyer and Rowan (1977) argue that institutional isomorphism promotes both success and survival for organisations. DiMaggio and Powell (1983) updated this claim, suggesting that an organisation with differential goals to others in the field is more likely to model itself on another organisation that it perceives to be successful (1983: 155). However, the findings of this thesis show that the three organisations maintained a distinctiveness from each other. *Local* organisations were focussed on the needs of the community with *Federal* organisations being concentrated on the needs of the national body, despite sharing an organisational field.

This can be further examined by exploring how an organisation drives this change and therefore which actors are at the helm of such decisions. DiMaggio and Powell (1983) through the theory of isomorphism would argue that outside forces such as government decisions of organisations drive the changes which create homogeneity between organisations. Whilst *Federal* and *Local*

organisations are influenced by government decisions, for instance the emergence of social policy reforms, the structure and therefore decision-making abilities of each of the case study sites remain different. This is supported by Harrow (2011), in research on philanthropic foundations found that the 'iron cage' of isomorphism that promoted similarity may actually aid distinctiveness as organisations can use mimetic processes to become well known in their field and then promote their own nuances.

Whilst there are similarities between *Federal* and *Local* organisations and therefore each case study site in this thesis, it can be argued that a full isomorphic transformation does not exist for these organisations as differences in structure, provision and mission remain. *Sierra* have little autonomy as a branch over the changes that can be implemented and therefore are not able to mirror or be coerced by others in their field based on the services offered and proximity to other organisations. This is due to the decision-making abilities of the organisation. Decisions are largely handled at a head office and 'trickles down' to branches such as *Sierra*, providing managers or internal decision makers very little room for manoeuvre. It is the *Local* organisations that provide the strongest case for a lack of isomorphism at voluntary advice organisations. At these *Local* organisations, decision making is conducted by the organisation largely falling into the hands of management and the boards of trustees, although this can differ depending on the organisation's structure. *Redwood* are inclusive of volunteer and employee opinions and experiences in shaping the future of the organisation. *Acadia* are moving towards this but a tight hierarchy remains following their transition from *Federal* to *Local* organisation. Changes that are implemented can still derive from external forces for *Local* organisations, for instance government related social policy reforms however the reaction of the organisation is controlled by the organisation themselves.

It is evident from the findings of this thesis that significant differences remain between structures of voluntary advice organisations and therefore a process of complete isomorphism has not occurred in this organisational field. Such conclusions are supported by Ramanath's (2009) study of voluntary organisations in Mumbai. It is argued that instances of diversity exist for voluntary

organisations; this is due to two primary indicators. Firstly, the ‘path-dependent factors’ of the organisation such as a commitment to their founding values which is carried out through their day-to-day activities. Secondly, an organisation’s ‘resource environment’ such as finding sufficient and timely funds for the delivery of programmes, projects or in this case advice; both of which exist for both *Federal* and *Local* organisations.

The drivers of change, political forces, the evolving architecture of the voluntary sector and funding pressures (Kellock Hay et al., 2001; Cameron and Green, 2015), are increasingly the levels of complexity for cases and issues at all three case study sites. This phenomenon is closely witnessed in peaks and troughs at *Sierra* and *Acadia* due to their provision of advice in the face-to-face interview style. *Redwood*, on the other hand, move their programmes in line with the needs of service users, which can also track the movements of social policy reforms and therefore findings suggest more consistent changes at the organisation. The evolving architecture of the voluntary sector affects all of the case study sites, regardless of their organisational structure. All three organisations involved in this research struggle with recruitment of new volunteers and thus witness the importance of building the skills of their current employees and volunteers to ensure retention and the continuation of services. Funding pressures are affecting the voluntary sector as a whole (Dayson, 2011; Aiken and Harris, 2017; Chapman, 2017; McDermont, 2017), this thesis has presented that it is *Sierra*, with their *Federal* structure that are suffering from mission drift most rapidly due to their lack of autonomy to meet the needs of their service users. This thesis therefore argues that the drivers of change identified by Kellock Hay et al. (2001) and Cameron and Green (2015) exist for voluntary advice organisations and it is their organisational structure that determines the severity of these changes.

7.4 Summary

This chapter has analysed the similarities and differences between structures of voluntary advice organisations on three main themes that emerged from the research; *advice*, *community* and *the drivers of change*. It has been elucidated that advice differs between all three voluntary advice

organisations involved and this advice can also be altered depending on organisational structure. *Sierra* alter advice provisions for the national body and funders, compared to *Redwood* that alters advice solely for need in the community relating to social policy reform. Similarly, the relationship each organisation has with the community is determined by organisational structure. The *Local Empowering* organisation *Redwood* has the most flexibility to overcome need and deprivation in the community and so displays the most significant relationship. Although this finding can be applied to *Local* organisations more broadly, as results demonstrated that since transitioning to a *Local* organisation *Acadia* has been able to build a relationship with their non-traditional community. Change is complex and multifaceted at all organisations; social policy reforms clearly affect all levels of the organisation and are experienced differently depending on organisational structure through the three drivers of change identified.

This chapter and thesis overall argue that organisational structure can influence the experience of social policy reform. For both *Federal* and *Local* organisations, the provision of advice is becoming more complex as a result of the three drivers of change identified. Political forces are creating multifaceted issues for service users and cases for advisers, funding is driving resources such as project-funding, employees and volunteers away from voluntary advice. Finally, the evolving architecture of the voluntary sector is shifting the role of voluntary organisations in society, creating greater pressure to deliver public and mainstream services. The differences in organisational structure determine the way in which organisations utilise these changes and experiences. *Local* organisations use complex change to meet the needs of service users through their autonomy to deliver a needed service. However, *Federal* organisations can lock some service users out of advice provision due to the restrictions of the national body and funders, whose systems and projects may not meet the needs of the local community.

This thesis also demonstrates that hierarchies at voluntary advice organisations also differ, with managers, employees and volunteers experiencing social policy reforms differently. Managers have an overview of the changes that are occurring both within society and with their organisation, however their concentration is primarily on funding, the evolving architecture of

the voluntary sector and the organisation's role within the community. Employees largely work on specialised projects, both within *Federal* and *Local* organisations, and so their focus is similarly on the continuation of funding for that project. However, they do have greater insight on the issues that service users are facing and the way in which their project is utilised by those in need. Volunteers, on the other hand, are at the 'front-line' of advice giving. Their role leads to individuals experiencing the issues of the service users and the increased complexity of caseloads first hand. In addition to this, volunteers are also navigating these changes, understanding them and then subsequently providing advice on them to service users. This complex pattern is often carried out by volunteers who advise in irregular patterns, and so their role gets more difficult as they have to keep-up with fast-paced change for the benefit of the service user. This thesis therefore helps further understanding of the roles within voluntary advice organisations, their importance in the voluntary sector and wider society, along with the services that they provide.

8 Conclusion

This thesis has analysed the experience of social policy reform for voluntary advice organisations. Through a multi-site case study, it has presented the similarities and differences in these experiences from different structured organisations; *Federal, Local Providing* and *Local Empowering*. Further investigating the different experiences of staff in each organisation, the challenges and opportunities for voluntary advice organisations and the role of the community in the provision of advice. It has argued that different structured organisations have distinct experiences of the social policy reforms introduced following the Welfare Reform Act 2012 due to their varying abilities to meet the needs of the local community. The thesis argues that the drivers of change identified by Kellock-Hay (2001) and Cameron and Green (2015); political forces, funding and the evolving architecture of the voluntary sector have created considerable effects for voluntary advice organisations and the provision of advice. This provides greater understanding of the provision of advice in the voluntary sector and how organisations can perceive changes to these provisions in the future.

The policies introduced by the Coalition and subsequent Conservative governments have a significant impact, in particular, Universal Credit, Personal Independence Payment and the 'Bedroom Tax'. These policies are creating complex cases for service users, voluntary advice organisations, and especially volunteers who are having to navigate these complex issues and keep abreast of fast-paced changes. These policy challenges are also coupled with target-driven and the tightening availability of funding as well as a general lack of resources for the voluntary sector during a period of increased demand.

8.1 Thesis Summary

The main question that this thesis investigated was the experience of social policy reform for different structures of voluntary advice organisations. This has been demonstrated throughout the seven chapters of this thesis and it can, therefore, be concluded that the three organisations

involved experience social policy reforms differently due to their ability to meet the needs of their local community, which furthers the understanding of the role of voluntary advice organisations in society. This thesis argues that the structural differences of *Federal* and *Local* organisations create different experiences of social policy reform for voluntary advice organisations as *Local* organisations have more autonomy to shift their advice provisions to the needs of the service user and navigate the changes in issues that are being dealt with in society. Whilst this can promote change for the organisation, it is experienced in a more positive way as the organisation is not restricted by the regulations of a wider national body and has more flexibility in terms of funding selection.

Upon exploring the concept of voluntary advice organisations and their relationship to social policy reform, *Chapter Two* provided a debate on the current challenges for voluntary advice organisations and highlighted the research gap for voluntary advice organisations as research is primarily based in the work of Citizens Advice (see, for example: Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a). The chapter also brought together debates on the drivers of change that are at the core of this thesis; political forces, funding and the evolving architecture of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015). The importance of social policy reforms in the current policy climate was also covered, especially Universal Credit, PIP and the ‘Bedroom Tax’ revealing how they are affecting the most deprived neighbourhoods in England and Wales, including the fieldwork site of this research, Liverpool. Discussions surrounding the current context of the voluntary sector and a recent history of how it got there were also held followed by an exploration into the literature of communities and local relationships in order to gain an understanding of how communities and deprivation can be linked to voluntary advice organisations, a significant gap in the knowledge. The chapter made space for further research on voluntary advice organisations and social policy reforms as it demonstrated a lack of research on voluntary advice organisations that were not of a *Federal* structure.

Chapter Three brought about the justification for the case study method, highlighting the importance of a multi-site case study to give a comparison between the three organisations involved given their different structures. Semi-structured interviews were adopted to allow conversation and reflection of experiences in an organic way, an element of the research that would not have been possible through ethnographic or survey research where a sample size such as the one used in this study would not have been applicable or the voices of the volunteers, employees and managers could have been lost.

Chapters Four, Five and Six covered the results gathered from *Sierra*, *Acadia* and *Redwood* respectively. It was found that *Sierra* is constrained by their *Federal* structure as they are limited in the freedom of projects they are able to provide by the national body and by funders and the targets that are coupled with the provision of advice. Despite arguments that suggest *Federal* organisations are protected by their structure in the light of change, this research argues that this is not the case. These organisational restrictions are constricting for organisational and community development, especially when considered alongside social policy reform, which ultimately affects the needs of the service user. The transition that *Acadia* has gone through has allowed them to become more flexible and meet the needs of the service users, increasing their ability to involve themselves in community development. As a city centre-based organisation, *Acadia* has the potential to lack community relations but this is not the case. The anonymity that the organisation can offer service users and its ability to build networks with other organisations has led to the building of their own community and aid service users through the struggles of social policy reform. *Redwood* offers advice informally and they place a great deal of emphasis on avoiding many funder related targets and issues. The organisation seeks funding to promote community development, whilst they experience the issues of social policy reform both as an organisation and through the service user, they navigate these issues differently through their use of programmes and careful selection of funding.

Chapter Seven covered the three main themes that emerged from the research; *advice*, *community* and *the drivers of change*. This thesis argues that change and the experience of social policy

reform are prevalent for each of the case study sites, however, the more autonomy an organisation has to navigate the policy changes, the better the outcome for the organisation but especially for volunteers who are at the ‘front-line’ of advice giving. Throughout the thesis, and this chapter especially, it is clear to see that varying structures of voluntary advice organisations, in this case, *Federal* and *Local*, experience social policy reforms in different manners. It is discussed throughout that all three organisations offer advice differently, with *Redwood* most clearly using these reforms to meet the needs of the local community. All organisations involved do have some level of relationship with their community, *Redwood* is completely community embedded and strive to empower the community, although a surprising finding came in the shape of *Acadia*’s transition and their ability to become involved in community development, despite their city centre location, demonstrating that community involvement is more prevalent for *Local* organisations.

8.2 Research Contributions

How do differently structured voluntary advice organisations experience the post-2012 social policy reforms?

Using the structures and differences between organisations identified by Knight (1993), this thesis argues that *Federal*, *Local Providing* and *Local Empowering* voluntary advice organisations experience social policy reform differently as a result of these varying structures. The conversations held at each organisation revealed that as a whole, the case study sites were experiencing the most effects from the introduction of Universal Credit, Personal Independence Payment and the ‘Bedroom Tax’. These issues affect the services users of the organisations and the local community most fiercely, and as a consequence volunteers, but also employees and managers revealed that these were the reforms highest on their agenda to advise on and navigate through. Social policy changes or political forces as identified as a driver of change by Kellock Hay et al. (2001) and Cameron and Green (2015) are also coupled with the other drivers; funding and the evolving architecture of the voluntary sector. Considered together these create intense

struggles for voluntary advice organisations. For *Sierra*, a *Federal* organisation, their experience of social policy reform and concentration henceforth was to adapt their provision of advice to meet the needs of funders. This was a concern for volunteers and the organisation as a whole as it locked service users out of receiving some forms of advice, such as those offered on specialist projects. *Acadia*, a *Local Providing* organisation given their recent transition to a *Local* organisation now have a greater ability to concentrate on service users, whilst also maintaining and meeting the needs of funders. This ensures that *Acadia* maintains the specialist projects that are in demand from service users but can navigate through change with an increased level of flexibility to meet the needs of service users and improve the experience of social policy reform for volunteers and employees. *Redwood*, a *Local Empowering* organisation moves in-line with social policy change, meeting the needs of the community that is experiencing reforms. The organisation and staff involved, therefore, have to keep abreast of fast-paced policy change, but unlike *Sierra*, the *Redwood* organisation only adapts the provision of advice if it meets the need of the community rather than the need of the funder, creating an altogether more positive experience of change.

The three organisations experience reforms in different ways, with the *Local* structures being able to recognise and adapt to these reforms with greater ease due to their increased level of autonomy. The Welfare Reform Act 2012 brought about a number of social policy reforms including Universal Credit, PIP and the ‘Bedroom Tax’ which have created a precarious climate for voluntary advice organisations. This thesis contributes to the extant knowledge base by demonstrating the differences in these experiences of recent social policy reform which can aid voluntary advice organisations and the advisers within them to understand and shape their perception of change in the future.

What is the perception of social policy reform and austerity measures of managers, employees and volunteers in voluntary advice organisations?

This thesis reveals that all interviewees, irrespective of their hierarchy in the organisation were aware of and their roles affected by social policy reform. In general, volunteers are most affected by social policy reform out of the hierarchy, as they are at the 'front-line' of advice giving and dealing with issues in the first instance from service users. The perceptions and experiences did differ both between and within organisations, with volunteers at *Redwood* suffering least due to their provision of advice on projects rather than the interview style of *Sierra* and *Acadia*. Across all case study sites, the focus of managers was on the foresight of social policy reforms and how these would impact on the organisation as a whole. The specific focus of each manager did differ between the organisation, arguably due to the different structures of the organisation, their mission and focus. At *Sierra*, the managerial focus was on the impact of changes for employees and volunteers, how they were going to navigate changes to meet funding targets and the needs of service users. At *Acadia*, the focus was on the impact of social policy reforms for service users, the changing demographics and issues that the organisation, primarily volunteers would deal with as a result of this. At *Redwood*, a focus on funding came through most strongly, however, this was purely revolving around the needs of the service user as the manager was aware that changing needs in the community may result in a need for changing funders. Employees were aware of the effects of social policy reforms for service users, however, given their limited contact with service users due to the projects offered at each organisation, their main priority in terms of social policy change and their experience was on their projects and the importance of funding to ensure that these continue.

Therefore, volunteers have the most significant and difficult experience of social policy change as they are aware of the challenges and changes occurring for service users whilst also following these changes in an often-irregular work pattern. This thesis helps begin to fill the gap in the knowledge of the hierarchies and the different roles that exist in the provision of voluntary advice. This exploration highlights the importance of employees in voluntary advice organisations as

they provide specialist knowledge on specific projects in both *Federal* and *Local* organisations. It is these specific roles that demonstrate the importance of volunteers in voluntary advice and their ability to build close relationships with service users to understand their needs which can ultimately lead to greater community and organisational development, particularly for *Local* organisations.

What are the challenges and opportunities for voluntary advice organisations in the current policy context?

This research demonstrates multiple challenges and opportunities for voluntary advice organisations, it is arguably the structures of organisation that can lead to different challenges and opportunities. The drivers of change; political forces, funding and the evolving architecture of the voluntary sector (Kellock Hay et al., 2001; Cameron and Green, 2015) are imperative in the consideration of this research question. Political forces, more specifically the social policy reforms of Universal Credit, Personal Independence Payment and the 'Bedroom Tax' bring together these three drivers of change for voluntary advice organisations. They generate complex and multifaceted issues for service users, increasing the complexity and demand for volunteers. This is coupled with the changing provisions of funding and resources for voluntary advice organisations, further challenging their operations and procedures on a daily basis. This thesis argues that it is the different ways in which an organisation is structured that can provide opportunities to overcome these challenges, for resilience and development. This is most clearly demonstrated through *Redwood*, as a *Local Empowering* organisation their focus is on the needs of the community, they have autonomy to shift projects to meet the current social policy issues in the local community. The organisation has ownership of their own buildings, whilst they are not fully self-sustainable, this provision allows them to identify funding to meet these needs. On the other hand, *Sierra* is constricted by the regulations of the *Federal* structure, unable to fulfil autonomous control over the projects and advice offered to individuals. As a result of this, the organisation has merged with another branch of the *Federal* structure and the provision of advice has subsequently been diminished in the local area.

The driver of change termed the evolving architecture of the voluntary sector connects these two former drivers. This thesis demonstrates that the evolving architecture can change what it means to be a voluntary advice organisation in the current climate, both influencing and encouraging increasing change in the current policy climate and it is how an organisation deal with this that determines their experience of change. Therefore, this thesis argues that the greater level of autonomy a voluntary advice organisation has over their provision of advice, the more resilient they will be to challenges in the current policy context, which provides an opportunity for voluntary advice organisations to identify and manage their experiences of these drivers of change.

To what extent does the local community impact on the provision of advice by voluntary advice organisations?

As a result of the three previous research questions, it is clear that voluntary advice organisations have different relationships with their local community, which has the ability to drive different results in terms of an organisation's provision of advice. *Sierra* is located in a deprived community and draws some volunteers and many of their service users from the local area. The organisation is aware of the needs, demands and opportunities for service users, particularly relating to the social policy reforms that this thesis has concentrated on but is restricted in the projects that can be offered to alleviate these issues due to their *Federal* structure. *Acadia*, based in the city centre lacks a traditional community. However, through their transition from *Federal* to *Local* organisation, they have built and maintained a community, recognising service user's specific requirements and issues as a result of social policy change. This community was built on the search for anonymity for advice by service users, *Acadia* recognised this and their anonymous location and provision of advice is a key driver in their community relationships. *Redwood* is community embedded, the organisation works for the greater good of the community and strives to meet their needs and provide advice for their issues opposed to organisational development. This community focus is taken through to their provision of advice with programmes only being offered if the need and demand are apparent in the local community. The level of relationship in

the local community can significantly influence the provision of advice at a voluntary advice organisation, especially if the opportunity to meet the needs of the service user is available and engaged. This can consequently influence the experience of social policy reform as *Local* organisations, especially the *empowering* organisation in this research can adapt to changes without withdrawing services from the community, leading to a more positive experience. Whereas the regulations of the *Federal* structure can create a more heightened negative experience with fewer available volunteers and more complex advice sessions. Recent social policy reform has disproportionately affected the poor, this thesis helps to understand the organisations that assist individuals direct and understand the changes and issues that are affecting them. This is particularly important given the increased pressure to deliver benefits, support and advice online. The research and findings presented in this thesis aid the building of understanding around the importance of voluntary advice organisations in communities and the relationships that are involved in the process of advice-giving.

8.3 Implications for Policy and Practice

This thesis has explored the growing precarity of the environment in which voluntary advice organisations exist. In particular, how this environment, social policy reforms and other factors such as funding can influence the experience of change at three case study sites in Liverpool. Voluntary advice organisations especially are dealing with a growing extent of uncertainty, with key resources such as funding being consistently reduced along with an increasing lack of available human capital to provide advice as personal situations promote the need for paid work and thus remove a growing number of individuals from the voluntary sector. These issues for voluntary advice organisations are also coupled with reforms that affect the service users that utilise advice services, creating a two-fold concern for volunteers and employee advisers, as demonstrated in Chapter 7. For instance, Organ and Sigafoos (2017) identified that the cuts to Legal Aid provision that emerged during the period of austerity following the global recession in 2008 have resulted in reductions in funding for advice agencies, with organisations now able to

offer fewer advice services under the Legal Aid funded umbrella. This is coupled with increased demand as individuals who were once eligible for Legal Aid are now being referred to voluntary advice services. This already complex environment is worsened for service users with the emergence of new social policy reforms such as Universal Credit. These reforms create complex issues for service users as they begin to navigate a new, arguably more complicated system than before and thus require the services of voluntary advice organisations (Kirwan, 2017a). With an increased complexity for service users comes an increased complexity for volunteers as they undergo a process of understanding the service user's needs and requirements for advice, developing a solution that fits each individual circumstance as many service users have multifaceted issues as a result of social policy reform and then translate this solution back to the service user who can use it to deal with their complex issue (McDermont, 2013; 2017). This thesis, coupled with the extant literature base demonstrates that growing uncertainty within society leads to voluntary advice organisations, particularly volunteer advisers, dealing with two-fold issues as resources are cut and changes implemented following the effects of austerity and social policy reform which also leads to a growing complexity of issues from service users.

It is important that policymakers are aware of the multifaceted implications of social policy reform for voluntary advice organisations that provide advisory services of many of the issues that emerge as a result of such reforms. Data presented in Chapter 7 demonstrates that change is often perceived by voluntary advice organisations as being fast-paced and implemented with little guidance or consideration for the process of providing advice based on social policy or welfare related issues. As a result of this volunteers, who often only provide one or two days of voluntary work per week, are unable to keep track of the fast-paced change that is occurring, which can affect the provision of advice as service users are required to receive advice from a number of members of staff as some provide specialised advice. This emergence of data suggests that there is a need for some elements of continuity for voluntary advice organisations from policymakers in order to allow all individuals that provide advice with the opportunity to understand the multifaceted changes that are being implemented throughout society.

Data presented throughout this thesis highlights that there is little guidance provided by policymakers for voluntary advice organisations that relates to the emergence of social policy reforms, the changes that these reforms will implement and how organisations can begin to advise on these changes for the local community. Data that emerged from the fieldwork and has been presented in each of the findings chapters (Chapters 4, 5 and 6) demonstrates that volunteer advisers often use a self-help method to understand and learn about updates to some of the most in-demand issues dealt with at each organisation such as Universal Credit and PIP. This is often carried out in the volunteer's own time or within an advice session for more specialised enquiries, both of which can lead to greater anxieties from both volunteers and service users regarding the changes that are being implemented as a result of social policy reform. It is therefore imperative that policymakers are aware of these issues and the ways in which voluntary advice organisations experience change in order to promote a more positive experience in the long run. It would be particularly relevant for policymakers to provide guidance for voluntary advice organisations that would smooth the transition between changes for organisations. This would also give advisers and the organisation as a whole a reference for how to deal with reforms and government changes, providing continuity between advice at differently structured organisations, communities and wider regions.

Data presented in this thesis can also be beneficial for wider voluntary advice organisations that were not involved in the case study fieldwork. This thesis has demonstrated that differently structured organisations do experience social policy reforms in a variety of ways, based on their level of autonomy and relationship with the local community. Those organisations, such as *Local* organisations, that have greater autonomy over the provision of advice and funding patterns are able to more easily meet the needs of service users and the local community. This can lead to an increase in the number of changes experienced as the community is being served with the advice they require, those involved in the organisation such as volunteer advisers have a more positive experience of change.

Voluntary advice organisations can use this research to recognise the effects of change and the experiences of social policy reform in their own organisations, alter their perception of such changes and subsequently offer support to advisers. This thesis demonstrates that open working environments, where volunteers and employees can share experiences, are beneficial in dealing with the fast-paced social policy reforms that have and continue to emerge following the Welfare Reform Act 2012. These experiences by both volunteers and employees can also be used by management teams to highlight new projects, change advice styles and manage change in a way that is equitable to all and will be reflected in the provision of advice offered to service users.

8.4 Limitations and Recommendations for Further Studies

Whilst this thesis has focussed deeply on three case study organisations; *Sierra*, *Acadia* and *Redwood*, it has begun to fill the current gap in voluntary advice knowledge. Findings have contributed to a move away from the operational findings of Citizens Advice (see, for example Abbott, 1998; 2007; Holgate et al., 2012; McDermont, 2013; Kirwan, 2017a) and towards an understanding of organisational experience for both *Federal* and *Local* voluntary advice organisations. The study of volunteering patterns and motivations was not a primary focus of this research, but emerged as critical in the understanding of experiences for volunteers and others within each organisation. Further research on this topic for voluntary advice organisations could expand the exploration into the role of being a volunteer at both *Federal* and *Local* organisations in greater detail. This would provide more widespread understanding of the importance of volunteer advisers. The research presented in this thesis may be further applicable to the understanding of volunteering patterns and behaviours (Musick and Wilson, 2008; Rochester et al., 2010; Ellis Paine, 2015) and change management (Kellock Hay et al., 2001; Cameron and Green, 2015) if further studies were carried out for voluntary advice organisations who are severely under-represented in wider voluntary sector discourse. This was not the main focus of this research and therefore greater detailed research surrounding volunteers, both present and past

and the boards of trustees could explore the full experience of the organisation, which would be necessary to determine the findings of this thesis on a larger scale.

This research solely concentrated on three voluntary advice organisations in Liverpool during a period of intense and fast-paced change, in which Universal Credit, Personal Independence Payment and the 'Bedroom Tax' were being experienced on the cusp of this research period. Whilst this provided an understanding of these structures of organisations that are not thoroughly discussed in the voluntary sector field, the study would benefit from future research in other post-industrial cities, as well as more affluent areas to provide more representative conclusions. The differences in experiences between *Federal* and *Local* organisations and the hierarchies within them has begun to fill a gap in the knowledge of voluntary advice. This has also contributed to a growing knowledge base of voluntary action in Liverpool, particularly during the era of austerity (Jones et al., 2016) and significant Legal Aid Reforms (Organ and Sigafos, 2017). However, studies that included a larger and more representative sample would continue to further expand this knowledge base and create additional understanding of experiences that may not have been applicable in the Liverpool fieldwork setting.

The changes the thesis concentrated solely on, Universal Credit, Personal Independence Payment and the 'Bedroom Tax' were driven by the interviewees and provided significant evidence of the experiences between different structures of voluntary advice organisation. However, findings emerged from the research that contribute to stigma research available (Baumberg et al., 2012; Loopstra et al., 2015; Garthwaite, 2016; Patrick, 2017a). The findings related to stigma emerged from the data collected at *Sierra* and *Acadia* and highlighted through the thematic analysis process. Therefore, investigation into the organisational view and experience of stigma, along with the experiences of service users and their relationship with the voluntary advice organisation was not carried out. These studies on stigma and advice would be able to further contribute to the current debate, carrying out empirical research with service users and the organisations they escape stigma through could provide insight into the ways in which stigma can be left behind. This further investigation will help to supplement the understanding of stigma and advice.

However, it was out of scope for the current fieldwork and the theoretical implications of this thesis. In order to fully understand and represent the experiences of stigma, a study that conducted empirical research with voluntary advice organisation service users that identify as being stigmatised would have been most beneficial. Greater studies into this would allow these stigmatised experiences to be captured first-hand, allowing service users to control their own narrative regarding their experiences on such a personal and complex issue. Therefore, this thesis did not establish the theoretical underpinnings and experiences of stigma further as it would not have been able to articulate the narrative of each stigmatised individual, instead it is limited to the passive voices of volunteers. The contribution of these volunteers' experiences in aiding the navigation out of stigma continues to update the current body of knowledge and wider research would be able to build on this framework of understanding in the future. Field theory would be particularly influential both here, and to the other areas identified in this section. This would illuminate the fields that are represented and navigated through the relationships and issues that have been addressed at the case study organisations and throughout this thesis. This exploration could further situate voluntary advice organisations in sociological theory and provide greater representation of organisations in England and Wales.

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10 Appendix

10.1 Appendix One

Participating Interviewees

Pseudonym	Role in Organisation	Organisation
Emma	Manager	Sierra
Julie	Employee	
Marie	Employee	
Jennifer	Employee	
Justin	Employee	
John	Volunteer	
Paul	Volunteer	
Jane	Volunteer	
Simon	Volunteer	
Barbara	Volunteer	
Lee	Volunteer	
Paula	Volunteer	
Martin	Volunteer	
Sheila	Volunteer	
Phillip	Volunteer	
Ken	Manager	Acadia
Peter	Employee	
Dawn	Employee	
Bonnie	Employee	
Joanna	Employee	
Rebecca	Volunteer	
Matthew	Volunteer	
Sam	Volunteer	
Hazel	Volunteer	
Piers	Volunteer	
Camilla	Volunteer	
Jack	Volunteer	
James	Volunteer	Redwood
Carl	Volunteer	
Emily	Volunteer	
William	Manager	
Adam	Employee	
Antony	Employee	
Geoff	Volunteer	
Keith	Volunteer	
Kevin	Volunteer	
Sid	Volunteer	
Alice	Volunteer	
Jeremy	Volunteer	

10.2 Appendix Two

Interview Schedule - Managers

Tell me about the services offered at the *Sierra/Acadia/Redwood*

- What is your role
- How long have you been here?
- Were you in employment before this?
- How do the advice services work?

Can you tell me about the structure of *Sierra/Acadia/Redwood*?

- Importance of paid staff
- Importance of volunteers
- Do your volunteers have an input in decision making?
- Do you have a dedicated set of volunteers or are they consistently changing?
- How do you recruit volunteers? Are there any challenges in this?

Can you tell me about any changes to the organisation in the past Years?

- How does it affect your role?
- How do it affect volunteers?
- How does it affect service users?

Are any of these changes influenced by government decisions?

- Does this influence the organisation in any other way?
- Does this influence your role in any other way?

Can you explain how the funding at *Sierra/Acadia/Redwood* works?

- Any struggles in past Years?
- Is there any competition with other voluntary organisations for funding?

Why do you think *Sierra/Acadia/Redwood* is so important to the local community?

- Do you have a main service user profile?
- Have there been any changes to the service user demographics?

10.3 Appendix Three

Interview Schedule – Employees

Can you tell me about your role at *Sierra/Acadia/Redwood*?

- What does this role entail?
- How many hours do you dedicate to this role?
- How long have you been employed in this role?

Can you tell me about the project? [IF APPLICABLE]

- How does it work?
- What is the process of advice?
- What is the client base that you work with?
- Have you worked on any other projects here?
- Why is it important to the local community?

Can you tell me about any changes to your role in particular in the past years?

- Can you think of any changes that have impacted the organisation as a whole?
- Are these changes influenced by government decisions?
- Have you experienced any changes in the client base?

Can you tell me about any previous employment you had before this role?

- How long were you in this employment?
- Why did you choose to work in a voluntary organisation?

10.4 Appendix Four

Interview Schedule – Volunteers

Can you tell me about your role as a volunteer at *Sierra/Acadia/Redwood*?

- Full-time/part-time
- What does it entail? – clients seen, demands within organisation
- Are there any problems that you face in this role?

Can you tell me about how you came to be involved in volunteering at *Sierra/Acadia/Redwood*?

- Why did you decide to volunteer?
- Why *Sierra/Acadia/Redwood*?
- Why advice?
- What was your previous/current area of employment?
- Have you taken part in any other aspects of volunteering?
- How long have you been volunteering at *Sierra/Acadia/Redwood*?

Can you tell me about the process of giving advice at *Sierra/Acadia/Redwood*?

- What are the largest aspects of advice?
- Do you think there is a particular demographic of service user?
- Why do you think people use *Sierra/Acadia/Redwood*?
- Why is the *Sierra/Acadia/Redwood* service important to the local community?

Can you tell me about any changes at *Sierra/Acadia/Redwood* in the past years?

- Have these affected your role as an assessor/adviser?
- Have these affected the organisation as a whole?

- Do you think there has been a shift in the types of issues that are brought to *Sierra/Acadia/Redwood*?
- Has there been a shift in the demographic of the service user?
- Do you think any of these changes are influenced by government decisions?
- Do you think any of these changes are influenced by internal decision?

10.5 Appendix Five

Information Sheet



PARTICIPANT INFORMATION SHEET

Social Policy Reforms and the Merseyside Voluntary Sector

Jordan Griffiths

School of Humanities & Social Science

You are being invited to take part in a research study being carried out by a PhD researcher at Liverpool John Moores University. Before you decide to partake, it is essential that you fully understand the nature of the research and what it involves. Do not hesitate to ask questions if there is anything that is not clear or if you would like more information. Please take this time to read the information below before coming to a decision whether to take part in this research.

What is the purpose of the study?

The aim of this research is to explore the role of voluntary organisations in Merseyside who deliver welfare based advice, their relationship with the state and local community. The information gathered will be used to inform my PhD research and will also be used to produce a report for your voluntary organisation. This will potentially aid the adaptation of services and the perception of the wider community in the future.

Do I have to take part?

It is entirely your choice if you wish to take part in the research. If you choose to do so you will be asked to sign your consent to take part and for your responses to be used in future research publications. You may retain this information sheet for your records. You will remain free to withdraw from the study at any time, without giving a reason. A decision to withdraw from the research will not affect your rights.

What will happen to me if I take part?

In order to gather this information, you will be asked to provide responses to a short interview which will be led by myself. The structure of the interview will be conversational and so you may provide detailed answers to questions or suggest further topics should you wish you do so. The

research period for this project is estimated to take one full year, however you will only be required to take part in one interview which will last approximately one hour

Are there any risks / benefits involved?

The interview will take place within your voluntary organisation building at a time that can be arranged to best suit you in order to ensure that you are comfortable and suffering from as little inconvenience as possible. The aim of this research is to positively impact your voluntary organisations and the services you offer to the local community.

Will my taking part in the study be kept confidential?

The data gathered as a result of this interview will be used in the publication of research by myself at Liverpool John Moores University and therefore responses may be used for a number of years to come. During all times, your anonymity and confidentiality will be safeguarded, any direct quotes shall be anonymised using a pseudonym (false name). In order to ensure anonymity and confidentiality, all questions you subsequently answer are entirely optional. If you feel at any point that uncomfortable with a question, you are not obliged to respond we will move on to a more comfortable topic.

Researcher Contact Details:

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This study has received ethical approval from LJMU's Research Ethics Committee

Reference Number: 16/HSS/028 – 26th May 2016

If you any concerns regarding your involvement in this research, please discuss these with the researcher in the first instance. If you wish to make a complaint, please contact researchethics@ljmu.ac.uk and your communication will be re-directed to an independent person as appropriate.

10.6 Appendix Six

Consent Form



CONSENT FORM

Social Policy Reforms and the Merseyside Voluntary Sector

Jordan Griffiths

School of Humanities & Social Science

1. I confirm that I have read and understand the information provided for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily
2. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving a reason and that this will not affect my legal rights.
3. I understand that any personal information collected during the study will be anonymised and remain confidential
4. I agree to take part in the above interview
5. I understand that the interview will be audio recorded and I am happy to proceed
6. I understand that parts of our conversation may be used verbatim in future publications or presentations but that such quotes will be anonymised.

Name of Participant

Date

Signature

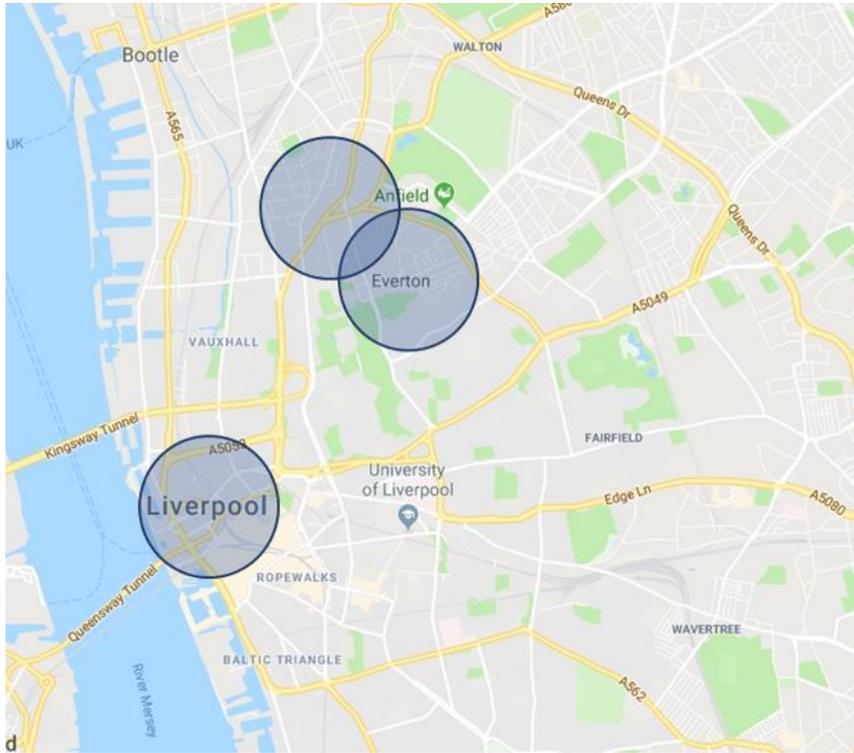
Name of Researcher

Date

Signature

10.7 Appendix Seven

Map of Organisations



(Google Maps, 2018)