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**Heritage Management - An analysis of volunteers' motivations in a Heritage Railway Business.**

**Key words**

Heritage railway, human resource management, career choices, volunteer, motivation, flexibility, work life balance, unpaid work, strategic planning.

**Research objectives**

The research objective of this paper is to examine motives underpinning volunteering, to explore linkages between motivation, career positions of individuals and work life balance in a heritage enterprise.

The context of this paper

**The Bluebell Railway**

The Bluebell Railway Presentation Society (BRPS) is a heritage steam railway attraction operating in West Sussex, England. The BRPS is a volunteer staffed and managed membership association with a mission to:-

- (a) Preserve and operate the railway between Sheffield Park and East Grinstead, and any future extensions.
- (b) Preserve in connection therewith, historic locomotives, rolling stock and other items of railway interest.
- (c) Provide, subject to agreement, for the housing and operation of preserved locomotives and rolling stock and other historic railway artefacts belonging to private individuals and other preservation bodies.
- (d) Encourage interest in, and the study and enjoyment of railway history and operation, and all subjects related thereto.

(BRPS Rulebook draft 9, May 2003)

The Bluebell Railway is recognised as one of the UK's leading railway preservation societies and regularly receives awards for the quality and historical authenticity of its restoration and presentation by industry, leisure and heritage bodies.

## **Reliance on volunteers**

The railway employs (through the operating company Bluebell Railway Plc) a small number of paid (average salary £13,722) members, 7 in management roles, 22 on track and buildings maintenance, and 17 on off-train catering. But overwhelmingly the railway relies on the effort of 400 plus volunteers in operations, maintenance, restoration, construction and management.

As the railway has grown in operations, responsibilities and ambition since 1959, the nature, roles and management of volunteering have changed. Initially preservation, rebuilding and operational activities were intertwined and managed by a relatively close-knit, committed young group of mostly male enthusiasts. They were knowledgeable about railway items, procedures and operations, aided by experienced working or retired railwaymen. LTC Rolt (1953) writing on the 'rescue' of a semi-abandoned short narrow-gauge railway in North Wales, described a 'Boys Own Comic' type team spirit of adventure story where enthusiasm, energy, ingenuity and a fair degree of irresponsibility enabled trains to run at all, much less on time or as a service to passengers. Luckily early passengers also appeared to be committed enthusiasts who forgave a lot - delays, breakdowns, derailments, no two journeys were the same!

## **Business integration of volunteers**

As the railway has evolved into an enterprise with a turnover of £2.3m pa. (BRPS 2002), it has had to focus on revenue objectives, providing a high quality customer experience to visitors who may be less knowledgeable of, or interested in, railway authenticity, less respectful of painstakingly restored items (such as vintage carriage interiors), and less tolerant of failings in the level of service provided by volunteer effort. Thus previous research (Goddin 2001) showed volunteering occurred in a more structured and managed context, in large part tasked with keeping the railway operating, with focus on aspects of customer service such as punctuality, cleanliness, safety. An interviewee put it succinctly saying, 'This is a business we are operating, we are no longer playing trains'.

Some volunteers perform 'safety critical' tasks related to railway operations and regulating public access thereto. These tasks require 'external-orientated' competences which are performed in a social and educational context. For other volunteers, 'behind the scenes' restoration and repair work invoke 'internal-orientated' goals of craft, leisure or hobby interests, where the railway is a context for the volunteer to pursue these skills for 'useful' purposes.

## **Theoretical framework and volunteering**

Literature suggests that volunteers tend to be motivated by goals personal to the volunteer and their social relations (Burke and Lindsay 1985) rather than an altruistic offer to the organisation (Schram 1985), 'most volunteering behaviour is goal - orientated' (Burke and Lindsay 1985 p 93), but volunteers may not be personally clear about the complexity of reasons that motivate them (Moore 1985), particularly where the volunteering activity has persisted over time and become part of the volunteer's life (Ilsey 1990).

Studies of reasons for volunteering were undertaken by the British Association of Friends of Museums (BAFM 1998). This was based on a large sample, over 400 museums, galleries and other heritage properties, where volunteers helped manage, guide or interpret the visitor experience.

The BAFM study found a similar profile of volunteers to the 1997 National Survey of Volunteering (Davis-Smith 1997), a predominance of retired professionals. Gaskin (1998) noted that young volunteers require flexibility and are constrained by the need to balance other commitments of career and family. Tillman's (2001) study of five heritage railways in Yorkshire found that replacing the core 'railway orientated' skills of long-term founding volunteers who are now 50-70 years old is becoming problematic. Younger volunteers need training and certification for 'safety-critical' roles, and there is a growing need to pass leadership and management structures largely comprised of society founder-members to a new generation.

This research is undertaken from a constructivist perspective, the social phenomena of the volunteer activities are ontologically central to the created events and reasoning that we are researching.

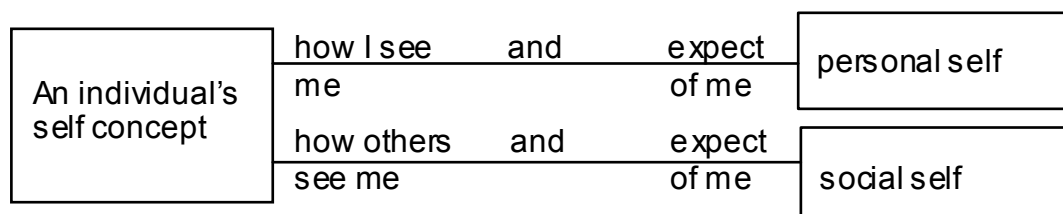
## Work life balance and individuals

Those individuals are drawn to volunteering for work for a variety of personal reasons, although individuals may often share fundamental needs to develop themselves through work. According to the Director General of the International Labour Organisation,

*“Work is a defining feature of human existence - an activity through which individuals affirm their own identity - both to themselves and to those around them. Work can be an expression of unique talents, a way of contributing to the common good, an avenue for engaging deeply and meaningfully within a community”.*

This recently expressed view echoes opinions from social scientists over the last 5 decades. Organisational behaviourists have argued that *“it is only through interaction with other people that we as individuals can learn to see and to understand ourselves as individuals”*. Buchanan and Huczynski (1997).

For Carl Rogers, whose work has influenced so many educationalists, an individual's self concept is developed and refined through both the personal self and the social self.



McCallum 2003 after Rogers

For us as human resource managers, this is a key model, as it is through the development of a consistent self concept that an individual can realise fully one's potential.

Rogers further agreed that the right social environment is required - one in which the individual is treated with unconditional positive regard - although this requirement may be at odds with the social environment provided by organisations in today's global business society. As Colin Fisher (1999) has suggested "*insecurity is a common phenomenon in organisations*".

Statistics dealing with UK and European labour markets detail a changing, potentially insecure position, for many employees.

These note premature exits from labour markets for those of age 50 onwards, with even sharper declines in labour force participation for most of 55 plus. Labour market statistics also spotlight a north-south European divide in the growing number of single households. Although the European average shows 16% of men of retirement age live alone, the figures are considerably higher in northern European countries for both genders. There are wide ranging economic and social consequences of these changes in family and household structure - UNECE suggests in a recent report that single households may constitute a vulnerable group. Labour market sectors in Europe exhibit gender specific tendencies, one of which is that male labour force participation is most frequently full-time, while that of woman's participation is most frequently part-time. For men, the need to interact socially may be more structured - Eurostat reveals that men are more frequently members of a club than women, and participation rates are higher in the North than they are in the South.

It may be that volunteering to work in an organisation such as Bluebell provides a sense of personal identity, an avenue for personal growth and a structured replication of full-time work involvement outside the home, especially for men who have traditionally been less concerned with household tasks. A shared sense of collective identity may be offered by volunteer organisations, with shared goals providing individuals with an opportunity to contribute to corporate success and individual satisfaction.

## **Worklife balance and organisations**

At the moment, skills shortages in the UK and low population growth amongst the indigenous population of the 10 Euro Union countries force employers to think about how they can engage the workforce and persuade them to stay.

Age legislation due to be implemented in the UK in 2006, will reinforce this perspective. The Work Life Balance Survey 2002, conducted jointly by CIPD and Flexexecutive stated that 84% of organisations consulted disagree that part-time workers are less committed, yet Wilmott (2002) found that UK employers were 5 times more likely to offer stress counselling than preventative work balance policies. One of the authors recently conducted a review of organisations participating in the Worklife Balance Survey 2002. The review suggested that family concerns, especially childcare, predominate those organisations' definitions of work life balance. There is little emphasis on development of the individual, provision of (low cost) routes to personal growth, new interests, taking a wider role in society - either

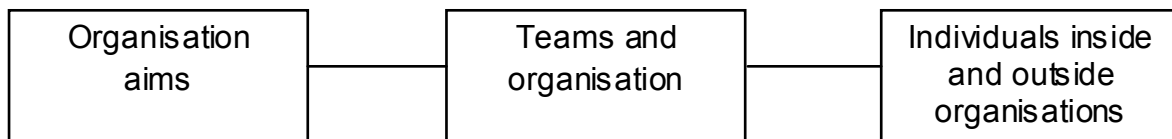
for the intrinsic value of such activities or as a preparation for retirement and gradual transition from earner to non earner.

Existing research on Work Life Balance in the UK is limited in terms of HRM texts, with Claire Day (2002) offering the observation that the dearth of texts in the UK is in contrast to the abundance of US texts over the last 20 years. This is in spite of a raft of European Union directives such as working time regulations which seek to tackle the long hours culture head on. The agency workers' directive, fixed term employee regulations as well as parental leave and part-time workers regulations have all sought to give improved rights to various parts of the labour force, working non-traditional ways of working (such as volunteering) more viable.

According to Day *"there needs to be a way not merely of coping with the changes that are here today but of anticipating and being prepared for most of tomorrow"*.

Vulnerable one-person households do not need to be the end result. It is possible to develop new paradigms which allow us to develop human capital on a better balance, dealing with both skills shortages and individual needs. One major global company (pharmaceuticals) has proposed a *"Freedom on Fridays"* policy to enable employees to nurture their non-employed selves. A major consulting company is providing a release scheme that facilitates community work, such as volunteering to be part of reading hour in local schools.

#### Developing Human Capital



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It is possible for us as HRM managers and developers to learn from the heritage industry. As Ursula Lyon (1996) reminds us, Neuro Linguistic Programming techniques are useful HRD skills *"to enable and encourage others on their journeys"*. Lyon cites 2 skills which appear to be possessed by Bluebell volunteers.

Rapport - ie, responsiveness, a level of comfort or shared understanding.

Anchoring - a learnt response, linking an event or symbol to a reaction.

Safety critical operating tasks on Bluebell develop a common operations management paradigm - sharing beliefs, assumptions, knowledge and problem solving according to Jackson and Carter (2000).

As managers, there is more to find out about individuals and motivation to work from the heritage industry.

## Volunteer Survey

A preferred technique for collecting 'rich data' on volunteer motivations and experience would have been structured interviews and analysis of the narratives captured. However resource constraints prevented this. Therefore 40 BRPS volunteers were surveyed early spring 2003 using an 8 part questionnaire instrument and telephone or face-to-face interview follow-up. A copy of the questionnaire is contained in appendix A. As a researcher and 'insider', I had to maintain awareness that while I shared tacit knowledge with the respondent about the context of volunteering and the heritage railway, my role was to elicit their views on their volunteering experience and motivations.

**Table 1**

**Reasons for volunteering (Survey question 7)  
(A comparison with the BAFM 1998 survey)**

	Percentage of Volunteers	
	BAFM %	Bluebell
(a) I wanted to do something I would enjoy	72	95
(b) I knew the organisation and wanted to work on it	64	90
(c) I had time to spare	62	43
(d) I wanted to meet people (customers)	37	73
(e) I wanted to meet people (colleagues)		90
(f) I was asked to help	29	10
(g) I wanted to do something unconnected to my job	24	46
(h) An opportunity to learn new skills	22	46

Heritage railway volunteers exhibit strong motivation to the railway (response (b)). It is worth noting that BRPS membership is a requirement of volunteering. This is not necessary for other volunteering areas, in fact Holmes (2001) noted that temporary membership would be granted to the volunteer (National Trust) as a reward. Enjoyment of volunteering (response (a)) suggests strong intrinsic benefits are looked for by the volunteers which is congruent with the 'hobby' and 'leisure interest' appeal of railways. However a strong desire for external 'social' appreciation surveyed separately for 'customers' and 'colleagues' in my survey (responses (d) and (e)) suggests that volunteers have a strong sense of a social mission in their work, in reality the Bluebell Railway tends to be a busy place with both passengers and volunteers, and the technical safe operation of a heritage railway requires a high degree of team-working, codified by operating rules.

Responses to volunteering reasons (g) and (h) were actually strongly binomial, half the respondents saw synergies between their career and the skills used in volunteering.

A retired British Telecoms engineer interviewed put it clearly, he wanted to

*‘carry on restoring and maintaining the traditional railway telecoms equipment. I get a pride from a job well done and the railway’s appreciation of it.’*

These volunteers tended to work on the commercial railway, in project management or used technical and engineering skills in their career.

However only half of the 50% who wanted volunteering to be completely different from their career actually wanted to learn new skills:-

*‘A key reason for working at the Bluebell is sheer escapism! It gives me a chance to forget the real world and do something I enjoy that isn’t too taxing.’* (IT Manager)

**Table 2**

Stage of Career	% Sample	Average Age	Number of Years of Volunteering	Average days pa Volunteering	Average Distance from Bluebell (miles)
Career aspirational	27	35	13	28	57
Career managed	40	45	17	30	21
Retired	33	64	14	110	35

**Table 3**

Age of Volunteer (banded)		Number of Years of Volunteering	Average Days pa Volunteering	Average Distance from Bluebell (miles)
26-35	20%	13	38	36
36-45	27%	17	34	41
46-55	20%	16	15	26
56-65	20%	13	130	12
66+	13%	17	80	46

The data on years of volunteering, average days of volunteering, and distance travelled is classified by volunteer age as well as career stage (which the respondents self defined). Some observations can be made:-

- (a) The volunteering commitment of the career aspirational seems in part to be represented by the indicators of distance travelled rather than days available, (Table 2). These respondents face career and family pressures on time rather than travel.

One respondent would typify this position, a senior education manager in IT, he lives 65 miles from the railway, volunteers 6 days a year and has

volunteered for over 12 years. Speaking of the difference between his career, skills and knowledge and those used on the railway he remarks

*'Very true, I don't see a computer all day and that is a good thing - even though I enjoy IT...'*

- (b) The retired have greater availability. The exceptional figure in Table 3 for the 56-65 year old age group actually picks up a number of volunteers who are 'early-retired'. For these it appears that volunteering on the railway may act as a substitute for the lost career, even if it is a different one. A respondent who obviously had not achieved desired personal goals and objectives in his previous career in higher education now volunteers over 100 days pa.

*'Working at the Bluebell Railway is more satisfying than working .... in one of the worst managed new universities in the UK. I derive a high level of personal satisfaction and have made many good friends at the Bluebell Railway.'*

## **Work-life balance issues in the survey**

Tables 2/3 point to this sample of volunteers being willing to maintain a commitment, alongside career obligations, for most the commitment is long term and effectively becomes part of the person's lifestyle, only 20% of those in careers had volunteered for less than 10 years. Those retired were available for a lot more days and intended to maintain this commitment as giving them a new identity and set of social relationships.

Examples have been given where service on the railway has been able to utilise previous work skills (the BT engineer) or provides relaxing escapism unrelated to career demands, (the two IT managers).

For one respondent the development of skills, knowledge and responsibilities through volunteering on the railway from an early age (12) facilitated an easy entry into a post on the commercial railway when interviewed at the age of 18. Now 44 years old he states that:-

*'I have gone further in my Bluebell career (as a volunteer BRPS Operations Director and Trustee) than I ever will with the big railway'*

This example highlights a significant proportion of the responses 30% where volunteering appears to offer a more fulfilling 'career' of intrinsic benefits to the individual, through the possibility of greater responsibility and flexibility in choice of contribution, than the 'paid career' where the rewards, while essential, are seen as purely monetary.

## **A conclusion**

Heritage railways appear to differ from other heritage sector organisations such as museums, galleries, or heritage properties where volunteering provides significant support in three ways.



- (a) Volunteers are society members of the society (BRPS) that owns and operates the railway, unlike a charity or public sector agency (the National Trust or a museum) which provides a professionally managed entity with which volunteers may assist.
- (b) Operating revenues, rather than donations, grants, or membership fees are now the main source of the society's income. Donations and grants are earmarked for special projects such as extending the line.
- (c) The 'retired professional' volunteer profile identified by Davis-Smith (1997) is less applicable to heritage railways, our survey (Goddin, 2001) found less than 50% of volunteers were retired, gender was overwhelmingly male, and a significant number of volunteers came from a non-professional background.

The ambience would appear to be that of a members club operating a visitor attraction with preservational, educational and entertainment overtones. We have commented on data that indicates a high level of intrinsic benefits to volunteers and their choice of volunteering context, combined with a high ranking of 'social' benefits, working with colleagues as an operating team or interacting with passengers in a helpful yet safety-conscious manner.

Our final survey question asked the volunteer sample to rate the balance of intrinsic/extrinsic benefits for them from volunteering on the Bluebell Railway. All respondents saw this not as a trade-off but as a win-win of personal satisfaction, and assisting the Railway and marked the scale accordingly.

## Appendix A

### Bluebell Railway Volunteer Survey

First, please give me some information about yourself

**1. Your age** (tick one box)

- |          |                          |             |                          |
|----------|--------------------------|-------------|--------------------------|
| Under 25 | <input type="checkbox"/> | 46 – 55     | <input type="checkbox"/> |
| 26 – 35  | <input type="checkbox"/> | 56 – 65     | <input type="checkbox"/> |
| 36 – 45  | <input type="checkbox"/> | 66 or older | <input type="checkbox"/> |

**2. Your time with the Railway**

How many years have you:

- (a) been a Bluebell Railway member? \_\_\_\_\_ years
- (b) been a working volunteer on the railway? \_\_\_\_\_ years

### 3. Your volunteering pattern

(a) On average how many days a year do you volunteer on the railway?

\_\_\_\_\_ days

(b) If you concentrate your volunteering, what would be the maximum?

\_\_\_\_\_ days in (which month) \_\_\_\_\_ ?

(c) When do you volunteer

- weekends and bank holidays? (delete) always/mainly/never
- weekdays? always/mainly/never
- during my booked holiday leave? always/mainly/never

### 4. Your journey to the Bluebell Railway

(a) Which form of transport do you usually use? \_\_\_\_\_

(b) How many miles from home to the railway? \_\_\_\_\_ miles

(c) Estimate your 'out-of-pocket' costs of the return journey £ \_\_\_\_\_

### 5. Your stage or career (please tick one statement)

(a) 'Career aspirational' You need to devote your primary energies to progressing your career, maybe with educational, training or responsibility demands.

(b) 'Career managed' Career demands are manageable and foreseeable, you have an opportunity to grow interests and responsibilities outside of your career.

(c) 'Retiring' You expect work responsibilities to decline in the near future, you can devote increasing time to your outside interests.

(d) 'Retired' From previous career, now able to devote time to outside interests as you wish.

(e) If none of the above captures your career position, please write your own short statement:-

6. Any link between volunteering and your present (or previous) career? If 'Yes', give a short example.

- (a) Volunteering supports my developing knowledge, competencies or responsibilities of use in my career.

Example? \_\_\_\_\_

\_\_\_\_\_

- (b) In my career I developed skills and knowledge that I use on the Bluebell Railway .

Example? \_\_\_\_\_

\_\_\_\_\_

- (c) The skills and knowledge I use in my career are quite different to those I bring to volunteering.

Example? \_\_\_\_\_

\_\_\_\_\_

- (d) I have personal goals and objectives that my career does/did not achieve, thus I volunteer.

Example? \_\_\_\_\_

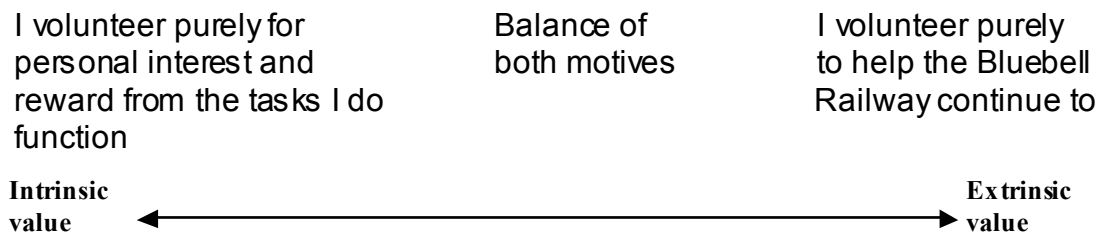
\_\_\_\_\_

7. The British Association of Friends of Museums report on 'Heritage Volunteer Training' (1998) identified the following 'reasons for volunteering'. Please score your response to each on the scale:-

Strongly agree (4)      Strongly disagree (1)      No view on this (5)  
Agree (3)              Disagree (2)

- |  | <b>Score</b>             |
|--|--------------------------|
| (a) I want to do something I enjoy                       | <input type="checkbox"/> |
| (b) I knew the Bluebell Railway and wanted to work on it | <input type="checkbox"/> |
| (c) I had spare time to fill                             | <input type="checkbox"/> |
| (d) I enjoy meeting and helping customers                | <input type="checkbox"/> |
| (e) I enjoy working with colleagues on the railway       | <input type="checkbox"/> |
| (f) I was asked to help                                  | <input type="checkbox"/> |
| (g) I wanted to do something unconnected to my job       | <input type="checkbox"/> |
| (h) It was an opportunity to learn new skills            | <input type="checkbox"/> |

8. Finally, please place a 'X' on the scale below to represent the intrinsic/extrinsic balance for you.



Thank you for your assistance; I will send you a copy of my paper.

Geoffrey Goddin

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