Knowledge Management Strategy in the Non-profit Sector: A Case Study at a UK Heritage Site

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Abstract: The purpose of this article is to explore knowledge management strategy in a large heritage site that is heavily dependent on volunteers. A single site case study approach was utilised and rich qualitative data was generated by interviews with departmental managers. The results of the research suggested that a strong culture of knowledge sharing existed at the site and that it was broadly supportive of the knowledge management strategy. Tacit knowledge was shared extensively within and across volunteer groups and there was evidence of the operation of communities of practice. The outcome of these processes was substantial individual and organisational learning. However, knowledge sharing by managers with volunteers was more prescriptive in some outdoor roles. Managers were also mindful of the need for consistency and accuracy in the knowledge shared with volunteers in order to ensure the provision of a uniform service to the public that was consistent with organisational values. An initiative to promote a volunteer intranet was however less successful.

1 INTRODUCTION

In the 1990's commercial and public organisations began to understand that knowledge was their key asset (Drucker, 1989) and that sustainable competitive advantage and innovation can result from managing their knowledge effectively (Davenport and Prusak, 1998; Nonaka, 1994). This led to greater focus on how organisations learn and on the role of socio- technical systems and information technology (Hislop, 2018). Knowledge sharing was also considered essential to the process of knowledge management because for knowledge management to be successful, organisational members must be prepared to share their knowledge with others (Cabrera and Cabrera, 2005).

However, in spite of growing recognition of the value of knowledge management in public sector organisations (Pee and Kankanhalli, 2016; Sandhu et al., 2011) there is scant evidence of its application in the voluntary and not-for-profit (NPO) sector (Hume and Hume, 2008). This may be considered surprising given the already substantial value of volunteer output to the UK economy. This stood at £23.9 billion in 2012, which amounted to 1.5% of GDP (Foster, 2013). In fact, volunteering has been viewed in recent years in the UK as a method of implementing government policy, and substantial amounts have been apportioned to volunteer infrastructure (Rochester et al., 2016).

The significance of the volunteer workforce is underlined by the fact that 41% of people in the UK took part in formal volunteering at least once a month in 2015-2016 and 60% volunteered informally during the same period (Community Life Survey, 2016). Volunteers are also utilised extensively across the Sport, Health, Education Religious, Cultural and Heritage sectors (NCVO, 2017). Moreover, NPO organisations provide paid as well as voluntary positions (Lyons and Passey, 2006).

The particular importance of volunteers in the heritage sector is emphasised by the case of the National Trust where there are 62,000 volunteers compared to 10,000 paid employees (National Trust Annual Report, 2015-2016). This was a rise of 3% on the previous year and translated into 4.5 million hours donated by volunteers to the Trust. Overall this represents a substantial rise in volunteer numbers when compared to a figure of 34,380 in 2002/2003.

A more recent trend of volunteers managing other volunteers (VMV) has been highlighted by Hill and Stevens (2011). Indeed, an Institute for Volunteering Research survey in 2008 found that a quarter of staff in volunteer management positions were unpaid (Machin and Ellis Page, 2008). However, Hill and Stevens (2011) feel that volunteers who manage other volunteers (VMV) have been excluded from the more

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professional training afforded to paid managers of volunteers in recent years.

This paper seeks to contribute to the sparse research on knowledge management in the voluntary sector through analysis of a case study of knowledge management processes at a large UK heritage site that is heavily reliant on volunteers.

2 LITERATURE REVIEW

2.1 Knowledge Management in the For-profit Sector

A wide range of factors that affect the success of knowledge management strategy have been mentioned in the literature. Such a strategy is often linked to the resource-based view of business strategy where knowledge is a critical resource to be exploited to gain competitive advantage (Barney, 2001). The importance of information technology as an enabler for knowledge management was widely stressed at an early stage (Earl, 2001). Later the consideration of socio technical systems became much more important (McAdam and McCreedy, 1999) as it was realised that information technology by itself could not persuade employees to share their knowledge. Thus, organisational culture and its components became recognised as critical enablers of knowledge management (Hislop, 2018) with effective knowledge management leading to organisational learning (McAdam and McCreedy, 1999). Human Resource Management practices also increased in significance due to their role in developing human capital (Gloet, 2006) and promoting organisational learning (Theriou and Chatzoglou, 2008). Furthermore, according to Hislop (2018), HRM facilitates knowledge management by shaping employees' behaviour through practices such as selection, recruitment and reward.

Typologies of knowledge are also central to knowledge management strategy (Alavi and Leidner, 2001). Polyani (1962) suggested that there are two types of knowledge. Explicit knowledge can be codified into databases for example, whereas tacit knowledge is that which is stored within a person's head. Conversion processes involving both explicit and tacit knowledge form the basis of Nonaka's (1994) well-cited SECI model (e.g. Hislop, 2002; Hoe, 2006).

Hansen et al. (1999) suggested two distinct strategies for knowledge management. First of all, the codification approach consisted of documentation of knowledge, typically explicit, developed from previous experience on repositories. The second approach known as personalisation places much greater emphasis on face-to-face contacts and the transfer of tacit knowledge in an individualised situation (Hansen et al., 1999).

2.2 Knowledge Management in the Non-profit Sector

There are however, many differences between the for-profit and non-profit sectors. Hume and Hume (2008) suggest that NPO's are characterised by shortage of resource and attributes this to the perceived lack of interest in knowledge management within the sector. Rathi et al. (2016) point out that NPO's focus on social value rather than profit but nevertheless highlight the need for them to effectively manage their resources in order to fulfil their purpose by providing services and that knowledge management can be crucial in this respect.

Lettieri et al. (2004) emphasises that NPO's are knowledge intensive organisations, however suggests that knowledge in the non-profit sector is "…heterogeneous, widespread, rarely formalised and unstable". However, Lettieri et al. (2004) also points out a number of ways that knowledge management can help the non-profit sector: Firstly, it can help provide usable knowledge to increase awareness of the organisational objectives and enhance the ability to create social value. Moreover, operational efficiency can be improved and an increased awareness of skills and knowledge required can help to determine realistic development plans (Lettieri et al., 2004). Although Choi (2014) believes that non-profit organisations need a greater focus on organisational learning and the learning organisation. Research by Prugsamatz (2010) suggested that one reason for this could be the focus of many Non-profit organisations on solving external problems rather than targeting possible internal improvements. This could be due to a perceived need to prioritise the fulfilment of organisational purpose (Prugsamatz, 2010).

Empirical research unto knowledge management and indeed knowledge sharing amongst volunteers focuses on festival organisations where volunteering is predominantly episodic (e.g. Abfalter, Stadler and Müller, 2012; Clayton, 2016; Ragsdell and Jepson, 2014). Thus, volunteers return each year often to the same event with enhanced knowledge (Bryen and Madden, 2006). Ragsdell and Jepson (2014) studied knowledge management and sharing at three volunteer managed festivals and found that the values

of volunteers were conducive to sharing knowledge and a master-apprentice model was significant in sharing primarily tacit knowledge. Accordingly, a personalisation strategy (Hansen et al., 1999) was found to be in operation. However, lack of a business infrastructure along with job descriptions, incentive schemes and visions that align with project goals could hinder the establishment of a knowledge sharing strategy (Ragsdell et al., 2014).

Indeed, Human Resource Management such as recruitment practices are significant in supporting a knowledge management strategy in the commercial and public sector (Scarbrough, 2003; Gloet, 2006). However, there is scant literature on Human Resource Management itself as applied to volunteers (Cuskelly et al., 2006). Moreover, Boezeman and Ellemers (2008) point out that recruitment and reward processes used for paid employees lack relevance to volunteers given their different status and motivations.

Abfalter, Stadler and Müller (2012) found that a core group of permanent employees possessed the critical knowledge at the Colorado Music Festival and knowledge sharing was largely on an informal basis and there was evidence of communities of practice (Wenger, 2004). The importance of such communities in creating a knowledge sharing environment is stressed by Lesser and Everest (2001). The website was valued by volunteers as an information source for codified information although more information was requested. Clayton's (2016) research emphasised the importance of the quality of volunteer experience in encouraging both repeat volunteering and an enabling environment for knowledge sharing.

3 METHODOLOGY

3.1 Research Context

This paper is based on a major heritage site featuring a stately mansion. The site is near to a major conurbation in the north west of England. Volunteers come mainly from the immediate community but sometimes from further afield. Volunteers contribute widely in roles such as room guides, greeters, gardeners and estate rangers. They are managed by a full-time team of paid departmental managers and there is also a specialist Volunteer Development Manager. In addition to the volunteer managers, the larger teams also have day organisers, who themselves are volunteers and are responsible for organising the team rotas. Both managers and volunteers gain from training and development interventions. Managers are aware that there are a number of different motivations for volunteering and these impact on the experience the volunteers expect to receive, the type of jobs they wish to try and the amount of development they want or need.

The arrangement of the interviews and invitations to the participants were organised and implemented by the Volunteer Development Manager for the property. Interviews with managers focussed on knowledge management and knowledge sharing as well on as learning, and development of volunteers.

There are three distinct groupings of volunteers at the site. A long-standing group of volunteers, many of whom are retired, have a deep interest in the history of the site, whereas a more recent group has a younger profile and its members are more interested in the social aspect of volunteering. A third grouping are looking for career skills and sometimes more formal qualifications. A number of volunteer engagement initiatives have taken place at the site over the last few years. These have been centred upon narratives that focus on the history of the site. Their purpose has been to develop volunteer skills and also to stimulate interest.

3.2 Research Design

Due to the exploratory nature of the research and the accessibility of participants a qualitative approach has been taken (Cresswell, 2013). Although a single case study approach is context specific (Flyvbjerg, 2006) and not generalisable, a greater depth and insight can be generated (Farquhar, 2012). Managers from all departments that utilised volunteers were invited to take part in individual in-depth interviews. Furthermore, this setting gave volunteers from different areas the opportunity to identify common concerns. Details of interviews with managers are shown below in Table 1.

Table 1: Demographics of interviewees.

Interview Number	Role	Gender
INT 1	Volunteer Development Manager	F
INT 2	Head Gardener	F
INT 3	Visitor Experience Manager	F
INT 4	Learning Assistant	F
INT 5	Ranger	M
INT 6	Ranger	M
INT 7	Assistant Head Gardener	F
INT 8	Assistant Retail Manager	F

4 FINDINGS AND DISCUSSION

Managers largely agreed that there was a knowledge sharing culture at the property and this reflects the findings of Ragsdell and Jepson (2014) who suggested that the values of volunteers supported such a culture.

I think it's very focused around knowledge sharing, people sharing what they know is ultimately the way that the place operates (INT 1).

However, despite the desire for sharing, there was a perceived necessity for a more strategic approach to facilitate and shape the management and sharing of knowledge that could also lead to learning outcomes. Printed bulletins also tended to be read more by volunteers, many of whom preferred written material to online content.

We've set up a bulletin, a fortnightly newsletter that goes out to all our volunteers, mainly because I realized how little people were talking to each other and sharing information…. there is so much to share and people are so keen to learn and share, that it makes sense to have a structure there that enables it to happen (INT 1).

Also, from a management point of view the critical imperative was that volunteers communicated information with the public that the organisation wanted them to share.

If decisions get made by the staff, and people aren't told and educated and told of how we want the organisation to come across to people… and the volunteers aren't told that, then essentially, they could represent us in the wrong way, maybe? (INT 5).

Consistency of knowledge shared was also considered to be important to ensure uniformity of processes and purpose.

I do see it as central in that we need to share that knowledge- if we all have the same knowledge then we'll all work better because everyone knows the same things and it means we can continue to pass that knowledge on to people who join us later on (INT 8).

The Volunteer Development Manager is also clear about the need for a strategic approach to both explicit and tacit knowledge sharing as well as an awareness of the diversity of knowledge and skills gained in other contexts that volunteers bring with them.

I also oversee the overall way in which people share information whether that's on a very informal basis or through our formal learning programs

So, you know, maybe they've had careers, and they've got experience and skills that are really valuable to the organisation but they don't necessarily think to contribute that (INT 1).

Knowledge is often shared by managers with volunteers on a face-to-face basis as part of an everyday task thus involving an exchange of tacit knowledge in an individualised situation. This is very much a personalisation strategy (Hansen et al., 1999), but one that is also aimed at ensuring consistency of information. In this way rituals, routines and values can be emphasised thus reinforcing the desired organisational culture (Johnson et al., 2014).

However, there are some differences in the way knowledge is shared within different teams. In the gardening team knowledge is sometimes shared in a more prescriptive way and sharing of tacit knowledge is not encouraged.

I don't know how much they might learn from each other, but maybe more support each other. I think because generally we explain the job and how it has to be done, so I don't think that there is necessarily an opportunity for somebody else to come in and say "we should do it like this" because we've explained how the job needs to be done (INT 7).

However much tacit knowledge is also exchanged in the breaks which are shared between permanent staff and volunteers. Indeed, overall tacit knowledge exchange resulted in significant informal learning for volunteers (Mundel and Schugurensky, 2008).

Although, volunteers in this area have been upskilled in recent years, the inherent health and safety aspect of operating machinery to some extent dictates a more prescriptive approach. Consequently, explicit knowledge is often communicated in mandatory training sessions concerning Health and Safety.

I would say that things like the machinery work, where you're going to need a certain level of knowledge of health and safety…. as opposed to probably two or three years ago when we were generally only using our volunteers for weeding, collecting leaves (INT 2).

Volunteers generally have more autonomy in indoor roles such as room guides although permanent staff designated Duty Managers have been introduced to check in on volunteer activities. Knowledge sharing is also generally less top down and involves a great deal of lateral sharing amongst volunteers in indoor roles which facilitate situated tacit learning.

They do a stint on their own and then they sit in a room and have tea and biscuits and they talk about things they've learnt, and they love that passing on of information between each other (INT 3).

One example of this has been a group of volunteers with deep interests in the history of the property who have formed a research group, which has characteristics of a community of practice (Wenger, 2004). However, management has been responsible for converting the knowledge produced into explicit knowledge in handbook form to be circulated more widely as in Nonaka's (1994) knowledge conversion model.

So, we've done lots of work around creating handbooks that people can read, drop in session where people can find out about our new project, we have pre-season meetings every year that we feed into (INT 3).

Information technology, which resulted in the codification of tacit knowledge, was the enabler for the earliest type of knowledge management strategy (Earl, 2001). However, because of the older age profile, introducing a comprehensive intranet for volunteers has proved difficult and many prefer more traditional forms of communication.

The database, and the way of recording your personal information and your hours and things, that has pushed a lot of them, some of them aren't interested in engaging with that (INT 4).

However, managers are generally very mindful of the motivations of volunteers as well as long-term or short-term orientation when considering their contribution and readiness for development.

We have people that have been in the group for thirty years and have written the programme and really their motivation for coming is to deliver that….and obviously the social aspect. But, we have younger people who come into that group and don't stay as long but their motivation is really gaining some understanding about that part of heritage and going away with new skills (INT 3).

Transfer of both tacit and explicit knowledge is facilitated further by many volunteers performing more than one role thus gaining an insight into the overall operation of the site. Engagement initiatives that explore historical themes of the site and taster sessions are also extremely popular and frequently oversubscribed. This particularly benefits customer-facing volunteers who are able to share knowledge gained in different departments in roles such as guides or greeters. Thus, organisational learning is achieved through the contribution of individuals (Wang and Ahmed, 2003).

So yeah, if I think about it, quite a few of them have dual site roles across the property. Some of them are room guides, so in the winter when the house is closed they focus more on their retail (INT 8).

Much consideration is also given to how much knowledge it is wise to share with volunteers due to operational considerations and the need to move a process forward. Thus, a less consultative leadership style results in less knowledge sharing (Politis, 2001).

All of our volunteers are very passionate about what they do and they have opinions about things and that's great but sometimes you just need to get a job done as well. So that's when you have to kind of weigh up how much knowledge you're going to share with people (INT 3).

As previously discussed, there is scant literature on HR processes such as recruitment and selection procedures being utilised in the non-profit sector case studies (Cuskelly, 2006; Ragsdell et al., 2014). However, in the case study organisation, recruitment systems are similar to For-profit organisations. All vacancies for volunteers are advertised and comprehensive job descriptions are provided. Furthermore, the strategic importance of the Day Organiser position as a knowledge conduit between permanent staff and volunteers is fully recognised.

It's quite a responsible position…a day organizer will 100% influence their team. So, if we don't feel like it's the right person, then they could be giving completely the wrong message to the team (INT 5).

Consequently, an internal recruitment process is now undertaken and consideration is being given to extending the recruitment pool outside the

organisation. Moreover, in one department a permanent member of staff has taken on the role because of the need for an overview of priorities.

Managers also focus on ensuring that the knowledge that volunteers receive initially is correct and interpreted correctly. Volunteers usually mentor other volunteers and there is always a possibility that bad habits are spread in this way (Broadbridge, 1999).

They're not doing it deliberately different to how you want it, it's just they're first given information, but it's like they perceive it in a different way, and it's trying to understand and bring them back round to reasons why it was done like that in the first place (INT 4).

5 CONCLUSIONS

It is clear that knowledge sharing culture exists at the site. Also, there was certainly little evidence of the instability of knowledge resources suggested by Lettieri (2004) as a characteristic of the non-profit sector.

Previous research confirms that tacit knowledge sharing in a situated learning process is pre-eminent amongst volunteers (Abfalter, Stadler and Müller, 2012; Ragsdell et al., 2014). However, a much more structured approach has been taken at the case study organisation. This is illustrated by the regular bulletins that were introduced to share explicit knowledge, the construction of handbooks and the availability of formal training. On the other hand, the need to tailor the communication to the audience has been demonstrated by the comparative lack of success of the intranet initiative. However, it should be pointed out that previous research has focussed on organisations that utilise volunteers on an episodic basis.

Managers possess the core operational knowledge of the operation (Abfalter, Stadler and Müller, 2012) consequently, they can be careful about which information to share. Furthermore, in keeping with a strategic approach, there is more management of the knowledge to ensure accuracy and consistency. This is also to make sure volunteers share the perspective of the organisation with the public. The Day Organiser role was recognised as a crucial strategic conduit for knowledge between managers and volunteers. Consequently, the utilisation of a formal recruitment process was therefore very appropriate. Thus, a human resource management process more associated with paid employees is utilised, and this acts as a foundation for the development of a knowledge culture.

There have also been suggestions that organisations in the non-profit sector lack a focus on organisational learning (Choi, 2014; Prugsamatz, 2010). However, in this case study, the focus on sharing tacit knowledge and capturing this for circulation to others and re-use for the public suggests that this is not the case. Although, Lettieri's (2004) suggestion that knowledge management can create social value is evidenced in the production of knowledge to enhance the visitor experience and in the communal knowledge creating experience enjoyed by the volunteers.

The recent, more strategic, approach to managing and sharing knowledge has enabled the volunteers to realise their desire to share their knowledge and cultivated their appetite to learn as well as enabling the values of the organisation to be communicated to the public through the volunteers.

Clearly the research is limited in generalisability by the single case study approach. Furthermore, findings in the heritage sector may not be applicable to other volunteer sectors.

Future research could examine knowledge management in heritage and other organisations utilising volunteers Factors affecting volunteers propensity to share knowledge could also be investigated.

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