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## The Impact on Older People's Wellbeing of Leaving Heritage Volunteering and the Challenges of Managing this Process

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## The Impact on Older People’s Wellbeing of Leaving Heritage Volunteering and the Challenges of Managing this Process

### Abstract

The benefits of volunteering for older volunteers and for the organisations who host them is well-documented. The impact of being obliged to leave volunteering due to age-related conditions, and any challenges that this creates for volunteer managers, are under-researched. This study explored how volunteers and volunteer managers experienced this point in the volunteering lifecycle and whether the topic warranted further research. Semi-structured interviews were carried out with fourteen older people, who were (or had been) volunteers at one of three cultural heritage organisations in the north-east of England alongside seven volunteer managers from those organisations. These represented the diversity of heritage organisations in the region. Volunteers discussed leaving volunteering in terms of loss but also indicated that forms of personal appraisal and agency were possible, ameliorating the impact of leaving. Volunteer managers discussed how organisational frameworks and the relationships they formed with volunteers shaped their practices. These relationships created a sense of organisational reciprocity which led some managers to exceed the rules in order to sustain people in their volunteering. The results suggest that supporting personal agency could ameliorate the impact of leaving volunteering but that organisations would benefit from articulating the extent and the limits of that support.

### Keywords

ageing, wellbeing, volunteering, volunteer management, cultural heritage, semi-structured interviews

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# **The Impact on Older People’s Wellbeing of Leaving Heritage Volunteering and the Challenges of Managing this Process**

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The benefits of volunteering for older volunteers and for the organisations who host them is well-documented. The impact of being obliged to leave volunteering due to age-related conditions, and any challenges that this creates for volunteer managers, are under-researched. This study explored how volunteers and volunteer managers experienced this point in the volunteering lifecycle and whether the topic warranted further research. Semi-structured interviews were carried out with fourteen older people, who were (or had been) volunteers at one of three cultural heritage organisations in the north-east of England alongside seven volunteer managers from those organisations. These represented the diversity of heritage organisations in the region. Volunteers discussed leaving volunteering in terms of loss but also indicated that forms of personal appraisal and agency were possible, ameliorating the impact of leaving. Volunteer managers discussed how organisational frameworks and the relationships they formed with volunteers shaped their practices. These relationships created a sense of organisational reciprocity which led some managers to exceed the rules in order to sustain people in their volunteering. The results suggest that supporting personal agency could ameliorate the impact of leaving volunteering but that organisations would benefit from articulating the extent and the limits of that support.

*Keywords:* ageing, wellbeing, volunteering, volunteer management, cultural heritage, semi-structured interviews

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## **Introduction**

In this study we explore the experience of being obliged to leave volunteering in later life because of age-related conditions (e.g., ill-health or caring for a partner). The impact of volunteering on people’s wellbeing is well-documented (e.g., Kragh et al., 2016). However, unpublished data from the “Dementia and Imagination” research project<sup>1</sup> indicated that those wellbeing outcomes might be undermined at the point when older adults are obliged to stop volunteering. There is limited research concerning this aspect of volunteer experience and it is rarely discussed in literature concerning volunteer management (Studer & von Schnurbein, 2013). We sought to explore this topic from the perspectives of both volunteers and volunteer coordinators and determine whether these were issues which merited further investigation. Since our study took place, one survey-based study has been published (Russell, Heinlein Storti, & Handy, 2019) which focuses on volunteer management and confirms that there are issues which need addressing.

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<sup>1</sup> [www.dementiaandimagination.org.uk](http://www.dementiaandimagination.org.uk)

## Background

The term “volunteering” covers a broad range of activities (Holmes & Smith, 2012; Jensen & Principi, 2014). Notwithstanding the complexity of defining voluntary action, the majority of volunteers are people over the age of 50 (Lindley et al., 2014). Internationally, trends in older people’s engagement in formal volunteering can be related to the wider, “welfare mix” within which those people are living (Lindley & Principi, 2014). The welfare mix includes both social resources for supporting older people and cultural expectations of the roles that older people should play in supporting family members. The latter make claims on people’s time which affects their capacity to engage in formal volunteering (Martinez et al., 2011; Stephens, Breheny, & Mansvelt, 2015).

Our study focuses on volunteering in cultural heritage settings. “Cultural heritage” encompasses a diverse array of organisations including both museums and heritage sites, and ranging from small, volunteer-run sites to large organisations which run multiple sites under a common brand. In many countries, heritage organisations involve large numbers of volunteers in a wide range of activities and, in some cases, volunteers outnumber paid staff (Holmes, 2003). Consequently, the management of volunteers is a significant part of the daily work of cultural heritage organisations.

Volunteering has been linked to improvements in aspects of wellbeing (Kragh et al., 2016), including both positive affect and purpose or meaning in life (Greenfield & Marks, 2004), though not necessarily health (Li & Ferraro, 2006). The relationship between volunteering and wellbeing may be two-way (Principi et al., 2016). However, evidence around the wellbeing impacts of volunteering on health and wellbeing are mixed (Heaven et al., 2013; Jenkinson et al., 2013). In part this is related to the complexity and variability of voluntary activity (Anderson et al., 2014).

Broadly, volunteering may impact people’s lives through its mixture of physical, emotional, cognitive and psycho-social activity. Furthermore, the ways that volunteers reflect on their own activity matters. Volunteers may gain greater benefit if they perceive that the activity has worth and that they are rewarded (Heaven et al., 2013), that it provides them with self-esteem (Jenkinson et al., 2013), that they are positively contributing to the wider society (i.e., reciprocity; Martinez et al., 2011; Stephens, Breheny, & Mansvelt, 2015). Personality factors can also play a role (Mike, Jackson, & Oltmanns, 2014). Volunteering can strengthen social networks (Aked, 2015), an important social benefit.

The wellbeing impact of volunteering is also dependent on management practices within the host organisation. However, Studer and von Schnurbein (2013) suggest that the “meso-scale” of volunteer management practices is less extensively researched than the “micro-scale” of volunteers’ motivations and the wellbeing impacts of volunteering.

Exiting volunteering in later life is inevitable and has been linked to a person’s changed capabilities and their ability to meet task demands (Principi & Perek-Bialas, 2014). Other sources point to the importance of other commitments (such as caring for relatives) in the decision to leave (Tang, Morrow-Howell, & Choi, 2010). Exit policies can play an important role in these situations (Holmes, 2003; Principi & Perek-Bialas, 2014). This aspect of the volunteer life cycle is less well developed than others. Exit interviews seem to be the standard way of closing the relationship between the organisation/staff and the volunteer (see, for example, British Association of Friends of Museums, 1999). Managing a volunteer’s exit or dismissing a volunteer is clearly a difficult task (Holmes, 2003) and organisations which have been identified as dealing with this well do so delicately (Principi & Perek-Bialas, 2014). One possible component of this process is to encourage volunteers to take up less active roles in the organisation (Tang, Morrow-Howell, & Choi, 2010). This can extend a volunteer’s involvement in the organisation and act as a prelude to leaving, allowing the volunteer to reach

their own decision about stopping volunteering. Work on retirement decisions indicates that experiencing agency in the retirement decisions correlates with better, post-retirement life-satisfaction (Hershey & Henkens, 2013). This supports the hypothesis that the ways in which leaving volunteering is managed can potentially have positive or negative impacts on sustaining a volunteer's wellbeing after leaving.

### **Rationale**

In this study we aimed to understand the older volunteers' experiences of leaving volunteering and its potential impact on their wellbeing. We also aimed to explore the extent to which managing older volunteers' transitions out of volunteering was an issue that organisations were facing. As part of this second aim, we sought to understand the extent to which existing policies and management procedures already addressed this issue and the personal experiences of volunteer managers who had dealt with these situations. The third aim was to establish whether this topic warranted further study.

### **Context of the researchers**

Davenport and Newman are both interested in the impact of different forms of cultural engagement on the wellbeing of older people. They both have a history of working in and with museums. Moffatt is interested in tackling inequalities in the health and well-being of older people, and applying research to policy and practice. Davenport came across an instance of someone being obliged to leave volunteering at a heritage site (apparently because of their diagnosis of dementia) whilst analysing (unpublished) qualitative data for the Dementia & Imagination project. (Davenport was a researcher on this project and Newman a Co-Investigator.) The distress that the person experienced as a result was evident in the interview. It seemed at the time that no-one had spoken about this aspect of volunteering and we decided to collaborate to see whether this was a wider issue or just an isolated instance.

### **Methods**

This qualitative study utilised semi-structured interviews with ex-volunteers, current volunteers and staff responsible for volunteer management or co-ordination. Participants were drawn from three cultural heritage organisations in the north-east of England: a small, local heritage centre; a large, regional museum; a large, national charitable heritage organisation which runs multiple sites across the country (two sites within the organisation took part). Contacts at the three organisations had expressed an interest in the project when it was first proposed and they represented the range of heritage organisations in the region.

Ethical approval for the study was obtained from the Research Ethics Committee for the Faculty of Humanities and Social Sciences at Newcastle University. Recruitment was purposive and proceeded by working with contacts at the three organisations to identify potential participants. This was followed up either by recruitment meetings on site or via phone conversations. Interviews were booked a week later to allow participants time to consider their decision.

### **Recruitment and Participant Information**

The intention was to interview 15 participants (five ex-volunteers, five volunteers and five volunteer managers). This was determined by the amount of funding available for the project. The number of interviews is insufficient to achieve saturation (O'Reilly & Kiyimba,

2015) but it is sufficient for an exploratory project like this one as the data enabled the authors to reach a judgement regarding whether this issue was one that volunteers and their managers were facing and to determine the terms of any future research. As will be seen, the volunteers discuss the impact of their volunteering in terms comparable with the wider literature on volunteering and wellbeing. This gives us some confidence that what they have to say about leaving volunteering will also be similar to that wider population.

The decision to interview current volunteers was based on the expectation that ex-volunteers would be a hard-to-reach group and that current volunteers could be asked speculative questions. As recruitment progressed, it became clear that a previously unanticipated category of volunteers existed – volunteers who experienced temporary periods of withdrawal from volunteering. Since, at the time, these people did not know that their withdrawal would be temporary, their experiences were deemed to provide useful insights into the research question.

To gain the volunteers' perspectives, fourteen men and women aged between 63 and 85, thirteen retired and one approaching retirement, were interviewed. Two were ex-volunteers; seven were volunteers with experience of one or more periods of withdrawing from volunteering; and, five were volunteers with no experience of withdrawing from volunteering. Six were from the local organisation; five were from the regional organisation; and, three were from the national organisation.

Seven female staff, aged between 38 and 59, involved in volunteer management were interviewed. One manager was from the small heritage organisation. Two staff represented the large, regional heritage organisation (one was the volunteer coordinator and the other led the wellbeing team who worked with older people and who had links with volunteering). Four staff from the national charity were interviewed (one worked at a national level, one worked at a regional level and two worked on sites).

## Materials

Topic guides were prepared for the semi-structured interviews with each group (ex-volunteers, volunteers and staff). Our approach to this study was to consider the impact of leaving volunteering in terms of wellbeing. Accordingly, the topic guides for the (ex-)volunteers interviews incorporated factors that had been identified in prior literature as contributing to the wellbeing impact of volunteering: participants' social status, employment, gender and community involvement (Heaven et al., 2013); the precise nature of the voluntary activity (Anderson et al., 2014); clarity and consistency regarding volunteer roles and goals (Taylor, Mallinson, & Bloch, 2008); social relationships with staff and with other volunteers (Li & Ferraro, 2006; Studer & von Schnurbein, 2013) and working with others (Aked, 2015); the social roles and status gained via volunteering after retirement (Kragh et al., 2016; Mike, Jackson, & Oltmanns 2014); participants' motivations for volunteering (Deery et al., 2011; Stephens, Breheny, & Mansvelt, 2015), their relationship to prior leisure practices (Orr, 2006) and whether motivations change over time (Holmes, 2003). The term "wellbeing" was not used in these interviews.

The topic guide for the interviews with volunteer managers drew on areas identified by prior literature that were potentially relevant to this study: the organisation's motivation for recruiting volunteers; the existence of formal policies for managing volunteers (Holmes & Smith, 2012); the existence of specific, formal exit policies linked to ageing volunteers and their changed capabilities (Principi & Perek-Bialas, 2014); recruitment and induction processes (Holmes & Smith, 2012); the consistency of processes (Taylor, Mallinson, & Bloch, 2008); training and performance management processes for volunteers (Holmes, 2003; Orr, 2006); the prevalence of different patterns of volunteering (Holmes & Smith, 2012; Martinez et al., 2011)

and the impact this has on the relationship between volunteers and staff; the roles that volunteers were offered (Holmes & Smith, 2012); whether the organisation sought to foster a strong social/group identity of being a volunteer at a particular site and/or in the wider organisation (Studer & von Schnurbein, 2013); whether the organisation seeks to sustain volunteers' motivation (Holmes & Smith, 2012); the significance, for the organisation, of potential wellbeing outcomes for volunteers.

## **Procedure**

Interviews were carried out at a location of each participant's choosing. Most participants were interviewed individually. A pair of married volunteers chose to be interviewed together. In one case, a volunteer manager and a volunteer took turns to be interviewed in the presence of each-other.

Participants were asked to complete consent forms before the interview began. Interviews were recorded using digital audio recorders. Participants were debriefed once the interviews were concluded.

## **Transcription**

Transcription is here considered as the first step in the analysis process. The interviews were fully transcribed as verbatim by the first author and in an orthographic fashion. Overlaps, hesitations, pauses and relevant non-verbal features were indicated but pauses were not timed and prosody was not indicated.

## **Analysis**

The analytical approach followed an iterative approach, as described by Tracy (2013), wherein the analysis was not grounded solely in the data but drew on our active interests within the data and the theoretical understandings that the research team brought to the data (see also Camic, Tischler, & Pearman, 2014). Content analysis (Hsieh & Shannon, 2005) was carried out by Davenport using QSR NVivo 11, who also created a reflective notebook on data from all the sites. Potential emerging themes were noted, along with reflections on the significance of responses and possible analytical approaches (Charmaz, 2014)

We anticipated that the structure of the questionnaire might influence participants' responses; however, the term "wellbeing" was omitted with the expectation that the participants would discuss the issues on their own terms. The primary-cycle coding (Tracy, 2013) was intended to foreground the participants' understandings and experiences (Braun & Clarke, 2006) and capture what was salient to them whilst also capturing material from the data which reflected relevant factors identified from literature. Material from different interviews were assigned to a particular code if they shared a common salient feature. Code definitions, captured in code descriptions, were modified when this allowed the code to usefully encompass new data.

Following the initial coding, the content of each topic was reviewed through reflective discussions amongst the research team and further notes were made to develop an understanding of participants' experiences.

Secondary-cycle coding (Tracy, 2013) involved the introduction of analytical codes which organised the material into analytical concepts and the introduction of hierarchical coding to group codes into an umbrella category which made conceptual sense (Tracy, 2013). The latter was also used when some codes were found to be too broad and were subjected to a

further coding processes to disaggregate the different nuances of volunteers' experiences which were relevant to the focus of the study.

A final round of analysis was used to focus on the second-cycle codes which were most relevant to our study. This included the incorporation of data from negative cases which, although they arose from only 2 (ex-)volunteers, provided a valuable counterpoint to the commonalities highlighted in the data.

The following Results section is therefore structured using the codes highlighted in the final round of analysis; it opens with data on the impact of volunteering. This primarily creates a context for the data on the volunteers' experience of leaving. The factors which were identified as moderating the impact of leaving are then presented. Attention then turns to the results pertaining to the volunteer managers. The sub-sections on organisational "policies and values" and on "relationships between staff and volunteers" provide a setting for the section on managers' sense of "organisational reciprocity" and how that influences their practices around leaving. This is explored through sub-sections on "staged transitions" and staff "going beyond the bounds" established by the policies.

## Results

### Volunteers - Impact of volunteering

Table 1 shows the codes emerging from the analysis which relate to the aspects of volunteering that had impact on participants. The emotional impact of an activity has been separated out from the activity itself, as these may provide different pathways to wellbeing.

**Table 1:**

*Summary of codes which relate to the aspects of volunteering that had an impact on volunteers, interviews with staff are included where they talk about the impact on volunteers. (Sources = transcripts. References = selected pieces of text from within a transcript.)*

Aspects of volunteering	Sources	References
Affective responses	16	68
Giving back-helping-sharing	13	40
Friendship or social relationships	12	25
Learning	11	18
Negative impacts*	6	10
Respite	5	5
Filling time or replacing work	3	4
Physical exercise	3	4
Confidence	2	2
Belonging	2	2
Relaxation	2	2
Sense of purpose	2	2
Self-esteem	1	3
Thriving	1	1
Keeps you young	1	1
Focus	1	1
Creates routine	1	1
Space for creativity	1	1

\* "Negative impacts" is an umbrella code which groups together aspects of the volunteering which volunteers discussed as having a negative impact (e.g., physical discomfort)

Instances where volunteers discussed acts of giving back, helping or sharing were grouped together under a single code as these could all be related to the notion of reciprocity (Stephens, Breheny, & Mansvelt, 2015); friendship and social relationships; and learning. The term “wellbeing” was not used in the interview schedule with the (ex-)volunteers. Nonetheless, the topics identified in the participants’ responses are consistent with factors that have been identified, in previous research, as contributing to volunteers’ wellbeing.

### Volunteers – Anticipation and Experiences of leaving volunteering

The terms that people used to talk about leaving volunteering as an imagined, future experience are shown in Table 2. The terms used by those that had left volunteering or had experienced temporarily withdrawal from volunteering are presented in Table 3.

**Table 2**

*Summary of coding of relating participants expectations of the experience of leaving volunteering. (Sources = transcripts. References = selected pieces of text from within a transcript.)*

Anticipating stopping	Sources	References
Negative affect	7	11
Loss of benefits*	8	15
Relates to wider context	5	6
Resisting stopping	4	5
Self-aware hopefully	2	4
End gradually	2	3
I do it to suit me	1	1

\* Loss of benefits is an aggregated term which captures all the instances where participants talked about losing “things” that had elsewhere been linked to the impact of volunteering by the participants.

**Table 3**

*Summary of coding of relating participants experiences of leaving volunteering. Interviews with staff are included where they talk volunteers they managed out of volunteering. (Sources = transcripts. References = selected pieces of text from within a transcript.)*

Experiences of stopping	Sources	References
Negative affect**	8	11
Wanting to return	6	8
Relating to a wider context	5	8
Loss of benefits*	5	5
Deciding to stop	3	6
Resisting stopping	3	5
Letting people down	3	3
End of a stage in life	2	5
Pain	2	4
Comfortable with decision	2	3
Achieving closure	1	3

Ending gradually	1	3
Second retirement	1	1
Thrust on us	1	1
Out of the habit	1	1

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\* Loss of benefits is an aggregated term which captures all the instances where participants talked about losing “things” that had elsewhere been linked to the impact of volunteering by the participants.

\*\* Negative affect is, in this case, an aggregated term which captures both expressions of sadness about leaving and fear or worry that participants might not be able to return.

Comparing Tables 2 and 3 shows that many of the responses are similar but respondents’ experiences were more diverse than their anticipations. This is what should be expected, given that people’s anticipations of future scenarios are generally lacking in detail and based on preceding experiences (Gilbert & Wilson, 2007).

The interviews indicated that older people did think about a time when they would have to stop volunteering especially as that time drew nearer. Thus, anticipating leaving volunteering in the future is a part of older volunteers’ experiences. Participants’ responses indicate that leaving volunteering is experienced as a loss of those things that are valued in volunteering along with the associated negative emotions. The emotions included: sadness, loss, boredom, frustration and depression. Thus the (ex-)volunteers anticipated or experienced leaving volunteering as a loss of the things which contribute to their wellbeing, which is in line with the initial assumption of the study. However, there are modifying factors which are worth further consideration.

### **Volunteers – Modifying Factors - Appraisal**

This captures the sense that the ways in which volunteers assess a situation shape their emotional responses to that situation. One participant talked about how they volunteered to meet their own needs and if those needs changed then so would the pattern of their volunteering:

I would think I’d get tired. I mean, there are days here when, “Oh! That was (too)... Nobody’s been in, I’m bored to death. Oh God!” And I go ‘cause I do it to suit me and I think, if I wasn’t enjoying it anymore and if you weren’t well... (Volunteer, local organisation)

Another respondent viewed the end of their volunteering at the regional organisation as being the end of a stage in their life:

I felt, well I thought about it quite a bit. [...] And, I felt quite comfortable with the decision. I didn’t feel I was letting anyone down ‘cause I’d been there so little time over the, erm, last summer and autumn and it just felt, “Right, well that stage has gone.” [...] So, yes. (Volunteer, regional organisation)

The sense of pragmatism expressed here has much in common with the first respondent and both are in marked contrast to other respondents, who talked about the loss of volunteering as the loss of something that gives their life meaning: “It would be the end of my life” (Volunteer, local organisation). The second respondent also plays down the possibility of

letting people down (a possibility that troubled other participants) and expressed a sense of closure or moving on.

These two cases suggest that not all volunteers will experience stopping as loss. The contrasts and comparisons suggest that similar life events are open to different forms of appraisal (Troy & Mauss, 2011) which moderate the impact of the event on their subsequent lives. For the two respondents quoted above, their pragmatic approach to volunteering allows them to view the situation more positively.

### **Volunteers – Modifying Factors – Agency**

Some of the topics discussed by participants suggest that they could exert different forms of agency as they approached the end of their volunteering. These include “resisting stopping,” “deciding to stop,” “ending gradually,” “achieving closure,” and “self-awareness, hopefully” (Table 3).

Four respondents talked about resisting stopping in different ways. This might be through hiding the problem which threatened their volunteering: “(I would hide) the health reason, I have in the past. I’ve hid that and kept on coming down” (Volunteer, local organisation). Or, it might be through finding structural solutions to overcome the challenges that the volunteers’ faced:

I’ll get here. [...] I’d get a taxi. [...] I just think, I’d find a way [...] I was only thinking about this the other night, I thought, “Well, if I end up in a wheel-chair, you can still get (there) with taxis with wheel-chairs and there’s buses here that’ll take a wheel-chair.” So, unless I’m absolutely bed-fast, my life can continue. (Volunteer, regional organisation)

Both of the quotes regarding resisting stopping are from interviews with participants who had previously experienced temporary withdrawals from volunteering and they are reflecting on past experience of resisting stopping.

Other participants talked about how their volunteering activities could be adapted over time to meet the changing capacities of the participant: “But, I’m going to have to play it by ear and, as I was saying to <Volunteer Manager>, maybe next year I’ll put me name down for one day a week and just see how that goes.” (Volunteer, national organisation). By ending gradually and taking an active role in this decision, the volunteer exerted a degree of agency over when and how to leave. Linked to this, the same volunteer at the national organisation was able to achieve a sense of closure in their volunteering:

I’m just taking it (.) gradually, err, I’m going to shut down, I’m going to get the rest of [my] books sorted out and take them up into the conservation room. And, when I’m happy with that, I’ll close the doors and lock the key and give them to <Volunteer Manager> and says, “It’s yours.” (Volunteer, national organisation)

This reveals the possibility, where volunteers have been working on a long-term, discrete project, of using the completion of that as a milestone. Achieving closure is both a form of agency and appraisal, in the sense that the volunteer has actively set out to complete a project and, having done so, can conflate the end of the project with the end of his volunteering and thus experience this phase of life as drawing to a close. Other respondents talked of making an active decision to stop in response to the physical pain and discomfort caused by a specific volunteering activity. Other instances were recounted by volunteer managers, recalling how

volunteers came to them and explained their decision to stop. In some of these instances, it was less clear whether the volunteers experienced the situation as a decision or whether they felt compelled by circumstances (or family members) to stop volunteering. Nonetheless, this suggests that volunteers can take ownership of the situation.

The respondents also perceived that experiencing and exerting agency is contingent on being aware of one's own situation, something which is not guaranteed:

I've got a couple of friends who think they're not getting old, they can still do all the things they did before and get cross when they can't and they don't understand why other people say, "No, no, you've got to be...", you know. (Volunteer, local organisation)

The importance of self-awareness was underscored in interviews where the discussion turned to volunteers who had dementia and who were seemingly unaware of their own capacity or unable to recall earlier conversations about volunteering activity (see "Volunteer Managers – Going beyond the bounds").

The following sub-sections present a series of linked topics which help to understand the issue of managing volunteers' leaving: Firstly, how organisational policies and values frame the ways that the organisations work with volunteers. Secondly, the nature of relationships between staff and volunteers. Thirdly, how staff perceive the need for organisational reciprocity. Finally, a cluster of topics which explore how leaving has been worked out in practice – staged transitions towards leaving, staff going beyond the bounds of what is formally required of them, the limits to this process, the emotional impact of this process.

### **Volunteer Managers - Policies and values**

All the organisations collaborating in the project had a volunteer policy. In addition, each organisation had either a statement of values and behaviours, a set of broad guiding principles or a mission statement. These played complementary roles in the work of the volunteer managers.

The policies provided managers with a framework and confidence from knowing that the organisation supports a line of action. However, they also discussed how there is a degree of individuality in how they implement those policies:

[The] policy, the volunteer journey(?) helps me [...] if I have to go down a certain row [...] But a lot of it is kind of, [...] it is self-taught. 'cause it is not an easy job [...] and I think my personality in how I talk to people [...]. But it's good for me to know that there is this overarching, defined rulebook. (Staff member, national organisation)

Balancing the value of the framework against the need to respond to volunteers as individuals with their own needs was seen as important. However, it also creates the potential for inconsistencies in volunteer management practices across the organisation.

For some volunteer managers, the topic of asking people to leave appeared to be a lacuna in the volunteering policy:

Interviewer: [So], if you think about that situation where at some point the likelihood is that someone's going to have to ask <a volunteer> to stop, do the policies help you do that?

Respondent: No. [...] Absolutely not. It's like black and white and (.) It's probably because the policy's been pulled together I think, from a little bit from here and a little bit from there. It's been that standard, generic volunteering policy. (Staff member, local organisation)

A similar response was gathered from staff at the regional organisation. Indeed, participating in the study functioned as a prompt to staff at the local and regional organisations to reconsider their policies. Values, then, appeared to play a role in situations where policies did not help.

Values appear as broad statements of how organisations (or the individual staff and volunteers within them) should operate. They provide principles for practice or, at least, they should:

I don't see the sense in having a mission and values and then just, just as a statement. It's got to drive your practice. [...] It really does and it bugs us when you get people doing mission creep [...] you've got to hammer home "What is your mission?" "What are your values?" [...] they should be reflected in your work, in your practice. (Staff member, local organisation)

The national organisation published a clear the statement of values shaped the way that all staff and volunteers worked together. The staff from the national organisation consistently stated the importance of these values for their professional practices. The shaping role of formal values was clear for the manager from the smaller organisation, though these overlapped strongly with their own personal values. Personal values, rather than organisational ones also seemed to play a stronger role in the regional organisation, though the organisation has a set of guiding principles. Nonetheless, in all three it was clear that the mixture of personal and organisational values shaped the interactions between staff and volunteers.

The issue of managing someone out of volunteering appears as something of a grey area where policies and values provide help but where staff also need to work with volunteers individually. Thus, the relationship between staff and a volunteer is important.

### **Volunteer Managers - Relationships between staff and volunteers**

All the staff interviewed commented on how volunteer management relied on good relationships between staff and volunteers, though the depth of those relationships was seen to depend on the patterns and duration of someone's volunteering:

[We've] got seasonal, short-term and long-term volunteers [...] we say we tend not to treat them differently. But is it that, like, you know, duration of service [...] I guess [...] it's easier to let somebody short-term go. But if you've had somebody who's given years and years and years and you don't want their journey as a volunteer to end abruptly and [say] "Right, that's it, you've given us all you can and you're no good to us anymore." It's a different scenario, isn't it? (Staff member, national organisation)

Although good relationships enable management conversations to take place (more) successfully, the depth of relationship also made the process of bringing that relationship to an end more difficult. Notably, one respondent offered the caveat that the personal aspect of the staff-volunteer relationship needs to be balanced by a professional aspect in order to function well, especially when discussing difficult topics.

### **Volunteer Managers - Organisational reciprocity**

Many of the staff expressed the sentiment that a volunteer's service to an organisation entails a reciprocal duty of care on the part of the organisation:

But you do! I think, I feel, like, really responsible for the volunteers [...] I want them to know that they're valued. [...] I think because they're giving their time and they give so much of it. (Staff member, regional organisation).

This and the previous quote reflect the sense that because volunteers have given time that they, as staff members, ought to value them through the way they are managed. This organisational reciprocity was also presented as having managerial value, with staff linking it to improving volunteer performance or meeting an organisational need. However, the volunteer manager at the larger site in the national charity also indicated that not all their colleagues felt the same way.

### **Volunteer Managers - Staged transitions**

One of the possible responses to a volunteer's increasing frailty is the attempt to stage changes in their volunteering activity, moving them gradually towards leaving:

I mean, routinely, [...] people will want to scale back what they're doing, reduce the physicality of it or reduce the time or whatever or the type of activity and will have that conversation [...] and will agree on a different role or a different activity. [...] It's when it gets to the crunch, when [...] [volunteers] have been supported to stay in whatever way we can do. It's when it gets to that point, that's when there can be an issue. (Staff member, national organisation)

This respondent works for the national organisation at the national level overseeing the management of volunteer experience across the whole organisation and here they are talking about their observations of practices across multiple sites. This practice of scaling back or changing the nature of the voluntary activity was generally recognised as a model of good practice. However, as this quote indicates, there is a limit to how far such staged transitions can go. Respondents discussed instances where staff deferred that "crunch" point.

### **Volunteer Managers - Going beyond the bounds**

The staff respondents talked about supporting a volunteer to stay involved beyond what might be expected if they were a staff member.

[We] always say "The only difference between volunteering and working is, you know, volunteers don't get paid." [...] [But] then there's, sort of, is there a responsibility and an obligation because of what a volunteer has given, and their support, [...] [to] not kick them out on the street, like you would with a job? [...] And then, to break that off is... you know, where does it lie? Where is the line? And where does that obligation...? (Staff member, national organisation)

Here, the respondent, who manages a site in the national organisation, draws on the notion of organisational reciprocity to pose a question about how the volunteer-organisation relationship should be ended and how far should it be sustained. The idea of supporting

volunteers “beyond the bounds” took different forms. This was mostly discussed in terms of staff adapting their practices to provide additional support to a volunteer (see below). The regional organisation was also considering the possibility of volunteering activity which could take place off-site, making it easier for volunteers to contribute.

However, respondents also reflected on the limits to their (or their colleagues’) capacity to sustain people in their volunteering:

[One] place where one volunteer was phoning up twenty times a day to ask when her next shift was. [...] And the, the staff there, it took up so much of their time and their emotional energy. But they loved this woman and they wanted to support her, so they would write, they wrote it all down for her, in a timetable to take home. But she still would call [...] ‘cause she didn’t know what day it was. So she wasn’t sure. So the other support wasn’t in place, do you know what I mean? [...] So she wasn’t able to know what day it was anyway. So having a timetable didn’t help. So we are not equipped to be able to support in the round. And neither should we, should we be. [...] Because of our staff (that) are stretched anyway. So we’re not equipped. They don’t have the skills to provide that social care. (Staff member, national organisation)

Here, the staff member (who works at a national level) is reflecting on the experience of staff at one site. The claim that the staff “loved this woman” and “wanted to support her” can be seen as manifestations of the sense of organisational reciprocity noted earlier. The story also highlights the burden that this creates for the staff in terms of time and emotion. Clearly the respondent feels that the situation put the staff into a situation that they were not trained for and which was not sustainable. There are limits to the extent to which staff can support a volunteer to remain involved in the organisation. Where those limits lie appears to be unclear. In this case, the management processes are also breaking down because they rely on volunteers being able to recall and act on prior conversations. Formally, this should be judged in terms of business needs; informally, this sense of organisational reciprocity means that staff might be inclined to push the bounds of that judgement.

Dealing with these situations had an emotional dimension for the staff involved, as well as the volunteers. The emotional element of having a “difficult conversation” is expressed in different terms: “hard,” an “awful situation,” as experiencing “sadness” or, as above, discussed in terms of “emotional energy.” The policies presented earlier help with these situations but cannot efface the emotional element of a situation.

## **Discussion**

Our study considered the impact on older volunteers of leaving volunteering due to age-related conditions. It also sought to understand the extent to which this was an issue that cultural heritage organisations are facing. The participants were all staff, volunteers or ex-volunteers who were (or had been) involved in cultural heritage organisations in the north-east of England.

Regarding volunteers, the key findings from the analysis are that participants talked about the impact of volunteering in terms that could be interpreted as elements of wellbeing, though wellbeing was not a term the (ex-)volunteers used. The majority of respondents anticipated, or experienced, leaving in terms of losing the positive benefits of volunteering and the negative emotions associated with that loss. This has the potential to undermine their wellbeing in the longer-term.

The findings also suggest that it was possible for volunteers to moderate that experience of loss through forms of agency. The discussion of “resisting stopping” was often based on

prior experience of struggling to return to volunteering after periods of ill-health or injury. It reveals the value those respondents placed on volunteering but also that they could undertake, sometimes clandestine, actions which sustained their volunteering. This agency can also be exercised in collaboration with staff. This is in line with recommendations regarding volunteer management (Principi & Perek-Bilias, 2014). Analogous research regarding retirement transitions (Hershey & Henkens, 2013; Matthews & Nazroo, 2016) suggest that such agency has the potential to improve wellbeing after leaving volunteering. The idea of appraisal (Troy & Mauss, 2011) suggests that the way that individuals appraise elements of a situation has a role in the long-term impact of that situation. The range of responses captured in the present study suggest that the participants considered the volunteering and the end of it in different ways with some judging it more pragmatically and less negatively than others. Troy and Mauss (2011) also suggest that this appraisal process is malleable and can be influenced by training, which leaves open the possibility that volunteer managers can have a role here too.

Managing older volunteers out of volunteering was found to be an issue facing the organisations who took part in the study and, by extension, other cultural heritage organisations who are reliant on volunteers. Formal policies created a framework within which volunteer managers could operate with greater confidence knowing that they had the organisation's backing. This is in line with the recommendations from Holmes (2003) and Principi and Perek-Bialas (2014). However, the policies appeared to be a framework for behaviour, rather than a fully determining set of practices, which left staff with the scope to manage volunteers in the light of their own values and local or individual circumstances. This freedom seems to be both beneficial as well as being the source of (potential) inconsistencies in volunteer management within the organisations in the study, which may negatively impact volunteer satisfaction (Taylor, Mallinson, & Bloch, 2008).

The patterns of volunteering and the organisational structures used at each site shaped the nature of the relationships between volunteers and volunteer managers. Good relationships were seen as underpinning good volunteer management and played a role in the conversations around leaving. The freedom afforded by the volunteer policies allowed these conversations to be informed by the relationships at work whilst still supporting the professionalism which has been identified as being a necessary part of the volunteer-staff relationship (McNamee & Peterson, 2014). However, managing the line between personal and professional was seen to be challenging.

The conversations about leaving are sometimes linked with staged transitions towards less involvement, which function as a means of supporting a volunteer by helping them reach their own decision about leaving. This is in line with advice on good practice (Principi & Perek-Bialas, 2014; Tang, Morrow-Howell, & Choi, 2010) and fits well with the desire for agency expressed by some volunteers.

Volunteering is sometimes explored as a mechanism for supporting a sense of reciprocity (i.e., giving back to the wider community) and this emerged in the volunteers' responses. Stephens, Breheny, and Mansvelt (2015) argue that there is a widely shared understanding of reciprocity as a moral force. This was also experienced by the staff towards the volunteers. Most staff took account of volunteers' contributions to the organisation. This reciprocity is contingent upon each volunteer's history of volunteering and their relationship with staff but appeared to shape the way that staff worked within the policy/values frameworks around leaving.

One notable consequence of this sense of organisational reciprocity were the reported instances where staff went beyond the formal calculations of effort vs business need to support volunteers on-going involvement in the organisation. This "going beyond" took different forms but were rationalised in terms of reciprocity. It was equally clear that there were limits to these actions, where time pressures and emotional efforts on the part of staff could no longer be

sustained, which had negative emotional impacts for some staff. At these points, exit conversations became necessary.

The possibility of these actions is dependent on the freedom afforded by the policies and values. The findings suggest that the limits were experienced on a case-by-case basis rather than being prescribed. However, the difficulty of extricating staff from these situations perhaps reinforces the need, identified by Holmes (2003), to explicitly build exit decisions into the volunteer programme and ensure that volunteers are aware of this. The findings presented here suggest that this should be extended to an articulation by staff of how far they are willing to support someone to stay in volunteering.

There are two further implications of these findings. Firstly, these processes are contingent upon the capacity for conversation to take place and be remembered. This becomes more challenging if the volunteer is experiencing forms of memory loss or is unaware of their own capacities. Secondly, it was noted earlier that older people's volunteering patterns are contingent upon the wider welfare mix of social supports for, and expectations on, older people's lives (Lindley & Principi, 2014). Arguably, organisations that involve older volunteers already are part of that mix but when staff go beyond what is needed of them to support a volunteer then they take up a larger role. Again, the findings suggest that there is merit for such organisations to articulate the limits to which they are willing and/or able to take up that role.

Our study was intended a small-scale, pilot study. As such, the primary limitation is its size. Staff and volunteers from three organisations were interviewed, and the organisations represented the diversity of cultural heritage organisations in the north-east of England. Furthermore, the overlap between the (ex-)volunteers' responses regarding the impact of volunteering and the wider research findings on volunteering and wellbeing provide confidence that these respondents are similar to the wider populace of volunteers. The detailed findings from the study cannot be extrapolated to all cultural heritage organisations within the UK or elsewhere. Nonetheless, the findings do suggest that there is merit in exploring the topic further on a wider, national scale.

One of our aims was to explore whether this topic was an issue that staff within these organisations were dealing with. It appears that the staff interviewed were confronted by this issue and they felt that it was an area that needed further exploration and development. The findings of the study also suggest that further research work is needed to explore management practices around the issue of helping older people to transition out of volunteering in a way that minimises any potential negative impacts. Further research is also needed to explore how organisations can develop management structures which articulate their position on this issue in a way which leaves managers the freedom to act but supports them in their decision-making. Such a process of articulation could have positive effects on both volunteers and on volunteer managers.

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