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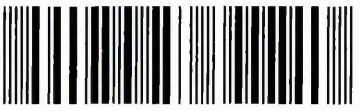

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The Power of Ideas:
The State-Sector Relationship in Policy And Practice

Ellen Katherine Bennett

A thesis submitted in partial fulfilment of the requirements of
Sheffield Hallam University
For the degree of Doctor of Philosophy

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CONTENTS

Abstract	*i*
Acknowledgements	*ii*
Candidates Statement	*iii*
List of illustrations	*vii*
1. Introduction	**1**
1.1 Background	2
1.2 Key Concepts and Understandings: the voluntary sector	5
1.3 Research Questions and Aims	9
1.4 Theoretical Overview	10
1.5 Methodological Overview	13
1.6 Structure of the thesis	15
2. The Voluntary Sector as an Object of Policy	**17**
2.1 The State-Voluntary Sector Relationship 'Pre-Policy'	18
2.1.1 The emergence of a 'formal' relationship: Charity Organising Society and Councils of Social Service	21
2.2 The Relationship in the Policy Era	23
2.3 Conclusion	31
3. Methodology	**32**
3.1 Discourse and Institutions: The Development of a Research Methodology	38
3.2 The Societal Level: Discursive Analysis of National Documents	41
3.3 The Analytical Approach	45
3.4 The Micro Level: Discursive Analysis of Actor Accounts	49
3.4.1 Actors from which organisations? The choice of LIOs	50
3.4.2 Qualitative Interviews	51
3.4.3 Identifying Participants	54
3.4.4 Data Collection	59
3.5 The Analytical Approach	60
3.6 Ethical Considerations	64
3.7 Conclusion	67
4. Institutional Logics and Policy Eras: A Discursive Analysis	**69**
4.1 Studying National Documents as Institutional Messages	73
4.2 Documentary Analysis	80
4.2.1 The transition to the Conservative political era of 1979-1997: the Wolfenden Committee's Report as a transition document	81

4.2.2 Institutional logics conveyed through institutional messages of the Conservative administration 1979-1997 84
4.2.3 The transition to the next political era: the Deakin Commission's Report as a transition document 88
4.2.4 Institutional logics conveyed through the institutional messages of the New Labour administration 1997-2010 91
4.2.5 The transition to the next political era: The Conservative Party's Green paper as a transitional document 98
4.2.6 Institutional logics conveyed through the institutional messages of the Coalition administration 2010-2015 101
4.3 Conclusion 106

5. Field Implications of Shifting Logics: An Analysis of Actor Accounts 110
5.1 Voluntary Sector Perspective: Organisational Fields 113
5.2 Analysis 117
5.2.1 Changing field structures 117
5.2.2 Alternative methods of communicating and working 121
5.2.3 Disruption at the field level 124
5.2.4 Inter-organisational collaborations 129
5.2.5 New field structures 131
5.2.6 Demonstrating and promoting the quality of work in the voluntary sector 133
5.3 Conclusion 135

6. Discursive Identity Work: Exploring Actor Narratives 137
6.1 Identity work as an example of institutional work 139
6.2 Logics as a resource for identity work 142
6.3 Analysis 146
6.3.1 Voluntary sector identity: definitive ethos, mission and values 146
6.3.2 Identity work: devices to resist identity cues associated with a dominant Logic 154
6.3.3 Identity work: rejecting the identity cues of the market rationality logics 161
6.4 Conclusion 166

7. Concluding Discussion 168
7.1The Contributions to Knowledge 169
7.2 Limitations of this study and future research possibilities 184
7.3 Concluding remarks 186

References 188

Appendices

Appendix 1: Policy Timeline	a
Appendix 2: Extract from discursive analysis narrative (policy analysis)	b
Appendix 3: CRESR Ethics Approval Pro-forma	d
Appendix 4: Research Overview for participants	g
Appendix 5: Sample letter to potential participants for scoping interviews	i
Appendix 6: Interview guide (main research phase)	j
Appendix 7: Sample consent form	l
Appendix 8: Interview schedule (main research phase)	n
Appendix 9: Extracts from research diary – typed	p
Appendix 10: Extract of discursive analysis of actor accounts	q
Appendix 11: 'Data maps'	v

ABSTRACT

This thesis explores the relationship between the state and the voluntary sector as expressed within national documents and individual actor accounts. It is a response to the tendency within existing studies to cast voluntary sector organisations as passive in their context, responding to ideas from the central state rather than playing an active role in how and why particular ideas take hold. By first considering how the voluntary sector emerged as an object of policy, this thesis moves on to explore how both national texts and individual actors within organisations discursively present the role of the voluntary sector, the role of the state, and the relationship between the two.

In order to explore this topic, this study uses a discursive methodology to consider the ideas within national documents and narratives of actors from Local Infrastructure Organisations (LIOs). This study drew on discursive approaches, such as discourse analysis, and sought to consider how and why ideas were constructed and used within different texts.

This thesis contributes to knowledge in a number of ways. First, within the study of national policy documents, this thesis proposes an approach to bridging empirical studies of the societal and the micro levels of analysis, drawing on concepts of institutional logics and institutional message to demonstrate how national documents construct and convey institutional identity-cues for voluntary sector organisations. Second, within the study of the narrative of LIO actors, this study makes a series of contributions relating to the way we conceptualise what is happening at the organisational field level, linking the shifts in ideas at the societal level with the actor accounts of the implications of, and responses, to these shifting institutional logics. Third, the discursive analysis of actor accounts enables a consideration of the ways in which LIO actors are engaging in forms of identity work in order to align with, and distance from, voluntary sector identity-cues presented within national documents.

These contributions are significant, particularly in light of debates surrounding the deepening austerity agenda, and associated cuts to services across communities in England. Such cuts have, at times, been presented within a narrative of the voluntary sector emerging to 'fill the gaps' and it is therefore important to start to understand how voluntary sector actors might be responding to such cues. This study therefore has implications for both sectors but also beneficiaries of both state and voluntary sector services, as it illuminates the way in which ideas are developing, and the way in which these ideas are reworked by actors at the local level.

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LIST OF ILLUSTRATIONS

Figures

Figure 3.3.1: Extract from Cross Cutting Review 46
Figure 3.3.2: Extract from discursive analysis narrative 47
Figure 3.5.1: Extract from interview with George, Organisation A 61

Figure 3.5.2: Extract from analytical narrative 62

Tables

Table 3: Strategies to promote quality research 37
Table 3.2: Documents included within the societal level analysis 44
Table 3.3: Example extract from analytical table 48
Table 3.4.3A Participants in the scoping phase 55
Table 3.4.3B Participants from the three LIOs 57
Table 3.5: Example extract from analytical table 63

Table 4.2.2: Characteristics of logics, Conservative Administration, 1979-1997 85
Table 4.2.4: Characteristics of logics, New Labour Administration, 1997-2010 91
Table 4.2.6: Characteristics of Logics, Coalition Administration, 2010-2015 102
Table 4.3: Summary of the belief systems and associated practices within national documents, 1979-2015 108

Table 5: Summary of Societal Messages, Weakened Field Constraints and Practice Implications 112
Table 5.2.1: Changing field structures as weakening constraints 118
Table 5.2.2: Dimensions of alternative ways of working and communicating 122
Table 5.2.3: Changes described as causing disruption at the field level 125
Table 5.2.4: Dimensions of inter-organisational collaborations 129
Table 5.2.5: New field structures 131
Table 5.2.6: Dimensions of demonstrating and promoting the quality of the work of the voluntary sector 134

Table 6.2: Logics Summary Table 144
Table 6.3.1: Identity work based on normative identity cues 147
Table 6.3.21: Comparing the permanence of the voluntary sector with the impermanence of government 154
Table 6.3.22: Discursively demonstrating the distance between the voluntary sector and the state 157
Table 6.3.23: Voluntary sector actors critiquing the State 159
Table 6.3.3: Dimensions of identity work wherein actors are distancing from market rationality logic 162
Table 7.1.1: Summary of institutional logics constructed and conveyed through national documents 171
Table 7.1.2: Ideational shift within transitional documents 175
Table 7.1.3: Typology of weakened field constraints 179

1. INTRODUCTION

This thesis extends current understanding of the relationship[1] between the state and the voluntary sector. In particular, the puzzle at the heart of this study is the interplay between the ideas used at a national level, and the ways in which actors within local infrastructure organisations[2] appropriate these ideas in order to either align with, or resist, the ideas conveyed by the central state. The thesis documents the research journey through which the interplay of ideas at the two levels was explored.

The study was borne out of an interest in how voluntary organisations were engaging with the overarching policy debates regarding the role of the sector vis-a-vis the state. At the point of starting this study, the New Labour government was into its third and final administration, and a multitude of national documents had been, and were being, produced which dealt directly with the role of the voluntary sector. Witnessing the birth of the Coalition administration in 2010, the shift in policy ideas regarding the sector encouraged me to take a broader look at national policy relating to the voluntary sector's role. The study therefore became one which simultaneously considered the language of ideas within national documents authored primarily by the state, as well as how individuals within voluntary organisations were engaging with these ideas. The methodology therefore became two-fold, exploring ideas at the national and the local levels, and looking for points of contact and departure, or 'impact', between the two.

This thesis is important because it addresses the lack of extant work within voluntary sector scholarship which empirically explores the interaction between government ideas and the lived experience of organisational actors. Many examinations of policy exist, but the critical missing piece of the puzzle is the role that the voluntary sector might be playing in its own fate. The study therefore addresses the omission of voluntary sector actor agency within much voluntary sector literature, because it

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[1] Although the singular 'relationship' is used here, it is acknowledged that a multiplicity of relationships between voluntary sector and state actors exist.

[2] Local infrastructure organisations are discussed more fully later in this chapter (p14) and in the Methodology but simply put, they can be defined as voluntary organisations that work at the interface between the statutory sector and the wider voluntary sector at the local level (Macmillan, 2011).

directly explores how actors are treating ideas, whether by their acceptance or resistance.

As debates surrounding welfare provision continue amidst rising concern about a failing welfare system in the U.K. (Taylor-Gooby. 2012), the question of what role the voluntary sector can or should play within society remains. Therefore, a study which explores how voluntary sector actors themselves view the sector's role, and the way in which actors work to promote their ideas within this context, is timely and important. It is particularly important because this understanding can impact on how voluntary organisations and their services are judged.

This introductory chapter provides the background to the study, locating the work within the context of voluntary sector scholarship, and in particular outlining how this study responds to gaps in extant work. The chapter then unpacks key concepts, exploring issues surrounding the voluntary sector grouping and labelling, and how I am defining the voluntary sector for the purposes of this study. The chapter then introduces the central research questions to which this work responds, and the theoretical concepts which have provided a framework for this study. The chapter concludes with an overview of the study's methodology and an outline of the thesis structure.

1.1 Background

The voluntary sector[3] has been the subject of extensive academic attention, and the issue of the relationship between the voluntary sector and the state[4] is central to these debates, with the suggestion that the nature of this relationship "has been at the forefront of thinking on and by voluntary organizations for a century" (Lewis, 1999: 256). Despite this extensive attention, too often, the voluntary sector is presented within extant literature as the more passive party in this relationship, powerless and responding to changes imposed by the state (Acheson, 2014). This tendency within voluntary sector scholarship to cast voluntary sector actors and organisations as

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[3] The label 'voluntary sector' is used within this study, but the definitional debates surrounding this and other terms is explored on pages 5-8

[4] The term 'the state' is discussed on page 8 of this Introductory chapter

passive is not without critique. An example of such critique would be the suggestion that, in their study of a governmentality agenda, Carmel and Harlock (2008) are too reductionist in their approach, as they ignore the role the voluntary sector might be playing (Alcock and Kendall, 2011).

Yet such critiques, and the challenge they set for voluntary sector studies, have failed to prompt an emergence of studies which *do* consider the voluntary sector, and the organisations and actors working within the voluntary sector, as active agents. This problem, Acheson (2014) suggests, is theoretical in nature, partly due to the prevalence of an economic paradigm framing much extant voluntary sector research. Such a framework presents change as an exogenous force, to which voluntary sector actors are forced to respond. It is important to recognise the problems associated with presenting this grouping of organisations as passive within its context, or as 'cultural dopes' subject to the work of more powerful actors such as the state (Hirsch and Lounsbury, 1997). Alongside this, it is also important to be aware of the alternative extreme, which would cast actors within voluntary organisations as heroic, and able to act entirely independently of their context, unconstrained by their environment (Hwang and Colyvass, 2011).

Considering the tendency within much voluntary sector scholarship to treat voluntary organisations as responsive, or passive within their broader contexts, herein lays a significant gap in voluntary sector research: how can we begin to understand the work of actors within voluntary sector organisations as something other than responsive? How can scholars attempt to study the interface between the state and individual voluntary organisations, or the actors within these organisations? Acheson (2014) suggests that we start to explore how dominant ideas or narratives are:

> *"reinforced, confirmed, scaled down through beliefs, choices, everyday actions of social actors such that civil society becomes a site for translating narratives into practices"* (Acheson, 2014: 294)

In a similar vein, several scholars (see for example Coule & Patmore, 2013; Zilber 2002) have started to call for the exploration of the processes by which voluntary sector actors appropriate the dominant narratives presented to them, and translate such narratives into micro processes or practices. It has been suggested that such an

exploration will help to develop understanding of, "the extent to which these micro processes are themselves active contributors to, and perhaps an essential part of, larger processes of change" (Acheson, 2014: 295). This thesis responds to such call for scholars to explore how actors at the local or micro level engage and rework ideas which are presented at the societal level. In developing a better understanding of how the interplay between societal-level ideas and individual actors might be playing-out, this thesis can support subsequent studies of the ways in which micro level actors from within the voluntary sector may, in-turn, be effecting change. In other words, if current voluntary sector scholarship presents the sector as responsive, we need to consider how this assumption can be empirically explored and challenged. This thesis offers one way of exploring this relationship via a study of ideas.

Much is written about ideas, and one important aspect of ideational scholarship sees ideas as narratives which shape our understandings (Schmidt, 2008). Within institutional theory, scholars have explored the concept of 'institutional messages' – which are communications which establish meaning systems and are, "created in an inter-organizational environment that transcend particular settings, interactants and organizations" (Lammers, 2011: 19) – which is thus considered a vehicle for the communication of ideas. Strands of scholarship within political science and institutional theory which consider ideas (see Baumgartner, 2012; Hall, 1993; Schmidt, 2008) often do so in terms of how ideas become powerful narratives, how ideas enter government policy, and how such ideas change over time. These bodies of literature all consider ideas within the realm of the state and the policy community. Therefore once again, we are faced with the issue of a lack of extant work which explores what happens at the interface within which ideas are received and used or appropriated at the micro level of individuals within organisations.

It is important to note that scholars (Acheson, 2014; Dacin et al, 2002) suggest that there is a lack of studies which consider how micro level processes (the practices of voluntary sector actors, for example) might be contributing ideas back to the process of change. This would be an appropriate critique of the ideational literatures cited above, in that the active agents within these literatures are the policy-making 'community' alone. This thesis explores an important aspect of this critique: what are

the processes through which voluntary sector actors might appropriate the ideas presented to them through institutional messages and to what end?

The study of ideas conveyed through institutional messages thus offers a useful avenue into exploring the processes taking place at the level of individual actors within voluntary organisations, as well as processes at the societal level. In exploring the narratives of individual actors (employed staff and trustees) from within local infrastructure organisations, this study seeks to understand the processes by which these actors are engaging with the ideas we see presented within societal level institutional messages: are ideas rejected, adopted or appropriated within individual narratives? The aim of this study is to explore these micro-level processes, and in so doing, consider the extent to which an ideational study can illuminate active work taking place at the micro level within individual voluntary organisations, positioning voluntary sector actors as "situated agents rather than reified institutions and organisations" (Acheson, 2014: 295).

Having explained why this study was important to pursue, and having located this thesis within its specific context, it is necessary to now provide the background to the academic study of voluntary organisations, and explore the key concepts used within the thesis.

1.2 Key concepts and understandings: the voluntary sector

When presenting a study which focuses on voluntary sector organisations, it is important within this introductory chapter to consider how the voluntary sector has been characterised within extant literature, and how this study understands and uses concepts regarding these organisations. This includes a discussion about the contested nature of a 'sector', as well as an outline of the varying labels which are used to describe this broad grouping of organisations (and activity) and why such a range of labels exists.

Through historical and current debates it becomes clear that the concept of a voluntary sector is a problematic grouping (see for example 6 and Leat, 1997). A key debate which is ongoing in extant literature is how a voluntary sector is defined. It has been suggested that different definitions are associated with the varying contexts

within which the sector is working (Alcock and Kendall, 2011), but the nuances of the debates are important to highlight, and briefly discuss, because this contestation is an important aspect of the context of this area of work.

Certain scholars have questioned the very notion of a voluntary sector, suggesting that this concept had been constructed by committees tasked with reviewing voluntary activity - Wolfenden in 1978 and Deakin in 1996 - alongside key figures within both the government and voluntary organisations (6 and Leat, 1997). This is a particularly interesting contextual debate for this study, as the empirical work on which this study is built explores how documents and individual actors define and position the voluntary sector. Another debate explores the diversity of the organisations which are considered part of this sector, suggesting that a single definition, and the homogeneity a single definition implies, would inevitably exclude some organisations (Halfpenny and Reid, 2002). A slightly different angle on this debate is that all organisations behave differently, even within similar contexts (for example organisations operating within health and social care context) and therefore to suggest that there is a degree of unity would be misleading (Johansson, 2003).

Coming out of these overarching debates, which are concerned with whether a sector exists and why, is the notion that there are multiple labels used when referring to this grouping of organisations (and activity), including voluntary sector (Kendall and Knapp, 1996), voluntary and community sector (Blackmore, 2004) and third sector (Kendall, 2000). There are subtle differences noted between different labels and the groups they intend to include (whether a label encompasses social enterprise, for example), and such definitional debates are arguably more useful when interrogating differences within the sector. Certain contexts prefer a non-sector label, referring to 'voluntary action' or 'civil society organisations' (Office of Civil Society, 2010).

A related debate was sparked by Kendall (2009) through his observation of an emerging policy environment – labelled by Kendall as a 'hyperactive horizontal policy environment' – which suggested that the voluntary sector had become a policy subject in its own right. This has seen the emergence of a strand of *voluntary sector policy*, which stands in contrast to other European countries, within which voluntary sector activity has not attracted this kind of 'horizontal' policy area, but rather remains

integrated into existing 'vertical' policy fields such as health and welfare. Within this, Kendall (2009) observed the shifting language used to discuss the sector, and its role.

These ongoing debates are an important contextual factor because they all touch on how the voluntary sector is positioned by the state, and why. This question of how and why particular definitions are used is important, particularly within the context of a study into relationships between sector actors. It is important to keep the contested nature of the sector in clear focus, as an important aspect of this study is how the identity of the sector is positioned, both within individual actor narratives, as well as within national documents authored by state actors.

Despite these ongoing debates and dilemmas concerning the definition of a voluntary sector, it is necessary and important for a study of the state-voluntary sector relationship to be clear about how the voluntary sector is being defined for the purposes of this study. I am taking a broad definition, which draws to a degree on criteria used within the John Hopkins 'Comparative Nonprofit Sector Project', launched in 1990. I am defining the voluntary sector as comprising organisations that are non-profit-making, self-governing entities which are independent of both government and the private sector, and have a meaningful degree of voluntarism (Kendall and Knapp, 1996). Although this is the broad definition which is applied within this study, it is important to note that applying such a definition is not an attempt to draw a solid boundary around the fixed grouping of organisations of interest, but rather clarify the kind of characteristics being referred to when using the label 'voluntary sector'. Further discussions of the issues surrounding the definition of the voluntary sector are contained within Chapter 2.

The nature of the positioning of the voluntary sector within national documents may be fluid, changing over time and across different documents (Kendall, 2011). However, the persistent inclusion of such a grouping at the national level frames the first central puzzle to be explored within this thesis. The idea that national documents might play a part in shaping understandings of the sector - i.e. not only sector boundaries, but what the voluntary sector is, and the features of the sector's role identity - is the puzzle seeking to be explored.

The contested nature of the voluntary sector population is an important starting point for any discussion which views the voluntary sector through an institutional lens. Whether the grouping of sometimes disparate organisations into a sector is considered an act of power and control by the state (6 and Leat, 1997), or indeed part of an institutionalised myth (Beland, 2009) which enables organisations to draw upon normative attributes and values, this is an institutional field which demands more interrogation. Definition is particularly important within this study, because how the voluntary sector is defined by others (such as the state) is central to the role identity assigned to the sector, and articulated within the national documents to be explored. When an entity (or grouping, such as the voluntary sector) is defined, that definition encapsulates identity as well as providing cues about what an audience can expect from such organisations or groupings (Glynn and Navis, 2013).

The complexities surrounding how we define the voluntary sector raises one set of questions which need to be highlighted and discussed. However, this study does not seek to advance definitional debates, but rather sets out to explore how the state positions the voluntary sector within national documents. Leading on from this, a study which is positioned as one which explores the relationship between the voluntary sector and the state, raises the subsequent question about what is meant by 'the state'.

The term 'state' is used within this study whilst acknowledging that the term is problematic, and therefore demands definition and explanation. A study of the relationship between the voluntary sector and the state could be approached from numerous different angles, because there are multiple relationships which are playing-out between statutory and voluntary sector actors. Within this study, the term 'state' is used in order to refer to the government at the national level. Within the first empirical chapter, the state is referred to as the author of documents under consideration. As with the term 'voluntary sector', it is important to acknowledge the imperfect nature of a single label when referring to something as complex and multi-faceted as the state. However, for the purposes of this thesis, a single label has been adopted due to the study's focus on the national documents of the central state.

The final aspect of the study to consider in terms of how terminology is being used is the 'relationship' between the state and the voluntary sector. Voluntary sector organisations are engaged in multiple relationships. Many of these relationships are with statutory organisations including the central state, particularly through the impact of policy and the regulatory/legislative environment; regulators (for example the Charity Commission); local statutory organisations such as Local Authorities, and health structure such as Clinical Commissioning Groups (CCGs). Voluntary organisations might also be engaged in relationships with private sector organisations and partnerships, and relationships with service users, volunteers, stakeholders and other beneficiaries. Organisations are also engaged in a complex series of relationships with other voluntary sector organisations. In order to capture the complex web of interrelationships which exist, this study uses the concept of the organisational field[5] – a site wherein organisations interact within a recognised area of institutional life (DiMaggio and Powell, 1991; Scott, 1995) – in order to understand the site within which these relationships play out.

The relationship between the state and the voluntary sector is a subject which has attracted, and continues to attract, academic attention. Chapter 2 provides an exploration of the relationship between the state and the sector as it has emerged and evolved over time, in particular focusing on how the voluntary sector has emerged as an object of state policy.

Having considered the key concepts used within this study, this chapter will now present the three central research questions which are at the heart of this thesis.

1.3 Research Questions and Aims

A central aim of this research project is to bridge the empirical gap which has been identified between work focusing on the national or societal context, and work focusing on the micro, or organisational context. The research questions which guided this research articulate this bridging aim:

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[5] The concept of the organisational field is explored further in Chapter 5

1. What are the central ideas regarding the relationship between the state and the voluntary sector, and their respective roles, which are constructed within institutional messages over time?
2. What do LIO actors suggest are the field-level implications associated with shifts in ideas regarding the role of the sector, the state and the state-sector relationship?
3. What rhetorical strategies do LIO actors adopt as they engage in debates over ideas about the role of the sector, the state and the state-sector relationship?

The first question focuses on establishing the national picture over time through a discursive analysis of national policy texts produced between 1978 and 2012. The second and third questions explore the context of local infrastructure organisations (LIOs), through analysis of actor narratives.

1.4 Theoretical overview

This study adopts an institutional lens, and draws in particular on a number of key concepts from institutional theory, which enables a better understanding of the interplay of ideas at the societal level (national government documents), and the narratives of individual local infrastructure organisational (LIO) actors working at the local level. This section provides a theoretical overview, which will locate the theoretical concepts applied in subsequent chapters within their context, and clarify why such concepts are useful for this study.

The concept of the institution which chimed with this study was the following explanation provided by Lawrence and Suddaby:

"there are enduring elements in social life – institutions – that have a profound effect on the thoughts, feelings and behaviour of individual and collective actors" (Lawrence and Suddaby, 2006: 216).

This thesis takes the central state to be an institution, and the social policy contexts within which voluntary organisations engage with the state as established areas of institutional life. In intuitionalist terms, 'mature fields'. As well as institutional theory

having a long history within the subjects of economics, political science, and sociology (Scott, 2008), it has also informed the analyses of organisations, and it is this field of institutional theory which has provided key concepts through which we can better understand the interrelationship being explored within this thesis.

A central tenet of institutional theory during the 1970s was that organisations, their structures and practices, were in part the result of institutional forces stemming from their environment (Powell, 2007). Within this wave of theorizing, studies by Meyer and Rowan (1977) and Zucker (1977) explored the idea of organisations seeking legitimacy through adapting to their environments. This sense of organisations within a context, and the interplay between the two, is the theoretical starting point for this thesis.

With the emergence of the work of DiMaggio and Powell (1983) on isomorphism, which considers how organisations become more alike as a result of pressures that can be normative (organisations seeking legitimacy, for example through professionalising), mimetic (organisations modelling themselves on other organisations) and coercive (formal/informal pressure on organisations) in nature (DiMaggio and Powell, 1991), scholars started to better understand how organisations, as well as responding and adapting to their environments, adapted to resemble other organisations. Whereas preceding literature sought to demonstrate how organisations varied from one another, this key piece of work in 1983 sought to challenge this view, through their suggestion that in fact, organisations within fields become more alike over time in the pursuit of legitimacy (DiMaggio and Powell, 1991).

The work of Dimaggio and Powell in 1983 (and subsequently in 1991) generated numerous empirical studies (Powell, 2007), however these significant developments within institutional theory rendered organisations themselves as *responsive* entities, lacking agency (Lawrence and Suddaby, 2006). Indeed, institutions have commonly been considered a source of stability (March and Olsen, 1989; North, 1990) with organisations adapting and responding, to the institutional environment. These aspects of institutional theory have faced strong critique regarding the focus on organisations *responding* to their environment as opposed to allowing consideration of

a more *active, shaping* role. If only responsive, how can we explain the ability of actors to influence the institutional environment?

This question speaks to the long standing issue of embedded agency, which considers the problem of how actors can be at once embedded within an institutional context whilst also being able to act upon that context (Holm, 1995; Seo and Creed, 2002). Whilst this issue is receiving some attention from organisational scholars (Fligstein, 2001; Hwang and Colyvass, 2011) one aspect of this debate remains unresolved: how we can explore the link between institutions at the societal level and actions or processes which are happening at the micro, organisational level.

One theoretical tool which starts to enable this level of exploration is the concept of institutional logics, understood to be the belief systems and associated practices which organise and guide behaviour (Thornton and Ocasio, 2008). Considering institutional logics enabled a bridging of the societal and micro levels, in that logics are a feature of the societal level that guides behaviour (practices) of individuals and organisations. Using this theoretical concept enabled an analysis of national government documents to surface the discursive features of documents which supported overarching belief systems of a particular era. When considering the narratives of individual actors, the concept of institutional work became useful.

Institutional work can be defined as 'intelligent, situated action' (Lawrence and Suddaby, 2006: 219) and enables a concern for the effects of actors on institutions (Lawrence et al, 211). In particular, identity work[6], as a form of institutional work, became central to this study, as the analysis of actor accounts enabled me to explore different manifestations of identity work, and what role such work might be playing. These concepts, which are explored in greater detail in subsequent chapters, thus provide the theoretical underpinnings of this thesis, as it seeks to explore the phenomenon of local actors engaging with, and reworking, institutional messages.

[6] Identity work is considered in more depth in Chapter 6

1.5 Methodological overview

This study was designed in order to explore ideas through a discursive analysis of national government documents and actor accounts. A discursive methodology involved designing the study in order to focus on language-use, and drew on techniques from within discourse analysis (Fairclough, 2003; van Dijk, 1997). This discursive methodology was applied to both the societal level of national documents, and the organisational level of narratives of individual actors that worked and volunteered within LIOs. The study was designed in order to explore the research questions presented above (1.3), and involved two strands of empirical work. These strands will be explored in detail within Chapter 3, but by way of a summary, the first strand of empirical work explored the societal level. This involved a discursive analysis of a series of national documents, and surfaced the ideas being constructed and conveyed by the authors within governmental departments through institutional messages.

The choice of the documents analysed within this study is discussed more in both the Methodology (Chapter 3) and the first empirical chapter (Chapter 4). However, it is useful within this framing chapter to explain that, although there are numerous studies which explore aspects of national documents pertaining to the voluntary sector (see for example Alcock, 2010; Carmel and Harlock, 2008; Kendall, 2009; Lewis, 1995; 1999), for the purposes of this study, it was not considered sufficient to extrapolate ideas from across extant studies. A study into the institutional logics constructed and conveyed within national documents enables the study to bridge societal and micro level analyses, because it considers how documents might convey beliefs about the roles of the state and the voluntary sector, and the practices associated with these beliefs. This level of analysis made it possible to consider how actors relate to such beliefs and associated practices within their individual accounts. Twelve documents in total were analysed, and this represented nine government documents and three documents considered 'transition documents' produced by independent committees and opposition parties.

The empirical work at the organisational, or micro-level, was designed in order to explore the accounts of organisational actors working within local infrastructure

organisations. This kind of organisation was considered appropriate for this study, as they are organisations which work at the interface between statutory sector organisations – Local Authorities, Clinical Commissioning Groups – and the wider voluntary sector at the local level (Macmillan, 2011). This also means that they perform a bridging role between organisations within the institutional field of interest. Such a position makes these organisations, and those working and volunteering within them, important contexts through which to explore the relationship between the voluntary sector and the state. The sampling and selection of these organisations is explored further within Chapter 3.

This phase of empirical work included 31 in-depth, qualitative interviews; nine scoping interviews and 22 interviews within the central research phase, which collectively produced 489 pages of typed transcripts. The way in which narratives prioritised aspects of voluntary sector, or organisational identity, or the "explanations and justifications for the fundamental elements of their collective, institutionalized existence" (Boyce, 1996: 5) was of particular interest. This meant that the interview schedules were structured in order to ask the actors open questions relating to the organisation, its history and relationships with the state and other agencies. The questions were designed in order to encourage the actors to engage in detailed narratives. The micro level study with organisational actors was explored alongside the study of national documents. In order to explore the points of connection and departure between the two levels, of particular interest was the way in which actors may have appropriated (or ignored or rejected) the ideas surfaced within national documents.

1.6 Structure of the thesis

It is important to explain and justify my particular approach to writing this thesis, as it does not take a traditional form which would most likely follow the introduction with the literature chapter(s), then present the methodology followed by the empirical material. The decision not to follow such a structure, however, was a conscious and deliberate one, guided by my approach to the research process. The research process was iterative, and was very much led by the data as it was gathered and analysed. Although a broad range of reading informed the early stages of the project, as soon as the first phase of the research was underway, the data being gathered and the ongoing analysis that I was undertaking, guided the areas of literature subsequently engaged with. The iterative process meant that the data analysis and theoretical engagement continually informed one another.

The thesis is therefore faithful to the chronology of the research process. It did not appear coherent to try to extract the literatures from the discussion and present them before the empirical work, as they were so closely entwined throughout the research process. Instead, the structure of the thesis reflects the project's iterative approach, with literature being presented to theoretically sensitise the data within the three central chapters: Chapters 4, 5 and 6. These chapters are not simply presenting the empirical work, therefore, but rather embed the research within the literatures and theoretical concepts which helped to illuminate the data and the discussions surrounding the implications for extant literature. For the same reason, there is not a separate discussion chapter, as the discussion surrounding the implications of the data are embedded within the three central chapters.

Within the empirical chapter which presents the analysis of national documents (Chapter 4), the argument for using the concepts of institutional logics and institutional messages is developed along with an analysis of the current state of play within these streams of literature. Likewise, the concepts of institutional fields and field constraints frames the second empirical chapter (Chapter 5), and the concept of identity work is introduced in the third and final empirical chapter (Chapter 6). Due to this approach, the thesis does not present separate chapters dealing with the theoretical underpinnings for this thesis.

Despite this integration, it was considered important to provide a contextual chapter, which explores the literatures surrounding the evolution of the state-sector relationship and how the voluntary sector emerged as an object of state policy. Chapter 2, therefore, presents this summary, framing the subsequent substantive chapters. Chapter 3 then provides a detailed description of the methodology adopted within this study, and the individual methods used within the two aspects of empirical work at the societal and organisational level.

Chapter 4 presents the empirical data arising from the discursive analysis of national documents spanning political eras from 1978 to 2012. This chapter explores the institutional messages constructed through the documents, and explores the overarching institutional logics constructed and conveyed within such messages. Chapter 5 turns to explore the micro level, and considers how actor narratives provide accounts of the shifting organisational field. This chapter uses the empirical analysis to demonstrate the link between shifting logics and accounts of weakening field constraints. Chapter 6 presents a discussion of the final aspect of the empirical work underpinning this thesis, which is the analysis of the ways in which actor accounts display an appropriation of the role-identity cues of institutional logics surfaced within Chapter 4. This chapter discusses the devices used by actors as they narrate their navigation of the institutional field. Chapter 7 concludes the thesis, through its consideration of the central ways in which this thesis offers contributions to knowledge.

2. THE VOLUNTARY SECTOR AS AN OBJECT OF POLICY

This chapter considers how the relationship between the state and the voluntary sector has been conceived and understood over time, and how this has involved the emergence of the voluntary sector as *an object* of policy. Within this chapter, I reflect on where this policy focus has come from and how it continues to develop. This discussion is important because it provides the context for how the empirical work contained within this study contributes to, and extends, ongoing debates about the how the relationship is discursively presented.

As well as setting-out what this chapter aims to achieve, it is also important to clarify what it does not try to do. The chapter has a specific aim of tracing and discussing how the voluntary sector emerged within a policy context. This will involve a discussion of key points in the history of the English context in order to explain how shifts may have occurred. However, this will not be an exhaustive account of the history of voluntary action within England. This undertaking would be far beyond the scope of this thesis, but also divert from the specific task of contextualising and explaining where contemporary debates are located.

A large proportion of the literature which forms the basis of this study is embedded within the three empirical chapters (see the Introduction, Section 1.6 for a full justification of this thesis structure) and this includes the institutional literature, which provides the conceptual framework for the study. However, the literature exploring how the changes and continuities in how the voluntary sector's relationship with the state has been discursively presented frames the arguments which I make throughout this thesis, and it is therefore appropriate to consider this literature at this early point.

This will be a broadly chronological review of the extant literature which helps to explain how the relationship has evolved and shifted. The starting point for this review has been identified as a number of extant works suggest that the 16th Century is a point which marks the rise of voluntary action outside of the auspices of religious institutions (Deakin, 2001), and can thus be identified as an area of work or action in its own right. This era has been labelled 'pre-policy' because this separates it from the era of policy attention which focuses on the voluntary sector.

2.1 The State-Voluntary Sector relationship 'pre-policy'

Within historical discussions of the voluntary sector, it is more coherent to consider forms of 'voluntary action', as opposed to applying a sectoral label to an era within which such groupings are less meaningful. The term 'voluntary sector' emerges within discussions of the 'policy' era, and will be further explained therein.

Many contemporary accounts of the history of voluntary action and its relationship with the state start at around the 16th Century, focusing on the dissolution of monasteries, the resulting loss of a form of voluntary activity, and the steady rise of state interventions from this period onwards (Davis Smith, 1995; Kendall and Knapp, 1996). Within such accounts, it is suggested that core social services such as health provision to this point had been provided under the auspices of established religious institutions (Davis Smith, 1995). Although voluntary action within this era has been discussed in terms of its independence from the state, the evolution of the relationship between the two sectors, and how it came to be characterised in later documents, was influenced by significant developments in statutory legislation which impacted in one way or another on forms of voluntary action. Despite the growth in statutory activity in this broad field, this steady increase in what we would now recognise as statutory activity happened alongside a formalising of philanthropy (Milbourne, 2013), and voluntary action within and beyond the church continued to grow in size.

It has been suggested that such historical accounts of voluntary action tend to focus on one form of voluntary action – philanthropy - at the expense of a second form – mutual aid (Rochester, 2013). Scholars such as Rochester (2013) describe the emergence of modes of self-help, in the form of craft guilds and livery companies between the 5th and 15th Centuries, highlighting the significance of these forms of voluntary activity in terms of collective action to enabling workers to support themselves outside of the auspices of any statutory context. Forms of mutual aid, such as Friendly Societies, continued to be an important part of the landscape within Britain, and this continued, largely intact, for the following 250 years (Deakin, 2001). This division within accounts about the history of voluntary action, and its relationship with the state, illuminates a definitional thorn in the side of voluntary action, which

still has resonance within current definitional arguments. This will be returned to a little later in this chapter, with considerations of the emergence of social enterprise as an acknowledged grouping within the broad umbrella of the voluntary sector, and the impact this has had on sectoral boundaries.

The dissolution of the monasteries in the 16th Century left significant gaps in the relief of poverty, and this marks a point at which there is a shift in how the relationship between the state and voluntary action is understood. In-part to meet the growing needs of the poor, and to manage the public response, the 'Charitable Trust' was established as a legal form within two Acts of Parliament in 1572 and 1601 (Rochester, 2013). The second of these set out the basic definition of charitable activity (Davis Smith, 1995). The emergence of this structured form of charity was an attempt to prevent activities conducted in the name of charity which were considered fraudulent (Kendall and Knapp, 1996). This first attempt on the part of the state to define charitable purposes, alongside the attempt to outlaw indiscriminate giving, marks an important point in the evolution of the relationship between voluntary action and the state, as this starts to shape how voluntary activities are understood and accounted for by Government (Davis Smith, 1995).

Towards the end of the 18th Century, a number of important social movements were starting to emerge, which mark another developmental phase in how the relationship between voluntary action and the state was understood. Movements such as the anti-slavery movement emerged, which sought to persuade the state, influence change and promote social justice (Rochester, 2013). Such action-focused movements were a growing feature of society, and they are illustrative of the way in which such examples of voluntary action were exerting pressure on state institutions. It was during this era that the associational charity really grew in significance as a second form of voluntary action (Davis Smith, 1995).

A key turning point in how the state-voluntary sector relationship was understood occurred in 1834, with the passing into law of the Poor Law Amendment Act. This Act effectively created two classes of poor: the deserving and the undeserving, thus defining the 'deserving' who could receive charitable donations, and the 'undeserving', who faced the Work House (Ridley-Duff and Bull, 2011). This Act shifted how 'the

poor' were discursively presented, and thus understood, and subsequently how the role of voluntary action (and how it related to the role of the state) within this era was positioned.

The withdrawal of aspects of state support was one outcome of the Poor Law Amendment Act in 1834, and this in turn led to increased levels of need. Although there was a growth of formal charity within this era, there was an emphasis on the 'deserving poor'. This gap in state activity and formal charity activity led to the growth in the number of Friendly Societies during this period. Although the roots of friendly societies can be traced as far back as mediaeval times (Weinbren and James, 2005), new legislation in the form of the Friendly Societies Act passed in 1834 enabled Friendly Societies to be established as self-governing institutions (Ridley-Duff and Bull, 2011). By the early 19th century, Friendly Societies had become one of "the most important forms of working class voluntary association" (Harris, 2010: 26).

These forms of state legislation demonstrate how the state was attempting to position its role, but also the role of charity during this era. Despite these attempts, it has been suggested that criticism of both the state and formal charity continued (Davis Smith, 1995). The needs of the growing industrial population were not being met, and there were calls for still greater coordination of voluntary activity by the state, with particular reference to the ragged schools and voluntary hospital movement (Davis Smith, 1995). Voluntary action in areas other than health and education were not brought within state control at this time (Taylor, 1995). Alongside such calls for greater state coordination were growing criticisms of both state, and formal, organised charity, in terms of the significant gaps left by both as they focused their support on the 'deserving poor'. It has been suggested that certain liberals and socialists, and established trade unions, started leaning more towards cooperative thinking, considering different and more cooperative principles in terms of how business was conducted (Ridley-Duff and Bull, 2011).

This shift marks an important juncture in the evolution of voluntary action, in terms of how we characterise voluntary activity which centres on the trustee-beneficiary model, and voluntary activity which centres on cooperative principles. Although the contemporary debates, which focus on this division within the voluntary sector, are

not pursued to any great extent within this empirical study, it is clearly an important aspect of the development of voluntary action and its relationship with the state. Understanding such debates does help to illuminate contemporary discussions in terms of the definition of the voluntary sector, but also more nuanced debates about preferred approaches to economic and social reform (Ridley-Duff and Bull, 2011). As this study explores how national documents and individual actors articulate the sector and its identity, this aspect of the evolving nature of voluntary action is an important feature.

From this point onwards, scholars describe the way in which debates flared up regarding the relationship between the state and the voluntary sector (Cairns et al, 2005). With the relationship from the 16th Century onwards having been described in terms of separate spheres, or parallel bars, Beatrice Webb and George Lansbury put forth an alternative argument. In the Minority Report of the Royal Commission on the Poor Laws (1909), they recommended that the relationship should in fact be understood as resembling an extension ladder, with voluntary action complementing and extending core state provision (Davis Smith, 1995; Taylor, 1994).

Although this argument was widely challenged when first published, it marked a shift in the debates surrounding the relationship between the state and voluntary action, as state-led activities grew, so did concerns that voluntary action would be displaced. This era can be characterised in terms of the growing and more powerful position of the state, often characterised in contemporary accounts as competing with the existing, institutionalised voluntary activity leading up to this era. However, there remained widespread gaps in what we may now understand as a social safety net, illustrated by the ad-hoc coverage of Friendly Societies, and the categorising of the undeserving poor.

2.2.1 The emergence of a 'formal' relationship: Charity Organising Society and Councils of Social Service

Against the backdrop of the punitive era of the Poor Law, concerns about the vast but uneven expansion of various forms of voluntary action within the 19th Century led to the creation of the Charity Organisation Society (COS) in 1869 (Rochester, 2013). The

role of the COS was to manage and rationalise this growth in activity, and it worked closely with state institutions in this endeavour.

Although ultimately this organisation failed in its attempts (Rochester, 2013), it is a significant development in the context of this thesis, as it paved the way for the emergence of the National Council of Social Service and ultimately the creation of local Councils for Social Service (later to become Councils for Voluntary Service, the umbrella within which the three organisations in this study sit).

The National Council of Social Service (NCSS) was formed in 1919, and its aim was,

> *To promote the systematic organisation of voluntary work both locally and nationally, to encourage the formation of mutually supportive links between the statutory and voluntary sectors and to provide information about legislative developments* (Harris, 2010: 32)

The development of the NCSS took place within the context of shifting opinions about both the role of the voluntary sector, and the role of the state. As state responsibility was growing in the areas of health, housing and education, many were reassessing the role of voluntary action, and thus the formation of the NCSS which would support the link between the sectors (Rochester, 2013). The Poor Law Commission proposed that local areas establish Voluntary Aid Councils, which should assist cooperation between charities and the local state (Poole, 1960).

In addition to this, a campaign led by Thomas Hancock Nunn led to the development of Councils of Social Service similar to the National CSS, in localities across the country. The first Councils of Social Service (CSS) were established in Hampstead and Stepney in 1908, with Liverpool Council of Social Service establishing in the following year (Poole, 1960). Their role initially was to assess need and identify gaps in services, either encouraging organisations within the area to meet this need, or indeed stepping in itself as a temporary arrangement (Rochester, 2012).

The function of CSS shifted with the publication of the Wolfenden Committee Report (discussed in more detail on p24), as the idea of CSS, or Councils for Voluntary Service (CVS), as intermediary bodies was introduced within this report. This was a key moment of change in terms of the relationship between the state and voluntary

action, as this intermediary role assigned to CVSs represents a formalising of the relationship, and is a role which has remained. Since this time, the role of CVSs has evolved[7].

It was during the 1940s post World War II, when major welfare legislation heralded a significant shift in the relationship between the state and the voluntary sector (Lewis, 1999). This era also marks the point during which the voluntary sector started to feature within national government policy with regard to its actual or potential role in the provision of welfare services. This period following World War II therefore can be labelled 'the policy era'.

2.2 The relationship in the 'policy era'

The welfare legislation introduced in the 1940s could be regarded as marking a critical shift in the institutional landscape of Britain, as the state took a dominant role within the planning and delivery of core welfare services surrounding income and health (Cairns et al, 2007; Kendall, 2009; Milbourne, 2013; Taylor and Lansley, 1992). At this point, it has been argued that the role of voluntary action was institutionalised as subordinate to the state (Kendall and Knapp, 1996). When considering how the relationship between the state and voluntary action is discursively presented, statutory legislation played its part in positioning the two sectors during this era, and the statutory sector had assumed a position of greater responsibility and power, as compared with voluntary organisations, who were characterised as supporting those who had slipped through the net of welfare provision (Lewis, 1999).

As well as the reduction in demand for certain voluntary services, due to developments such as the National Health Service, further shifts in statutory legislation impacted on role of voluntary action. One example of this would be the national health insurance scheme abolishing approved societies, thus severely restricting the role of Friendly Societies, which had played an important role in administering health insurance up until this time (Harris, 2010). Despite the decline of Friendly Societies, it has been noted that the mutual aid tradition remains important in much present day

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[7] Local CVS went on the play a significant role within the New Labour administration, as these administrations focused on partnership between the state and the voluntary sector – discussed further in Chapter 4 of this thesis

voluntary sector activity, such as self-help groups and single issue groups (Rochester, 2013).

Scholars such as Harris et al (2001) and Cairns et al (2005) provide useful analyses of the impact of policy change through to the late 1970s, as state services continued to expand. Throughout this period, the discursive presentation of the idea of the powerful, service-providing state continued to dominate, as welfare services were planned and delivered centrally by the state (Coule and Patmore, 2013), with the voluntary organisations delivering additional or peripheral services. However, scholars have noted that from the 1940s through to the 1970s, grassroots activity in fact flourished (Taylor and Lansley, 1992).

Within the contexts of this study, a key shift in the discursive landscape occurred with the publication of the Wolfenden Committee Report (1978). Until this point, the notion of a voluntary 'sector' had not existed. It has been suggested that encapsulating the diversity of voluntary action into one single label, made it far more straightforward for the 'sector' to become an object of state policy (6 and Leat, 1997), but there are debates in extant literature about the impact of this single identity. Some suggest that it provided diverse organisations with a common identity, enabling groups to come together and be represented in different ways (Harris et al, 2001). However, some scholars have raised concerns about the discursive shift towards a 'sector', suggesting that certain groups such as housing associations, resisted such a collective identity (6 and Leat, 1997).

It was against the backdrop of the emerging 'sector' identity within the policy context that the early stages of the Conservative administration (from 1979) emerged to challenge the discursive position of the central state (Rhodes, 1994). It has been suggested that the Conservative administration of 1979 inherited from its predecessor large-scale cuts to the state welfare budget. Alongside these cuts, the encouragement of voluntary sector organisations as deliverers of public services grew apace (Lawrence, 1982).

The trend of bringing the voluntary sector into the centre of the service delivery debate has been described as a policy approach which suited the Conservative administration. The idea of 'rolling back the state' was central to the Conservative

policy agenda (Harris et al, 2001; Milbourne, 2013) and the focus on the voluntary sector (as well as private sector) as alternative provider was a useful way of supporting the reduced-state model, whilst retaining a community focus (Billis and Harris, 1992).

Considering how the voluntary sector was emerging as an object of government policy, it is interesting to note that Margaret Thatcher didn't necessarily embrace the 'sector' presentation, as was evident in her speech to the WRVS in1981 when she instead referred to the 'volunteer movement' thus focusing on the unpaid labour element of voluntary action (6 ad Leat, 1997). However, key figures from within large voluntary organisations (such as The National Council of Voluntary Service, successor organisation to NCSS) were embracing the sector identity within the larger discourse of a great role in public service delivery.

A major factor within the approach of the Conservative Administrations of this era was the extensive cuts to public sector budgets, which the government tied closely to the notion of community responsibility for welfare services (Lewis, 1999). This was essentially the idea that families and communities had an important role to play in informal welfare provision, and that the state's central, dominant role to date had pushed-out this important strand of welfare services. This is what Wolfenden referred to as the 'informal system of social helping' (Wolfenden, 1978: 22). However, some scholars have suggested (for example Crowson, 2011; Lawrence, 1982) that, particularly those in the Conservative party which were further to the 'radical right' were not interested in voluntary sector provision, just the ability to reduce the role of the state by whatever means were available to them (Lawrence, 1982). A second strand of the argument attributed to the Conservative administration was that of getting better value for money from non-state service providers (Lawrence, 1982). The Conservative administrations of the 1980s and 1990s disliked and distrusted powerful state providers (Crowson, 2011) and considered such systems bureaucracy-heavy and wasteful of resources. The focus was on efficiency and effectiveness, and competitive markets within this era were advocated as a measure of such efficiency (Cunningham and James, 2009).

Deakin (1995) considers the Conservative administrative era from 1979, during which the role (and discursive presentation) of the voluntary sector changed. The

relationship is considered from the perspective of the active state, with the focus upon the government administration's growing recognition of the role that the voluntary sector could play in delivering statutory services. This recognition, Deakin (1995) suggests formed part of the Conservative administration's privatisation model, which saw contracts and associated funding became more widely available for voluntary organisations.

One of the few studies which consider the *responses* of voluntary organisations to policy (as opposed to simply describing the potential or actual impacts of policy on organisations) is reported by Crowson (2011). This paper suggests the sector greeted the overall approach of the Conservative administrations with a mixed reception. The debates around independence and co-option into machinations of the state were not new at this time, but were revived with vigour by certain parts of the voluntary sector. Some embraced the service provision agenda more fully than others, whilst some were critical of the approach, and suspected that this growing role for sector organisations would compromise them in terms of engagement in a political agenda (Crowson, 2011). This depiction of voluntary sector organisations as receiving and reacting to policy is consistent with the dominant trend in the depiction of this relationship, where the state sets the institutional context and determines the rules of engagement with the voluntary sector.

The success of New Labour in the 1997 general election marked an important shift for the voluntary sector. The proliferation of national documents during this and subsequent New Labour administrations which took the voluntary, and then third sector, as their focus, represents a significant change in how the sector was characterised in relation to the state. Kendall (2000) has suggested that this period can be understood in terms of the state developing a 'horizontal' policy position towards the voluntary sector, whereby the sector itself became a policy focus. This, Kendall suggests, marks a shift from the previous eras whereby 'vertical' policy arrangements focusing on specific fields had dominated (Kendall, 2000: 555).

From the outset of the first New Labour administration of 1997, the relationship between the voluntary sector and the state has been described in terms of a discursive shift to focus on a third way 'vision' and associated rhetoric (Anheier, 2004), which

included the role that the voluntary sector could and indeed should play in civic renewal (Carmel and Harlock, 2008). This shift saw the combining of aspects of neo-liberalism displayed by the previous Conservative administration, with neo-communitarian ideology (Fyfe, 2005; Haugh and Kitson, 2007). Ideas carried forwards from the previous Conservative administration focused on the delivery of public services by non-state organisations, and New Labour focused on growing the role of the voluntary sector (Kelly, 2007). However, unlike the previous administration, New Labour rhetoric couched the sector's involvement in services in terms of the contribution to civic renewal and fostering social capital (Fyfe, 2005).

The continuation of a neo-liberal approach involved the idea that services could best be delivered outside of the state structure. Bringing in neo-communitarianism involved a focus, not only on the role that the voluntary should play in service delivery but also on the sector's potential for supporting civic renewal, and in particular, the fostering of social capital (Fyfe, 2005; Kelly, 2007). This is a term used to encapsulate civic and community engagement, framed by shared values and cooperation (Johnston & Percy-Smith, 2003). During this era, a sharp increase in the size of the voluntary sector has been directly linked to the sector taking an increasing number of statutory service contracts (Anheier, 2004; Lewis, 2005). Despite this growth, concerns about the equality of the relationship between the voluntary sector and the state continued, with concerns surfacing about the possibility of the sector being subsumed into the state structure, signalling a complete loss of independence (Lewis, 2005).

This period also saw the emergence of 'social enterprise' as an important feature of the discursive policy agenda relating to the voluntary sector (Teasdale, 2011). Although the terminology is a relatively recent addition to national policy within the UK, the social enterprise organisational form has its roots in the cooperative movement which was particularly significant during the industrial revolution (Sepulveda, 2014). As with the term 'voluntary sector', the term 'social enterprise' is contested and debated (Ridley-Duff and Bull, 2011). Seanor et al (2013) explore the range of narratives at play surrounding the term 'social enterprise', suggesting the dominance of a 'grand narrative' which emphasises how the efficient and reliable enterprise is well-placed to deliver services.

It has been argued that the inclusion of social enterprise within documents of the New Labour era was initially linked to particular area-based social exclusion initiatives, but subsequently became embedded as a possible solution across a range of government priorities (Teasdale, 2011), emphasising aspects of this 'grand narrative'. The normative values often ascribed to social enterprise, and embedded within such a grand narrative (i.e. business-like principles and behaviours), have been associated with the marketization of the third sector (Hogg and Baines, 2011) which have sparked debates within the sector regarding the threats to voluntary sector distinctiveness (Eikenberry and Kluver, 2004).

What is particularly significant within the context of this study is the way in which policy discourses surrounding the third sector have conflated concepts of social enterprise with concepts of charity within contemporary policy. This has had the effect of shifting normative understandings about the nature of what the voluntary sector is. The divisions which were prevalent within the 19th century (explored above) in terms of traditional charitable activity, and the cooperative movement which sought a move away from charity, are therefore ignored within such a shift in policy discourses.

One focal point of the New Labour administration's relationship with the voluntary sector was the development of the Compact, an agreement between the state and the voluntary sector on developing a new relationship between the sectors, primarily focusing on policy and fostering a partnership approach (Morison, 2000). Some in the sector welcomed this development as an indication of the sector's potential role in shaping policy and practice. Others, however, have suggested that the Compact has been a force for increasing professionalisation of the sector, and more sinister still, a potential source of co-option, coercion and control (Morison, 2000; Fyfe, 2005).

An aspect of the New Labour administration's relationship with the voluntary sector was the continuation of the previous Conservative administration's policy of contracting organisations within the voluntary sector to deliver more and more public services. New Labour couched the trend not in the rhetoric of 'rolling back the state' but rather in the language of social capital, and community cohesion. This increasing role in public service delivery meant that some organisations within the sector were

becoming more bureaucratised (Fyfe, 2005) introducing policies and procedures, in order to 'gear themselves up' to deliver public service contracts (Carmel & Harlock, 2008). Government promoted and assisted this change, through funds such as 'Futurebuilders'.

When the Conservative Party and Liberal Democrat Party formed a coalition administration following the general election in 2010, the place of an emerging policy agenda, the 'Big Society' (Cameron, 2010), was confirmed. Of particular interest to the voluntary sector was the degree to which community groups and charities featured in the Big Society rhetoric. As well as referring to 'communities', a section of the policy commitments within this emerging policy area was dedicated to 'co-ops, mutuals, charities and social enterprises' (Conservative Party, 2008). Part of the Big Society solution was the increased role for such groups to play in delivering services and supporting communities, increasingly taking on the role of the public sector. The embedding of such ideas may continue to reshape the institutional framework in terms of the kinds of activities, and identities, pursued by voluntary organisations.

Prior to being elected as part of a Coalition administration in 2010, the Conservative Party had outlined their proposals to depart from the public spending programme which had been pursued by the preceding New Labour administration (Snowdon, 2010). These proposals were subsequently realised early into the Coalition's first term in government, as the administration initiated a programme of significant fiscal contraction (Taylor-Gooby and Stoker, 2011). These policy shifts and fiscal contraction have been presented via discourses of 'austerity' (Lowndes and Pratchett, 2012) and 'deficit reduction', (Macmillan, 2011). Some suggest that this has enabled the Coalition administration to move away from any echoes of a liberal collectivist approach which may have been detected under the previous New Labour administration (Grimshaw and Rubery, 2012), and enact a stronger neo-liberal ideology, shrinking the state welfare apparatus and justifying subsequent welfare reforms (Gough, 2011). It has been suggested that this effectively further embeds market principles across the board (Kamat, 2004; Taylor-Gooby, 2012).

Local government, a key funder of the sector, has faced a disproportionately high level of funding cuts (Lowndes and Pratchett, 2012), and this in turn has led to service cuts

and job losses (Grimshaw and Rubery, 2012) in both local government and the voluntary sector. The Big Society, an intended leitmotif for this new relationship between state and sector, focused on shifts to decentralise power to communities, and reform public services, in such a way that non-state service providers are intended to deliver a higher proportion of public services than has previously been the case (Macmillan, 2013). The Big Society will be returned to within Chapter 4, as the ideas which have been used to construct the agenda are explored.

This analysis of the relationship between the state and the voluntary sector across these eras (between 1978 and 2015) reflects a problem with existing analyses in this field. Whilst recognising that this institutional shift at the national level is an important factor to explore in the changing relationship between the sectors across these eras, there is a lack of consideration for the role of the voluntary organisations themselves, and the actors working and volunteering within them. It has been suggested that current debates surrounding this relationship tend to focus on the state's intentions to 'harness' the voluntary sector (Baines et al, 2011; Macmillan, 2010), and voluntary sector scholarship commonly frames the state-sector relationship as if voluntary organisations "were injured parties being compelled to adapt to survive" (Acheson, 2014 : 293). Both such suggestions point to how the state is presented in the powerful position, with the voluntary sector cast in a position of responding to the state.

Moreover, extant studies fall short of making an empirical link between the ideas constructed and conveyed by the state within national documents and the ways in which those working and volunteering within voluntary organisations receive and work with these ideas within their own discursive strategies. For example, in his work exploring the horizontal policy environment in the UK, Kendall (2009) provides an analysis of the policy environment for voluntary sector organisations, but makes reference only to the headline responses of national infrastructure bodies, as well as focusing on a small number of "key players" (p83) within the policy context. This work does not engage empirically with how policy outlined within the study is received and responded to. The agency of voluntary organisational actors, and the work they undertake, has not been sufficiently considered within this view of the evolving relationship alongside this societal-view of the exogenous impacts of policy developments.

2.3 Conclusion

This chapter has explored how the voluntary sector emerged as an object of government policy, looking back to accounts of voluntary action in the 16th Century, and considering how the political landscape shifted over time, up to the Coalition Administration of 2010. This discussion has summarised how the relationship between the voluntary action, and then the voluntary sector, and the state over time has been discussed within extant voluntary sector scholarship and has thus provided the context within which this study is located.

Understanding how the concept of a 'voluntary sector' emerged, and the debates which surround this, helps to contextualise a study which explores the characterisation of the sector and the state, and the relationship between them, in both national documents and actor accounts. In understanding the definitional and identity debates which have been taking place over time, we can better understand how contemporary discursive strategies are part of an older story of shifting roles and relationships, cast within a changing state policy context. Such definitional debates are an important part of the context, but it is important to reiterate that it has been necessary for this study to adopt a definition of the voluntary sector, (see p7 of the Introduction) within which this empirical work is located.

The chapter which follows (Chapter 3) presents the methodology which guided this research project.

3. METHODOLOGY

This chapter will start with a summary of the aims of the research, and how the project was approached, followed by the details of the research strategy which guided this project. The study will be positioned in terms of my approach to research, what we can know about the world (ontology) and how I believe we can know it (epistemology). This sets the context of the subsequent research strategy chosen.

In the opening section this chapter discusses the conceptual framework on which the study is built, and how this framework informs the methodological choices made. This chapter then will go on to consider in detail each of the two stages of this research project: the discursive analysis of national documents; and the discursive analysis of individual actor accounts. For both stages, the appropriateness of the approach will be considered, alongside the detailed account of the methods used. The analytical approach taken within both the stages of the research will be outlined. The chapter closes with a discussion of the position of the researcher and the ethical considerations of this study. This section also explores the responsibility of the researcher.

This study of the relationship between the voluntary sector and the state was undertaken using a discursive analysis of national documents and accounts of voluntary sector actors. This involved developing a research strategy which would interrogate two levels of the institutional context; the societal context, and the 'micro' context which explores the level of the individual LIO actor within a voluntary sector organisational context. This meant that the approach was two-fold. The 'societal' aspect of the research process was designed in order to gain a better understanding of the ideas at play within the societal context in which LIOs, and the individual actors within them, are operating. This meant developing a research strategy that would enable an interrogation of the ideas which formed part of the national picture. This strand of the research involved a discursive analysis of a number of national documents authored within government departments. The context for this discursive analysis was the relationship between the state and the sector with particular reference to the service delivery agenda, and therefore the texts considered dealt, in part, with service delivery and the role of the voluntary sector within it.

The 'micro' (organisational) aspect of the research explored the accounts of organisational actors within local infrastructure organisations. This involved developing an understanding about how actors actively reworked societal ideas within their own narratives. The micro-level research strategy involved a series of semi-structured qualitative interviews with organisational actors undertaken in two phases (explained in more detail in Section 3.4 below).

An interpretive perspective guided this study, acknowledging that individuals have their own world views and perspectives. The aim of the micro-level strand of the research endeavour was to develop a better understanding of those multiple views, and consider what such an understanding could tell us about the institutional context and the agency of organisational actors. An abductive research strategy was created through the design of this project. Such a strategy takes seriously the social world view of the actors involved, and focuses on better understanding the actor accounts through exploring their language (Blaikie, 2000).

The interpretive perspective enabled the study to take seriously the interpretations of actors, acknowledging that, although actors exist within a structural and institutional context (Johnson et al, 2006) an actor's knowledge of the world is based on how they understand and reflect on their experiences (Snape and Spencer, 2003). Enabling an actor to speak for themselves does not mean that interpretive research views actors' accounts an unproblematic 'truths', but rather understands that "views, truths and conceptions of the real can never be wholly ripped away from the people who experience them" (Plummer, 1983: 57).

When embarking on an interpretive study, it is important to discuss the evaluative quality criteria against which such research should be judged. A mistake sometimes made within some extant research which is purportedly conducted within an interpretive framework, is to attempt to apply evaluative criteria which is associated with positivistic research, for example generalisability and objectivity (Johnson et al, 2006; Prasad and Prasad, 2002). An interpretive study is concerned with developing an in-depth understanding of particular accounts (Stake, 1995) rather than seeking to generalise findings across a population of organisations, for example. Similarly, objectivity is not sought within an interpretive study, but rather the subjective nature

of this research is acknowledged, in terms of the researcher's role in the construction of data through the research process (Henn et al, 2009).

However, whilst certain evaluative criteria are not appropriate for an interpretive study, it is important to discuss the quality of research within any research paradigm. There are particular strategies which have been designed into the research process of this study in order to ensure that the issue of quality is taken seriously. One such strategy which was applied across both strands of the empirical work within this study was to ensure that when an idea was identified, it was performing a function in more than one document or account and therefore had discursive 'stability' (Dick, 2004; Kilduff and Mehra, 1997). When approaching the research with organisational actors, a number of strategies were used, and these are summarised in Table 3 below[8]:

[8] Johnson (1997: 283) provides an extensive list of such strategies, and Table 1 below is based on this list

TABLE 3: Strategies to promote quality research

STRATEGY	DESCRIPTION
Low inference descriptors	The use of direct quotations where possible, and the use of descriptors which reflect the language used by actors within the study
Participant feedback	Following the initial scoping interviews, full transcripts were sent to actors in order to enable them to revisit their accounts. However, none wanted to challenge or add to accounts. At the end of the analysis period, conversations were held with one actor in order to discuss interpretations of data. This helped to ensure that the actor engaged with the analysis process, but also provided an indication of any problems with the interpretations. The time restrictions meant that further conversations were not possible, but this would be built into future research projects.
Peer review	The interpretation of the research was discussed with supervisors, but also a particular aspect of the interpretation was presented at a conference[9], which enabled research to be questioned and challenged, and alternative perspectives provided.
Reflexivity	Critical self-reflection in order to challenge my assumptions made within the research process. Keeping a research diary[10] was an important aspect of ongoing awareness of my position within, and response to, the research endeavour.

Applying such criteria to the research undertaken ensured that the quality of the research process was being observed, including the quality of the data collection and data analysis.

[9] NCVO/VSSN Conference in Sheffield in 2013

[10] An extract from the research diary (typed from original diary entry) is included in Appendix 9

3.1 Discourse and institutions: the development of a research methodology

Drawing on the existing body of institutional studies which engages with interpretive accounts of institutional contexts and processes (for example Creed et al, 2002; Lok, 2010; Phillips et al, 2004) has enabled a consideration of how discursive approaches could be illuminating when viewed within an institutional framework. This brought into focus the relationship between discursive acts (in this case national documents such as policy, and actor accounts) and institutions (Phillips et al, 2004). Within this study, the national state is taken to be an institution, and the public services domain is understood to be an established area of institutional life.

From an interpretive perspective, the approach which was developed focused on the ways in which discursive practices play an important role in the creation, maintenance or challenge of institutional order (Lok, 2010; Phillips and Malhotra, 2008). Focusing on discursive acts and processes, this approach takes seriously the accounts of individual actors as they make sense of their context (Zilber, 2006).

Phillips et al (2004) propose that such a discursive perspective suggests that, "institutions are constructed primarily through the production of texts, rather than directly through actions" (2004, 638), and that it is texts that allow for multiple translations. This in turn means that the experience, observation or discussion of social acts produces texts which then themselves help to constitute institutional context. Through the processes of producing a document or an actor narrative, texts are created which in turn illuminate and construct the institutional environment within which they exist.

As a study which considers ideas and discursive processes, this research drew on discourse analysis as a research approach which takes language seriously. Discourse analysis is a term used in different ways, depending on the body of literature, or context (van Dijk, 1997). It has been described simply as 'an attempt to answer the question of where meaning comes from' (Phillips and Malhorta, 2008), but more specifically, it is the study of language-use and the relationship between language and its cultural and social context (Paltridge, 2006). It takes an analysis beyond a consideration of just the descriptive qualities of language-use, and explores how language affects meanings and perceptions. It considers the interplay between text

and reader, and how this interplay constructs an understanding (Taylor, 2001). In studying discourses, we are studying an active process (Potter and Wetherell, 1987), whereby meanings and sense are attributed to language.

When considering discursive approaches for this research project, it became clear that there was a lack of existing studies which sought to understand more fully how language-use can reveal the complex ideologies at play within documents such as policies (Taylor, 2004). This study therefore seeks to responds to this gap, engaging in a discursive analysis which exposes the way in which ideologies underpin documents in different and overlapping ways.

Fairclough (2003:2) suggests that "social analysis and research always has to take account of language", and that language is an essential and irreducible aspect of social life. This approach to language within social research encourages a consideration of how the analysis of national documents might go beyond a fairly simplistic content analysis, and engage with the way in which language is used to achieve a purpose.

In a sense, policy analysis within a voluntary sector field context is not unique, as there are existing studies which consider policy developments relating to voluntary sector organisations (see for example, Cairns, 2009). However, conducting an analysis of documents which goes beyond a content analysis, and engages in the way that linguistic techniques are employed in order to position actors, assign roles and values, and embed political ideologies, has not been undertaken comprehensively in the social policy context from an institutional perspective. Also unique is the use of core institutional concepts which gave this study its theoretical underpinnings. In using discursive analysis to explore the identity characteristics of central institutional logics underpinning aspects of the state-voluntary sector relationship, this study considers the use of linguistic methods within voluntary sector context, viewed through an institutional lens.

The temporal dimension of the documentary analysis undertaken was an important factor in this study, enabling the observation of language in documents over time. This allowed for an exploration of the way in which the ideas in documents either remained the same, or changed over time (Taylor, 2004). The time period which was taken for this analysis was from 1978, as this is the year that the first review of voluntary action,

the report of the Wolfenden Committee, was published (6 and Leat, 1997). This therefore was a useful starting point, from which the central institutional logics prevalent within each political era could be explored.

The approach to the analysis of documents went beyond an examination of the literal content of the documents, and instead explored the semantics of documents, or the varied meanings of, and possible motivations behind, texts (Fairclough, 2003; Paltridge, 2006; Taylor, 2001). Based on this, a discursive approach to the analysis of documents was considered appropriate, informed by literatures on discourse analysis.

In interrogating these two levels of discursive activity, this study was therefore primarily concerned with the ways in which processes at the societal and the micro levels construct as well as respond to, their institutional context. However, the two levels of discursive activity were engaged with differently within this study. The analysis at the societal level involved a discursive analysis of the ways in which documents position the state, the voluntary sector and the relationship between the two. The ideas which exist at that level were of particular interest, rather than the *processes* by which ideas came to be absorbed or incorporated into the discursive landscape. The discursive analysis of national documents was useful therefore in order to consider the ideas and discourses which featured.

The study did not set out to examine the *processes* by which ideas came to feature, or gained or lost traction, at the societal level. There are existing studies which examine, or theorise, how ideas enter policy (see for example Beland, 2009 in his discussion of ideas and policy change; Campbell, 2002 in his discussion of the problems associated with linking ideas to policy making; Schmidt, 2009 in her discussion of Discursive Institutionalism). Although this would have been fascinating to study, taking this as a focus would not have led to a greater understanding about how ideas are interpreted, accepted and reworked at the micro level of individual actors, as articulated within the second research question (see Section 1.3 of the Introduction for the research questions).

The micro-level analysis was designed in order to explore the accounts of organisational actors working at the *local* or *field* level. Within the context of the study, this meant people within organisations working at the local level. Of particular

interest here was exploring the narratives of identity, and legitimacy, created by organisational actors, or the "explanations and justifications for the fundamental elements of their collective, institutionalized existence", (Boyce, 1996: 5). How actors within their accounts appropriated and reworked ideas which had been considered through the analysis of national documents was of central interest.

This focus meant that the empirical work at the level of individual organisational actors would differ from approach to the societal level empirical work. The qualitative interview was considered the most appropriate method to use at the micro level work, using a semi-structured approach, which would provide the actors with the scope to explore topics which occurred to them, but within a loosely structured framework. The interviews were conducted in two stages, the first series of scoping interviews helping to shape the subsequent main body of interviews. Even though the scoping phase was intended as a guide to planning the main body of interviews, some of the actors involved in this phase did reflect on aspects which became of central significance within the overall analysis. Where this was the case, some of the data have been drawn into the main analyses and therefore features in the data presentations within the empirical chapters. These are noted as 'scoping interview [number]' when an extract is used (within Chapters 4 and 5).

Having considered how the discursive approach for this study was developed, and how such an approach aligns with core concepts from institutional theory, the section which follows provides more detail in terms of how both phases of the empirical work were conducted. The societal level documentary analysis will be considered first, outlining the approach to document selection as well as the discursive approaches which formed the basis of the methodological approach and analysis. This is then followed by the details of the empirical work at the micro level.

3.2 The societal level: Discursive analysis of national documents

The starting point for this study, as set out in the title of this thesis, was 'the idea'. From this starting point, it was important to identify a method or set of methods which would enable discursive exploration of the societal-level ideas at play within national documents. Before exploring the detail of the discursive analytical method undertaken, the link between the idea and the discursive approach will be outlined.

This is the empirical route which was developed in order to render the concept 'explorable'.

The power of ideas has been explored by numerous scholars (see for example Beland, 2005, 2009; Jacobsen, 1995; Schmidt, 2009). Of particular interest in the development of this study have been those scholars who consider the way in which ideas, embedded within discourses, become 'absorbed' and accepted as 'assumed reality' (Hay and Rosamond, 2001; Macmillan, 2007; Watson and Hay, 2003). This was a useful starting point, because this study set out to empirically explore the extent to which actors interpreted and possibly reworked such ideas, rather than just accepted them as an assumed reality.

The study's focus was on how the relationship between the state and the voluntary sector was presented through a series of ideas, some of which had subsequently been unpicked and contested in extant literature (see as examples the examinations of 'grant dependency' in Macmillan, 2007; 'social capital' in Fyfe, 2005). As this study uses an institutional conceptual framework, a consideration of institutional literature demonstrates that extant institutional studies do not tend to focus on the role of ideas within institutional processes (Zilber, 2006). This study therefore adds to a small, but growing number of ideational studies within an institutional context (see for example Hardy and Maguire, 2010; Phillips et al, 2004) using the study of ideas in order to explore the agency of actors at the local level, and the degree to which actors might be reworking, rather than passively absorbing and aligning with, ideas from the societal level.

Having decided on this overarching endeavour, I then had to devise a way in which to explore this process empirically. This is where the theoretical concept of institutional logics comes into focus. Institutional logics have been defined as "organising principles guiding field participants" (Reay and Hinings, 2005: 354). Extant studies consider how documents can construct, or convey, institutional logics (for example see Lok, 2010), but this kind of direct analysis of national documents pertaining to the voluntary sector and its role had not been undertaken. Highlighting characteristics of overarching logics which suggested a particular role identity for voluntary sector organisations provided a way in which the study could consider ideas in documents, in terms of the ways in

which they communicated a particular set of beliefs and associated practices relating to voluntary sector organisations and actors.

The link between the overarching institutional logics and the ideas communicated through documents, or 'institutional messages' (Lammers, 2011) is central to this study. An 'institutional message' is defined as, "a message created in an interorganizational environment that transcends particular settings, interactants, and organizations" (Lammers, 2011: 19). Messages are considered to be at once the conduits for logics (Lammers, 2011), but also the sources or determinants of institutional logics (Suddaby, 2011). Within this study, the national documents are taken to be institutional messages. In making the link between logics and messages, this study explores how the power of ideas can both support and challenge the institutional context within which organisational actors participate. The concepts of both logics and messages are explored further in Chapter 4.

The first aspect of the empirical work on which the study is built is a discursive analysis of a series of national documents which considered the relationship between the state and voluntary organisations, or the voluntary sector, within a range of political eras over time. In order to identify the range of national documents to be considered within this aspect of the empirical work, a review of national documents was conducted. This review considered each of the political eras under scrutiny within the study and enabled a timeline of documents to be constructed (see Appendix 1). The documents which featured on the timeline all took as their subject (or part of their subject) the voluntary sector, its relationship with the state within the broad context of the sector's role in delivering public services. A full list of documents, including the government administration and authoring department are presented within Table 3.2 below.

TABLE 3.2: Documents included within the societal level analysis

Administration	Year	Title	Department
Labour	1978	Wolfenden	**Independent Committee**
Conservative	1989	Charities: A Framework for the Future	Home Department
Conservative	1990	Efficiency Scrutiny of Government Funding of the Voluntary Sector	Home Office
Conservative	1996	Meeting the Challenge of Change: voluntary action into the 21st century	**Independent Committee**
New Labour	2002	The Role of the Voluntary and Community Sector in Service Delivery: A Cross Cutting Review	HM Treasury
New Labour	2004	ChangeUp: Capacity Building and Infrastructure Framework for the Voluntary and Community Sector	Home Office
New Labour	2006	Partnership in Public Services: An action plan for third sector involvement	Cabinet Office
New Labour	2007	Third Sector Strategy for Communities and Local Government	Communities and Local Government
New Labour	2008	A Stronger Society: Voluntary Action in the 21st Century	**Conservative Party**
Coalition	2010	The Compact	HM Government
Coalition	2011	Open Public Services White Paper	Cabinet Office
Coalition	2012	Open Public Services	Cabinet Office

When selecting the documents for analysis a key criterion was selecting documents from across different Government departments, in order to consider the ideas and discursive strategies beyond a single department. A second criterion was that the documents dealt with aspects of the voluntary sector's role in the delivery of public services. This was a useful focal point, as this meant that the documents would need to articulate and explain aspects of the state-sector relationship, as well as be more explicit about the roles assigned to both the sector and the state.

There were two central documents which were identified within the Conservative administration of 1979-1997. There was notably fewer documents to scrutinise within this era than the subsequent era of New Labour (1997-2010), as the New Labour administration was far more prolific in its production of documents which considered, or focused upon, the voluntary sector. From this New Labour era, the documents selected were from the second and third administrations, due to their increased focus on the sector's role in the delivery of services as compared with the first New Labour administration (Richards and Smith, 2004). Four documents were selected, all produced by different departments within government. This approach was taken to try to ensure that the study was considering the range of ideas from across government. The third and final era considered is the Coalition administration (2010 to 2015) from which three documents were selected for analysis.

These documents selected do not represent the only documents which would have been of interest, but it was necessary to bound this aspect of the empirical work, and this meant restricting the number of documents. The intention was not to produce an exhaustive account of aspects of particular administration's approach to the voluntary sector, but rather demonstrate how illuminating ideas and discursive strategies could reveal something about the institutional attitude of an era. However, it is important to acknowledge the limitations imposed on the study by this choice of documents, and it is clear that a different range of documents, or a larger of number of documents, may have had an impact on the findings and therefore the conclusions drawn.

In addition to the nine national documents listed above, this document review identified three documents which were produced on the cusp of a change of administration, which were labelled 'transition documents'. These were not

documents created by government administrations, but documents created outside of government. Two were documents produced by independent committees, the first being the Wolfenden Report (1978), and the second being Deakin Commission Report (1996). The third transition document was created by the Conservative Party, whilst in opposition, in 2008. This was the green paper, 'A Stronger Society: Voluntary Action in the 21st Century'.

3.3 The analytical approach

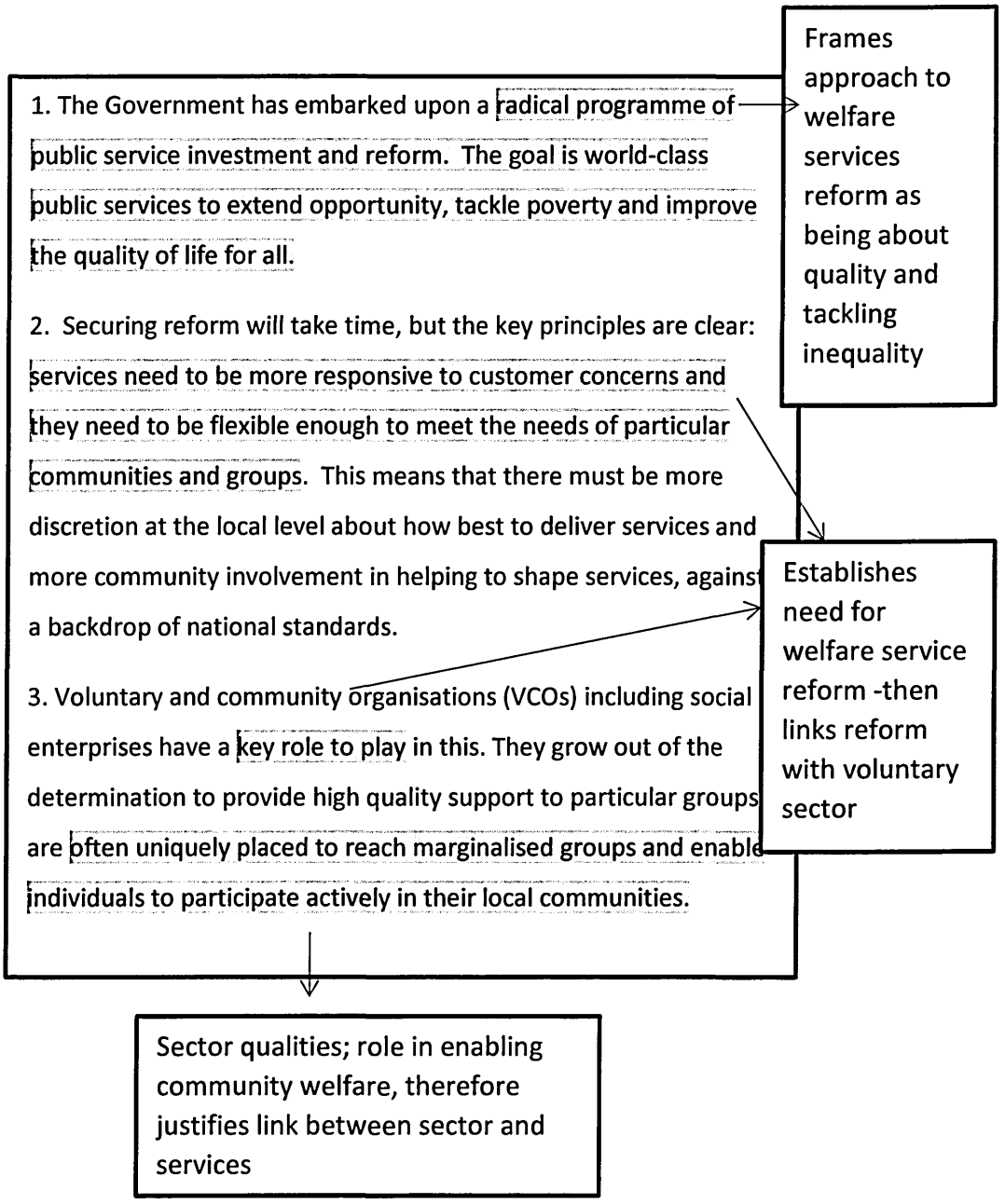
The process of analysis for each document involved a series of stages, starting with an initial read-through of the document, to grasp its meaning and central purpose. This initial read-through was an opportunity to identify sections of the document which were regarded as important to return to in more detail at a later stage. It is important to note that not all documents were scrutinised in full. Certain documents has sections which, having been read through initially, were discounted if not relevant.

The second stage of the analytical process was a discursive analysis, surfacing the language features and techniques which gave coherence to the range of idea elements within the texts (Creed et al, 2002). This process was about revealing the ideas, or central concepts around which the texts were built. Features such as voice, ideology and contradictions within a text were all aspects which helped to construct the analysis. As well as illuminating the obvious features of texts, such as the clear use of metaphor or particular emotive images, it was also useful to be alert to examples of "bland and seemingly innocuous policy statements and discourses that no one could object to", (Creed et al, 2002: 45) which can act as a veil for more highly charged political statements.

This stage of the analytical process was designed to draw out some of the central aspects of the document, such as tone, key messages and central ideas being communicated. However, there was a specific focus for this stage of the analysis; considering the ways in which the documents positioned, and treated, the state, the voluntary sector and the relationship between the two involved interrogating how both sectors were presented, and which roles were attributed to both.

The discursive analysis drew out the various characteristics of the documents, such as how different actors (the state, the voluntary sector) were being depicted, and the implications of such depictions on the way we read and understand the document. It also surfaced specific rhetorical devices that were being used. Figure 3.3.1 below is an example of this initial analysis of documents, and how themes were identified from these documents.

FIGURE 3.3.1: Extract from Cross Cutting Review (HM Treasury, 2002 p.5)



This first phase of the analysis, illustrated in Figure 3.3.1, explored the themes and discursive devices within documents. The next stage was to take each individual analysis and explore how each theme or device would contribute to a coherent interpretation which could in turn be drawn together. To this end a short narrative was created around each document, detailing the salient points of the discursive analysis, drawing together a central analysis. Telling the discursive story of the document helped to locate each one within a longer, temporal narrative, which enabled the consideration of how the concepts drawn from institutional theory would help to tell a particular story over time. It also safeguarded against losing the context of each document in the analytical process. Figure 3.3.2 is an extract which demonstrates how this initial analysis was drawn into a narrative. Such narratives proved important in ensuring that the analysis remained coherent with the purposes and contexts of the original documents. A full section of analysis can be viewed in Appendix 2.

FIGURE 3.3.2: Extract from discursive analysis narrative

The Cross Cutting Review (2002) surfaces this discourse, suggesting that good quality public services are crucial to civic life, and that the voluntary sector should be a partner with Government to achieve this goal, and enable society to reach its full potential. Within the opening paragraph of the Foreword to the document, the document states that the Government needs the Voluntary Sector to "reform public services" and support the "reinvigoration of civic life" (p3). Immediately the scene is set for the positive partnership. By the third paragraph, this new partnership is assumed to already be in existence, as it suggests that "This partnership *is* about fresh ways of thinking", (p3) (italics added).

As well as making overt references to the importance of the partnership between the State and the Voluntary Sector, The Cross Cutting Review (2002) uses linguistic devices to bring the sectors closer together. For example, the document refers to "our shared objectives" (p3), and "our joint vision" (p3), using the possessive determiner "our" to bring the sectors closer together, so they share the responsibility.

The next step in the analytical process was to aggregate the data from the numerous documentary analyses into themes. It was at this point that the analytical themes were brought together within coherent categories which identified the characteristics of institutional logics which conveyed particular role-identities for voluntary sector organisations within the documents. The table below (Table 3.3) demonstrates this process.

TABLE 3.3: Example extract from analytical table

Extracts from documents	Themes identified	Characteristic of the logic: role-identity
"Voluntary and community organisations...are often uniquely placed to reach marginalised groups and enable individuals to participate actively in their local communities" (Treasury, 2002: 5)	Sector qualities, role in enabling community welfare	**Role of the sector:** COMMUNITY EMPOWERMENT OBLIGATIONS - the sector has a role to involve people in civic life, and enable voices to be heard by decision-makers
"Frontline organisations also provide channels through which people can articulate their views to Government and other agencies" (Home Office, 2004: 12)	Sector qualities, role in communicating voices	
"I value the sector's role as an advocate and campaigner for individuals and groups who need a stronger voice in our communities; as a catalyst for cohesion between communities because it is trusted and can form those vital links to bring people together; and as a force for social justice and tackling inequalities", (DCLG, 2007: 4)	Sector qualities, role in cohesion and tackling inequality	

This staged process of analysis provided an audit trail of sorts, which made it possible to trace back how the subsequent analysis had drawn on initial themes in order to illuminate the role-identity being constructed and communicated. This approach meant that throughout the process, the analysis didn't become detached from the content of the documents or lose sight of how certain analytical interpretations had been drawn. This data subsequently enabled the interpretation of the discursive detail

into theoretical discussion, considering the way in which national documents act as institutional messages, in part constructing and conveying the institutional logics of a political era.

This approach also supported the study's focus on data quality (refer back to Table 3 for detail of data quality), in that it retained the use of direct quotes and ensured themes were not 'unstable' (Dick, 2004). This meant that I could ensure that particular devices performed a function in more than one text.

Having detailed the methods through which the societal level discursive analysis was conducted, including the theoretical and methodological underpinnings of these choices, this discussion will now move onto consider the methods undertaken in order to explore the micro level, or the level of the organisational actor.

3.4 The micro level: discursive analysis of actor accounts

The work undertaken at the micro level involved a discursive analysis of the accounts of organisational actors. Whilst the societal analysis, detailed above, centred on a discursive analysis of existing documents, the work at the micro level focused on the accounts of organisational actors created within interviews. The analysis considered the discursive work, and in particular, the identity work undertaken by actors within their narratives. The study set out to critically consider the predominant presentation of the passive actors at the organisational level, and explore the degree of agency, in terms of how actors might be reworking ideas within their narratives.

The micro level is defined within this study as the individual organisational actor within a local infrastructure organisational (LIO) context undertaking their everyday activities (Lok, 2010). This work at the micro level involved exploring the identity work undertaken by actors within their individual narratives. Of particular significance was the interpretive approach to the study of language, as it is constructive of social and organisational realities of actors (Heracleous, 2006).

Philips et al (2004) propose that a discursive perspective suggests that "institutions are constructed primarily through the production of texts, rather than directly through actions" (2004: 638), and that it is texts that allow for multiple translations. It necessarily follows that the experience, observation or discussion of social acts

produces texts which then themselves help to constitute the institutional context. Informed by such studies, the ontological position taken within this project supports this sense of institutions are structures which are created in multiple ways. A feature of this is that institutions, as social structures, are understood to be structures which can be created, supported, altered or destroyed by social actors.

The following section of the methodology chapter provides an account of the methods undertaken within the exploration of the micro level. The first step in this process was the decision about how to gain 'access' to the accounts of voluntary sector actors, and the decision was made that actors within local infrastructure organisations (LIOs) would be an appropriate population with which to work. The explanation for the choice of LIOs will now be presented, before going on to consider the first phase of this work at the micro level: the exploratory interviews. The suitability of this method is outlined, along with the details of how participants engaged with the study. As with the discussion surrounding the societal level study, the analytical process taken within this second aspect of the project is then considered, including the rationale behind the series of stages undertaken. The chapter concludes with a discussion of the ethical considerations which ran throughout the research process.

3.4.1 Actors from which organisations? The choice of LIOs

Local Infrastructure Organisations (LIOs) were considered an appropriate population with which to work. LIOs, also referred to as CVSs (Councils for Voluntary Services or Voluntary Action) were initially established in order to coordinate the work of individual charities (Rochester, 2012) (See Chapter 2, p23 for a description of the history of CVS). Although their activities have shifted over time, their position and role has been consistent at the interface between state structures (for example, local authorities, health structures) and local voluntary sector organisations (Macmillan, 2011). This interface role was particularly pertinent to the research questions at hand, which focus on this state-sector relationship. For example, such organisations perform a function of communicating policy shifts, or new agendas to their membership, chiefly local voluntary and community organisations.

LIOs are not topic specific, for example these kinds of infrastructure organisations don't operate solely within a field of social care, or health, or housing. Due to their

role in supporting local voluntary and community action, they could be considered generalists. Their position, being located between the agencies of the state and frontline non-profit organisations (Macmillan, 2011) makes them an appropriate body of organisations from which to source participants. Their role in navigating and managing this interface, as opposed to a specific topic of interest, was important. The study wasn't restricted to a specific area, but set out to consider more generalist contextual factors being experienced currently, such as the austerity agenda (Lowndes and Pratchett, 2012), deficit reduction and the associated budget cuts (Macmillan, 2011), and the general shift in the commissioning and procurement landscape which voluntary organisations are experiencing (Buckingham, 2009). Although their generalist function was a key criterion for this study, it is also important to note that focusing on LIOs rather than taking a broader range of organisations may have affected the data gathered. This is reflected on further in the Concluding chapter.

For the main research phase, due to the practicalities of accessing organisations on multiple occasions, and the restrictions of travel distances, the North West of England was identified as an accessible area for sampling participating organisations. Accessing organisational actors involved developing a key, strategic contact -either the chief executive, or senior member of the staff body - which could then facilitate contact with other staff and board members. This 'snowball sampling' (Cresswell, 2007) worked effectively within this study, as the list of possible participants within each organisation differed, and therefore a key contact within each organisation was a useful way of securing the involvement of appropriate participants. Participant selection is discussed in greater detail below.

3.4.2 Qualitative Interviews

The qualitative interview was the central research method within this second aspect of the study. Two stages of interviews were planned within the research strategy. A series of exploratory interviews were conducted in order to help to shape the subsequent interviews within the core research phase (see Taylor and Warburton, 2003 as an example of where scoping interviews were used to refine the subsequent qualitative study). This exploratory or scoping phase was then followed by the main body of interviewing.

The aim of the exploratory phase was to explore actors' responses to ideas which had emerged from early aspects of the literature review: these included ideas such as relationships between statutory and voluntary sectors, the voluntary sector as an object of policy, and public service delivery and its impact on voluntary organisations and their relationship with statutory bodies (themes surfaced within Chapter 2 of this thesis). The exploratory phase of interviews also enabled a consideration of the appropriateness of the qualitative interview as the central method to be used.

For a study of this kind, it was necessary to consider a method which help to explore the details of how individual actors created accounts about their context (Dick, 2004). This discursive approach acknowledged the nuances of different individual experiences, and their legitimacy within a complex organisational and group, or sector, context. Rather than seeking to generalise across the voluntary sector, for example, this study sought to explore how individual accounts could help to build a picture of the institutional context, and the significance assigned to different ideas within that context. The qualitative interview created the space within which individual actors could consider these issues.

When planning which method or range of methods to employ in order to explore the micro level of the organisation, one possible method considered was the analysis of organisational texts, such as organisational or project reports. It has been suggested that such texts can be considered 'natural texts' (Dick, 2004) as they occur as part of the everyday activities of organisations. This approach seemed to be coherent with the societal level of analysis being undertaken, i.e. the discursive analysis of *existing* texts. There were also numerous examples of such texts which could be accessed within the organisations taking part.

It has been suggested, however, that organisational texts can often be restricted by rules of appropriateness, whereby texts present simplified, unproblematic accounts, which do not represent plurality of meaning which should, in fact, characterise such texts (Barthes, 1977). One particular concern was whether this potential limitation explored by Barthes would restrict the range of ideas which might be at-play within the context of the organisational actor. Reliance on such potentially 'simplified' texts within the central body of the research therefore seemed potentially problematic.

That is not to say that texts which existed within the context of the organisations were not considered in any way. Rather than using existing texts as a central aspect of the empirical work, a range of organisational texts were collected during the empirical stage of this project, in order to provide useful background/contextual information, which would potentially help develop a better understanding of individual accounts. These texts were not, however, used as a primary data source. Instead, qualitative interviews were used as a way of enabling each actor to relay their individual account. Dick (2004) suggests that collecting 'texts' from interview is particularly useful when the researcher has a particular question which they are interested in. The scoping interview exercise exposed areas of interest which could then be considered within the interviews with organisational actors.

The semi-structured interview provided a framework within which actors could construct their accounts. In engaging individual actors in a spoken interview, the spoken word, once committed into written format by the researcher, was treated as a text (Heracleous, 2006). It is important to note my role as the researcher in this process. Such 'texts' are created within an interaction between the organisational actor, or participant, and the researcher, and the researcher then commits the spoken word into a written text. The implications of this will be considered below (Section 3.6). This methodological approach enabled an in-depth understanding of the accounts of actors to be developed, which provided an insight into the way that actors framed their narratives (Heracleous, 2006). The primary concern was how actors within their individual accounts used ideas to interpret and present actions and experiences within their organisational context.

The themes identified during the first phase of interviews informed the creation of an interview schedule (see Appendix 8) which was designed to guide the discussion, and provide prompts where needed, in order to encourage the participants to develop their own narrative within the context of the interview (Arthur and Nazroo, 2003).

Many studies which engage an institutional framework adopt a realist approach and do not consider in any depth the role that discursive practices might be playing in organisations and the experience of organisational actors (Philips et al, 2004). In adopting a discursive approach, this study builds on a growing trend in institutional

research (see for example Gower and Philips, 2013; Lok, 2010) which takes seriously a more nuanced consideration of the processes at a micro level, whereby organisational actors engage in discursive acts in order to account for, and engage with, the institutional context. The subject of the institutional approach to the micro level study is dealt with to a greater degree in the discussions of agency and identity work within the empirical chapters 5 and 6.

3.4.3 Identifying participants

One national, three regional and three local infrastructure organisations were identified for the scoping interview phase. These were identified through a mapping of infrastructure bodies within the north and north-west. Letters were sent to these organisations, introducing the project and the purpose of the initial scoping research phase (see Appendix 5 for a sample letter). Eight positive responses were received, and subsequently individuals from these organisations took part in the scoping interviews. Two individuals from one organisation took part in interviews, which meant that nine scoping interviews were conducted in total. The table below (3.4.3A) provides the details about the kind of roles participants in the scoping phase as well as the scale of the organisation within which the participants were based:

TABLE 3.4.3A: Participants in the scoping phase

Participant number and Organisation description	Participant – role within organisation
1. **National infrastructure organisation**	Senior member of staff engaged in policy related to health and social care
2. **Regional infrastructure organisation**	Chief officer
3. **Regional infrastructure organisation**	Chief Officer
4. **Regional infrastructure organisation**	Senior member of staff
5. **Local infrastructure organisation in the north west of England**	Chief Officer
6. **Local infrastructure organisation in the north west of England**	Senior officer with responsibility for voluntary sector development
7. **Local infrastructure organisation in the north of England**	Senior officer with responsibility for partnerships
8. **Local infrastructure organisation in the north of England**	Chief Officer
9. **Local infrastructure organisation in the north of England**	Officer working in a voluntary sector development role

In order to gain access to organisational actors for the core research phase, three local infrastructure organisations were accessed, based on contacts developed within the scoping phase of the research as well. From an initial contact, the study relied on 'snowball sampling', whereby the central contact recommends additional participants (Cresswell, 2007). In preparation, a short information sheet about the study was produced (see Appendix 4), which outlined the objectives of the study as well as an overview of the kinds of topics which would be covered. This enabled actors to consider whether their role within the organisation would render them a suitable participant, and indeed, whether they wanted to engage. Although this self-selection may have impacted on the data gathered, because all organisations operate differently, with different roles, different job titles and different activities, it was not appropriate to identify a list of people who would be the most appropriate participants to engage in the study. Snowball sampling did make it possible to work through a central contact in order to avoid trying engaging individuals who did not want to participate. Working through a central contact helped encourage participation, as there was already support from within the organisation.

From the outset, potential participants were provided with information about the study and what would subsequently be done with the data produced or provided (see Appendix 4) (Lewis, 2003). This was the first step in the process through which informed consent was sought from participants. The subject of informed consent will be returned to within the 'Ethical Considerations' section below.

As I was transcribing the interviews, participants were provided with pseudonyms (see Section 3.6). However, within the empirical chapters, extensive quotations are used, as this was considered an important part of ensuring data (and analytical) quality. However, this led to concerns that, extensive quotations which were attributable to a single individual, may (however unlikely) increase the chance of identifying who the participants were. After careful consideration, the identifying pseudonyms were therefore removed from the extracts contained within the empirical chapters. Instead, direct quotes refer to 'staff' or 'trustee' and the organisation (A, B or C).

Three local infrastructure organisations were purposively selected (Cresswell, 2007) to engage in the study. The three organisations were comparable in terms of their central aims and objectives and their core activities. However, they differed in some ways, such as organisation size and age. It was anticipated such purposive sampling would provide access to a range of organisational actors, working in a range of different contexts within relatively typical infrastructure organisations (Devers and Frankel, 2000). All three organisations were considered to be 'typical' infrastructure organisations', offering a similar set of services to the voluntary sector at the interface between the state and the voluntary sector in their geographical area.

These were important criteria in the selection process, particularly when reflecting on the quality criteria against which this research would be judged. It was important that the organisations engaged were considered 'typical' because it was anticipated that their position at the interface between the voluntary sector and the state would be important in terms of the ability of actors to reflect on the local implications of national ideas.

Table 3.4.3B below provides more information about the participants, including the nature of the organisation within which they worked/volunteered, and a brief descriptor of their role:

TABLE 3.4.3B: Participants from the three LIOs

Organisation	Participant pseudonym and role	About the participant
Organisation A Organisation A is a medium-sized infrastructure organisation operating in a city in the north of England, employing 27 members of staff.	Ava – Trustee	Ava had been a trustee with Organisation A for over 20 years. Alongside this role, Ava has a position in an academic institution.
	Bella – Staff	Bella has been a member of staff for just under a year, and her role is to offer advice and information to voluntary groups in the locale.
	Claire – Trustee	Claire is a voluntary sector rep on the board of trustees, and works for a local charity.
	Chris – Staff	Chris has worked for Organisation A for approximately 6 years. She is involved in supporting organisational networks
	Frank – Staff	Frank has worked for Organisation A for over 10 years. He initially started within a team which administered local funding, but has since taken on a broader partnerships role.
	George – Chief Officer	George has been the chief officer for over 10 years.
	Harry – Trustee	Harry has been on the board of trustees for approximately 5 years.
	Jess – Chair of Trustees	Jess has been on the board of trustees for over 10 years, and has been the chair of trustees for 5.
	Lewis – Treasurer	Lewis has been on the board of trustees for over 20 years

	Matthew - Trustee	Involved for approximately 4 years
	Nick – Trustee	Involved for approximately 2 years
Organisation B **Organisation B is a medium-sized infrastructure organisation operating in a borough in the north of England, employing 21 members of staff.**	Andrea – Staff	Andrea has worked for Organisation B for approximately 7 years. She runs a network of children's organisations
	Bernadette –Staff	Bernadette manages the volunteer centre, which has recently (in the past year) merged with Organisation B.
	Clive – Chief Officer	Clive has been the Chief Officer for 5 years
	Daisy – Staff	Daisy supports organisations with a specific focus on health and social care. She has held this role for 5 years.
	Ethan – Staff	Ethan leads on policy and partnerships, and has held this role for approximately 3 years
	Fiona – Trustee	Fiona has been a trustee for 2 years, and works in the local voluntary sector.
Organisation C **Organisation is a small infrastructure organisation operating in a city in the north of England, which employs 12 people.**	Alice – Staff	Alice manages the team of development workers in Organisation C, and had held this position for 4 years
	Bea – Staff, Deputy Chief Officer	Bea is the Deputy Chief Officer, and had been acting Chief Officer for a time. Bea had worked for Organisation C for 8 years
	Callum – Staff	Callum was a development officer with a specific focus on health and social care. He had worked within this role for 4 years
	Eve – Trustee	Eve had been a trustee for approximately 3 years.

3.4.4 Data Collection

31 semi-structured interviews were conducted in total, with 9 in the exploratory phase, and a further 22 in the central research phase. In total, these interviews produced 489 pages of typed transcripts. A topic guide was designed, which covered introductory questions about the organisation, followed by questions which asked about the organisational response to the agendas such as austerity and commissioning, as they impact on aspects of the voluntary sector (full topic guide in Appendix 9).

28 interviews were conducted face-to-face, in the premises of the organisations involved. 3 interviews were conducted over the telephone, at the request of the participants. These interviews were all shorter than the face-to-face interviews, with telephone interviews lasting no longer than 35 minutes, and face-to-face lasting on average an hour. The implications of the differing interview contexts will be discussed below under 'Ethical considerations' (Section 3.6).

The interviews were semi-structured, but designed to enable respondents to take the discussion into areas they considered relevant (Bryman, 2004). This is based on the approach to interviewing extolled by Kvale (1996), in that the focus is on exploring the life-world of the interviewee, considering their perspective on the issues being discussed. The advantages of this method within this research project was that it allowed and enabled participants to explore ideas in different ways, which is something which would certainly have been very difficult to interrogate though quantitative methods, or indeed through more structured approaches (King, 2004a). As far as possible, it was important to be able to explore the plurality of meanings which individual actors draw into their accounts (Barthes, 1977) as well as enable actors to elaborate the frames with which they make sense of their experiences through their accounts (Heracleous, 2006).

This approach to engaging the participant actively in the research process, and not limiting the 'discussion' to pre-ordained questions set by the researcher, was coherent with the attempts within this study to re-dress some of the power imbalances which are inherent within a research interview (Hammersley and Atkinson, 1993; Richards

and Schwartz, 2002). This is discussed further in Section 3.6 below, under 'Ethical Considerations'.

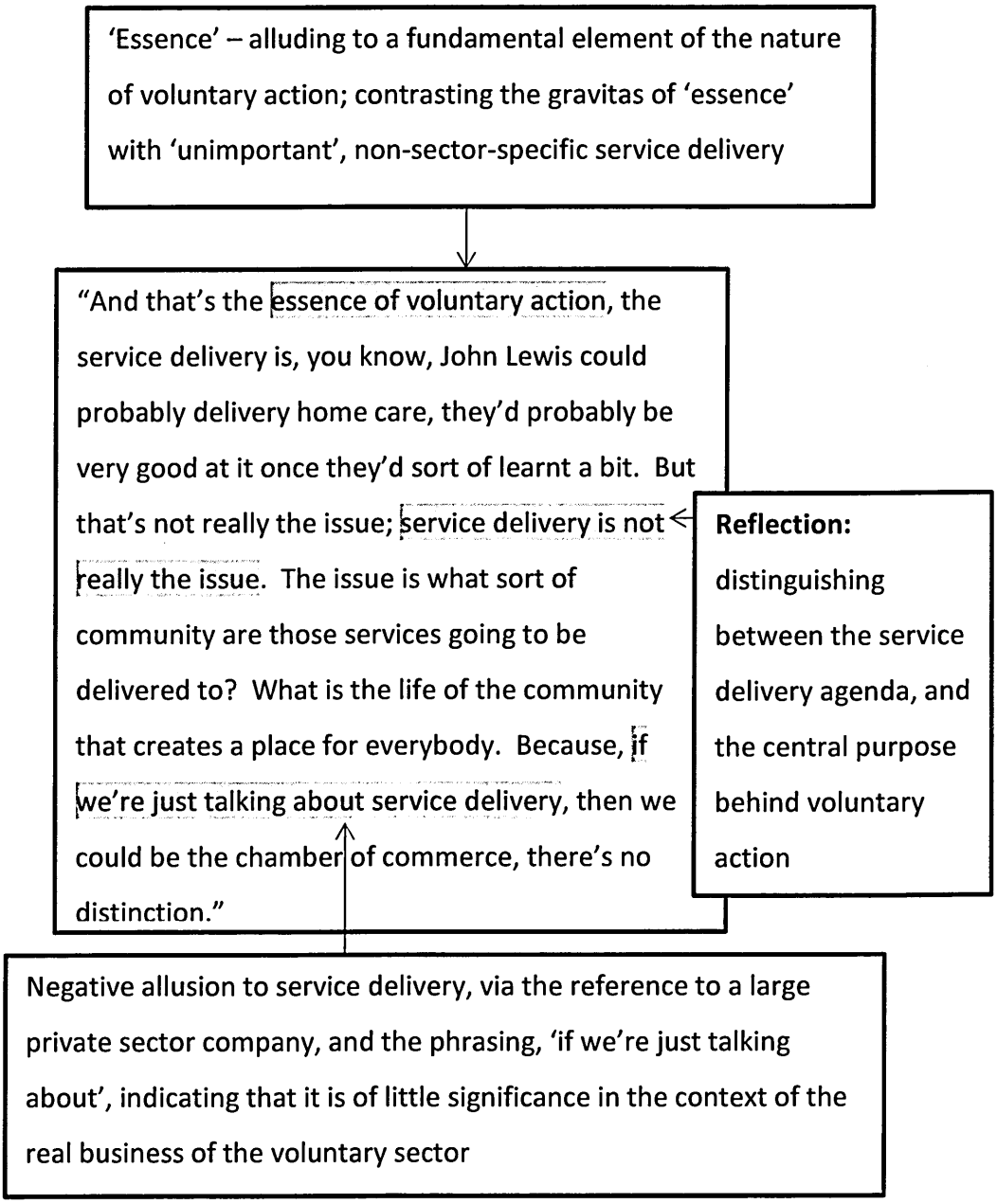
3.5 The analytical approach

As with the analysis of national documents, similarly the analysis of each actor account involved a series of stages, starting with an initial response to the interview experience, listing briefly the central themes which had occurred during the interview itself. This was then followed by a detailed transcription of the full interview, and then an initial read-through. This initial stage helped in the development of an understanding of each transcript as a whole, which was important in terms of retaining a sense of the context of the data as the analysis progressed (Creed et al, 2002).

The next stage involved a more detailed consideration of the ideas which were discussed by the organisational actor. This involved an in-depth consideration of each transcript, taking note of the ideas alluded to, the choice of language and whether specific linguistic devices were used to achieve particular effects. A short extract is included in figure 3.5.1 below, which provides an example of the kinds of language elements the initial analysis exposed, and how this stage of the analytical process was conducted. This in-depth analysis involved annotation of the transcripts, with both single words to denote themes, and longer explanations which could be returned to.

In figure 3.5.1 below, individual words such as 'essence' are identified, the significance of which is pointed to in the short accompanying note. Broader reflections are also made in terms of the sense of a phrase, or section of text. Following this kind of discursive approach, it was possible to consider themes which participants raised, but also explore the ways that individual actors used discursive devices within their accounts.

FIGURE 3.5.1: Extract from interview with George, Organisation A



The analysis of each transcript was followed by a process whereby the central elements of the analysis were drawn together, not conducting direct comparisons between different accounts, but instead considering the points of coherence. To take the example as illustrated in figure 3.5.1 above, the range of examples were drawn together within which discursive strategies were used to distinguish the voluntary sector from others, using ideas of sector and/or organisational identity as a distinguishing factor.

In order to make sense of the different accounts, exploratory narratives were created around the broad themes identified, in order to consider their coherence. A short extract is included below (Figure 3.5.2), in order to illustrate how this aspect of the analytical process was conducted (a full section of analysis can be viewed in Appendix 10).

This stage was about processing the analytical observations from the individual in-depth analyses.

FIGURE 3.5.2: Extract from analytical narrative

> There is a sense that part of the significance of organisational ethos and values is that they are understood by others, and in some way have come to signify organisations within the voluntary sector. This is referred to by a number of actors as the 'essence' of the sector, and could be considered a central aspect of the identity of organisations and the sector as a whole. It is suggested by some that it is a key aspects which sets this sector apart from others, for example, in the private sector.

This narrative exercise helped the process of exploring central theoretical dimensions using a series of analytical tables to trace through the arguments across individual accounts, abstracting them to a theoretical dimension.

Table 3.5 below provides an extract from one such analytical table, in order to demonstrate how the analytical threads were drawn together. A series of data references are contained within the first column, and alongside these in the second column are outlined the idea to which the actors allude or refer, and which were identified in the initial thematic analysis. The third and fourth columns then identify the analytical categories formed by grouping themes, and the theoretical dimension, which highlights the discursive strategy engaged.

As an illustration, the table below demonstrates how the analytical process moves through from data to a theoretical dimension. In this case, the argument is concerning how organisational actors engage in identity work (explored in more depth in Chapter 6). This kind of visual tracing through of the argument enables the subsequent

narratives to retain a clear focus on the data, and the theoretical arguments stemming from it. This is a further example of how appropriate quality criteria were applied throughout the analytical process (A full 'data map' detailing how each of the theoretical dimensions were reached is included in Appendix 11).

TABLE 3.5: Example extract from analytical table

Data	Thematic Analysis	Analytical Category	Theoretical dimension
George: *"And that's the essence of voluntary action"*	Essence of sector (more important than 'mere' service delivery)	Importance of normative identity cues associated with the voluntary sector	**Identity work based on normative identity cues aligned with ideas of 'enduring voluntary action'**
Alice: *"Our mission, and our mission will stand, and regardless of whether we get the tender or not"*	Strength of mission, values and ethics of voluntary organisations. (regardless of a tender service delivery)		
Andrea: "They are skilling up the local community"	The voluntary sector holds communities together		

The final stage in the analytical process was to consider this institutional story, and at this stage it was useful to refer back to the societal-level discursive analysis, in order to consider how and where the two levels interacted. In demonstrating how individual organisational actors engaged in identity work, involving discursive strategies, it was then possible to consider how such work related back to the societal level findings. This level of analysis enabled the bringing together of the micro level data and the societal level data, in order to consider how, for example, role-identities associated with different institutional logics, constructed through national documents, can be rejected at the organisational level, via discursive strategies which appeal to role-identities of alternative institutional logics.

Having explored the research strategy in detail, the final section of the methodology chapter will elaborate on the ethical considerations which guided this project. This

discussion includes a consideration of my role as researcher within the process, and how issues of co-production were dealt with. The discussion goes on to reflect on the power of the researcher, and the methods which were engaged in order to surface, and try to mitigate for, some of these factors. This is followed by a discussion around reflexivity and the approach to achieving informed consent.

3.6 Ethical Considerations

There are a number of ethical considerations which featured throughout the research process, and which therefore demand consideration at this point in the thesis. Each of these are considered in turn below, including considering the issues of researcher involvement in the research process, power within the research relationship and the issue of informed consent. All such issues were important aspects to reflect-upon during the process of seeking ethical approval through the University Faculty's ethics committee (see Appendix 3 for the completed ethics pro forma).

This study's approach is founded upon the co-production of accounts, and this needs to be surfaced and discussed. Fairclough (1989: 167) explores the way in which the researcher is active in the research process, suggesting that 'the only access that the analyst has to [discourse processes] is in fact through her capacity to herself engage in the discourse processes she is investigating'. It necessarily follows that this active co-productive process draws on both the researcher and the participants' knowledge and assumptions (Fontana and Frey. 2008).

This understanding has important implications for the kind of quality criteria against which this kind of interpretive research endeavour should be judged (see Table 3 above). For example, evaluative notions such as objectivity and generalisability are suggestive of a positive approach, and as such would not arrive at a meaningful set of conclusions for an interpretive study (Jonson et al, 2006).

Following on from this consideration is a subsequent reflection on the power of the researcher (Henn et al, 2009). The interaction, although two-way within the interview setting itself, had been created by me as the researcher; initiated, planned and conducted. This created a power dynamic which put me as the researcher into the position of 'running' the interview. There was an attempt to resolve some of these imbalances by stating at the start of the interaction that the questions were only a

guide. Participants were encouraged to raise any additional points I hadn't considered within the interview schedule, reject specific questions if not relevant or indeed to develop the discussion as they deemed appropriate or necessary. In short, the 'interviews' represented a conversation with purpose rather than an overly structured exercise (Legard et al, 2003).

A second attempt to acknowledge, and compensate for, the possible power imbalance (Hammersley and Atkinson, 1993) was to create a friendly, relaxed tone to the interaction, generating more of a conversation or discussion rather than a formal interview. Most participants did respond well to this, with the exception of the three interviews which were conducted over the phone. These differed in tone, as it proved more challenging to develop the same rapport over the phone. These interviews were, without exception, shorter than the face-to-face interviews. This did, in-turn, have implications for the depth and quality of the data from these interviews. When analysing this in more depth, it was clear that I asked fewer follow-up or probing questions during telephone interviews, and the actor responses were shorter. One possible explanation for this is the lack of rapport relative to the face-to-face interviews (Stephens, 2007), and also the lack of visual cues for both me as the researcher and the actor involved, in terms of encouraging further discussion without verbal prompts.

One final way in which this imbalance was confronted was through the provision of interview transcripts to all nine actors involved in the scoping interviews, as well as an in-depth discussion with one actor following the analysis phase, to discuss interpretations. Time limitations prevented similar discussions with other participants, but this is a feature of the research project which I will endeavour to build-in to subsequent research wherever possible.

However, despite these attempts to in some way mitigate for the power imbalance, it was inevitable that I as the researcher was in control of the research process to a greater extent than the participants (Richards and Schwartz, 2002). I was the actor who would take away the spoken discourses, commit them to paper and conduct the analysis. The analytical process reinforced the active role of the researcher, as beyond the interview setting itself, the analysis involved drawing on my own resources

(Fairclough, 1989) such as general knowledge and experience, as well as beliefs and assumptions about the nature of the social world, which become particularly poignant in 'talk-based' approaches (Samra-Fredericks, 2004).

The inevitability of the power-imbalance in this kind of discursive research makes it particularly important to acknowledge the responsibility the researcher has to the research relationship, and to take issues of accountability seriously (Social Research Association, 2003). The responsibility of the researcher to retain a clear, transparent focus on the data throughout the analytical process has remained, as demonstrated above (see figures 3.5.1; 3.5.2 and table 3.5 above).

It is important to surface these issues of power and responsibility, and to consider the active role I, as the researcher, played in the construction of the empirical work on which this thesis is built (Cassell, 2005), even though it was not my intention to try to 'control' all these issues out of the research process. That I played an active role in the research process is clear, and it is necessary that the researcher acknowledges this active role in order to shoulder some of the responsibility for the data produced (Hertz, 1997). These ideas link into considerations about the reflexive research endeavour, which involves reflecting on the interview process and considering the different levels of the interpretive act. Reflexivity within social research involves having an awareness of the self within the research process and what this 'self' brings to the process of conducting research and interpreting the findings (Alvesson & Skoldberg, 2000).

A central consideration within this research project was the degree to which I brought my experience of working within voluntary sector organisations into the interview interaction, and subsequent analysis. Whilst it is important to acknowledge this "linguistic, cultural and theoretical ballast" (Alvesson and Skoldberg, 2000: p242), I was not seeking to rid myself of this experience, or 'ballast', in order to achieve some kind of objective stance within the research process (Blaikie, 2000). Instead, in surfacing my role as an active participant, I sought to acknowledge my subjective role (Haraway, 1988) and in locating myself, ensure that the research project as a whole, and my analysis within it, made sense.

Within the context of this discussion on the power dynamics of the research relationship, one particularly important factor in the research process is obtaining informed consent (Social Research Association, 2003). Ensuring that those involved in this study were able to provide informed consent was an ongoing process, initiated at the point of first contact, and revisited at the start and conclusion of the interviews (Lewis, 2003).

Ensuring that participants engaging in this study were in a position to provide informed consent involved providing detailed information from the outset about the purpose of the research, how the data would be treated, and what would be produced as a result of the research process, both now and into the future. It was also important to ensure that participants understood their rights within the research process, such as the ability to withdraw at any point, or not respond to particular questions. As well as including this kind of information in early correspondence/contact with people, it also formed the basis of a detailed consent form with which all participants were provided prior to starting the interview (an example consent form is included in Appendix 7). It was always discussed prior to being completed, to make sure that people understood the points, and had the opportunity to ask any questions. One feature of this consent form included a point about anonymity (Lewis, 2003), and it was made clear that all information would be anonymised. It was an important feature, particularly as it is not always clear which topics are going to prove sensitive either during the interview, or indeed at a later stage, (Blaikie, 2000).

3.7 Conclusion

This chapter has presented detailed accounts of the two stages of the empirical work central to this project; the discursive analysis of societal policy documents, and the discursive analysis of LIO actor accounts. Having explored the choice of documents and organisations, and the inevitable limitations imposed by such choices, and the access to participants, the chapter has explored in depth the analytical approach taken during both stages. This provides important context to the chapters which will follow: the three chapters exploring the empirical material collected during this research project.

Chapter 4 presents the discursive analysis of the societal-level documents. Chapter 5 is the first of two chapters which consider analysis of the actor narratives, exploring how actors describe the shifting field-level context along with the implications of these changes on their practices. Chapter 6 explores the identity work undertaken by actors at the local level in order to align with, or indeed resist, role-identities.

4. INSTITUTIONAL LOGICS AND POLICY ERAS: A DISCURSIVE ANALYSIS

The purpose of this chapter is to present one aspect of the empirical work; a discursive analysis of national documents. This aspect of the empirical work explores the ideas which predominate within societal-level documents (such as national policy documents from government) with regard to the voluntary sector, the state and the relationship between the two. This analysis was conducted in order to explore the ideas used within documents over time, and consider how documents are used as a means of constructing and conveying aspects of the institutional context. The way in which discursive features of documents portrayed role identity characteristics was of particular interest because this illuminates how the state casts voluntary sector.

This analysis is the first step in a study which directly responds to the failure in extant institutional literatures to effectively bridge the societal (or macro) and micro levels of institutional analysis (Lammers, 2011; Lawrence et al, 2011; Thornton and Ocasio, 2008). The focus for this study as a whole is the societal and micro institutional context of the relationship between the state and voluntary organisations and actors. This first empirical chapter considers the macro context, as presented through (or characterised by) the ideas contained within the national documents of a given political era. This chapter presents the empirical work which resulted from this discursive documentary analysis, which seeks to directly respond to the first research question for this study:

> *"What are the central ideas regarding the relationship between the state and the voluntary sector, and their respective, which are constructed within institutional messages over time*?"

National documents have been analysed by scholars working within a voluntary sector context (see for example Kendall, 2009) but this study is perhaps the first in the UK to use an institutional lens through which to identify the central logics underpinning the relationship between the sectors over time (1978-2014) and then use this analysis to illuminate the lived experience at the micro, organisational level, considering how the levels interact. This is important if we are to better understand the interplay between ideas at the national level, and ideas which are appropriated by individual actors

within their narratives, and therefore develop a better understanding of the active role that actors within Local Infrastructure Organisations (LIOs) might be playing. Understanding this interplay is also useful when exploring the agency of organisational actors; that is how actors are proactive in the way in which they engage with ideas, rather than simply reflecting the ideas which prevail at the societal level. It is through developing a better understanding of the ideas present at the societal level that a subsequent study of individuals at the field level becomes particularly meaningful. The focus is not on 'policy transfer' or the mechanisms by which ideas and policies are transferred. This has been considered extensively elsewhere, not least in the work following that of Dolowitz and Marsh (1996) (see discussion in Benson and Jordan, 2011).

Through this chapter, a contribution to extant institutional literature is made through an empirically informed institutional interrogation of political eras between the late 1970s and 2015 in the UK. Existing studies have sought to interrogate political eras via the application of an institutional framework. For example, Coule and Patmore (2013) use extant academic literature in order to conceptualise the institutional logics which dominate distinct political eras, but fall short of engaging with source material (such as national government documents) in developing this conceptualisation. This study extends this work, by developing an *empirical* basis for an institutional interrogation of political eras in the UK. In developing this empirical base, existing scholarly work is developed through the discursive analysis of national documents - comprising government-authored policy and discussion papers, papers authored by parties in opposition, and national review documents authored by independent committees – in order to surface the institutional logics (belief systems and associated practices) which underpin the dominant institutional messages of political eras over time.

A second contribution made within this chapter is to surface and discuss the degree of institutional complexity which is constructed and communicated via national documents. Much extant institutional work explores how a single dominant logic is replaced by another dominant logic (Zilber, 2011). However, this discursive analysis enables the complexity of the institutional environment, within which voluntary sector organisations are operating, to be illuminated. This is the first, and necessary, empirical step which will then enable a consideration of how individual organisational

actors engage with institutional complexity. This particular phenomenon has received little attention in extant literature (for exceptions see Battilana and Dorado, 2010; Pache and Santos 2010; Kodeih and Greenwood, 2014), but is of central importance if we are to better understand the nature of the institutional context which is constructed and conveyed by the central state within national documents.

A further contribution made within this chapter is to consider the ideational changes, or logic shifts, in national documents over time. Voluntary sector scholars have considered aspects of policy change over time. For example, Kendall (2009) explored the 'hyperactive' policy environment in the UK, looking at the process of policy formation, and those involved in influencing policy. Within this work he discusses the shifting policy environment over time with regard to the voluntary sector, but this work does not go into the level of detail which is afforded by a discursive analysis. In attending to the language of the documents, this study is able to demonstrate how language is used within these contexts in order to effect and enable a shift in logics, i.e. it attends to *how* ideas change, rather than simply *observing* the change.

This study builds on Kendall's work, through its focus on ideas, and *ideational* consistency or change. Hall (1993) called for more temporal studies, as he highlighted the considerable gap in studies of policy ideas and how they change over time, relative to snap-shot and international comparison studies. Although this study is not restricted to policy documents, a consideration of a wider range of documents can illuminate the ideas that are present during an era, as other documents such as discussion documents, scrutiny documents and white papers all reveal something about the ideas which form the discursive currency of an era. As Hall (1993) suggests, those working in the realm of the national state operate within "the terms of a political discourse that are current in the nation at a given time" (Hall, 1993: 289). It is therefore not only policy which may be considered representative of its context, but a broader range of documents will also tell the ideational story of their era. What is not considered here is the growing role of Europeanisation and globalisation in the evolution of policies, which are considered extensively by scholars such as Kendall (see Kendall and Anheier, 2011).

This chapter thus presents the ideas which characterise the role-identity of the voluntary sector, the role-identity of the state and the relationship between the two, across three political eras spanning 1979 to the present day. These three categories were identified in order to provide a focus for the discursive analysis, and were considered appropriate as they form the focus of the overarching study. Because this is an analysis which seeks to surface the characteristics of the overarching institutional logics of an era, the study will be particularly interested in belief systems – goals and values of a population of organisations - supported within the ideas conveyed within documents, and the associated practices – or the ways in which organisations should pursue the goals and values (Coule and Patmore, 2013). Following the presentation of the analysis, a summary table will be presented which brings together the central belief systems and associated practices which have been surfaced through the detailed discursive analysis (see table 4.3 of this chapter).

This chapter begins with a discussion of how the documentary analysis was approached within the context of a study of ideas. This discussion is intended to briefly frame the subsequent empirical work, not stray into methodological issues, which were explored within the Methodology (Chapter 3). The discussion then turns to consider how the examination of ideas can contribute to an institutional framework of analysis. The chapter then presents how I used key theoretical concepts, and how these concepts in turn enabled the ideational interrogation of national documents. The presentation of the empirical work then follows, exploring how the individual documents can be understood as institutional messages, constructing and conveying institutional logics via the ideas they contain, and thus telling us something about the institutional context of the document. This discursive analysis provided the empirical base for understanding how institutional logics shift, or remain constant, over time, and how surfacing the individual ideas within documents can shed light on this process.

4.1 Studying national documents as institutional messages

This study explores ideas and the discursive techniques used to communicate ideas. The institutional lens adopted helps to illuminate the ways in which documents convey the ideas which frame the relationship, in particular the role-identities assigned to the state and the voluntary sector. Such an approach considers the role of ideas in institutional processes.

When first exploring aspects of institutional theory, the starting point was a consideration of 'Discursive Institutionalism' as a framework for analysis (see Schmidt 2008). Discursive institutionalism is a strand of institutional theory which considers how ideas enter policy, and are conveyed through policy, leading to institutional change (Schmidt, 2008). Although it focuses on the processes through which policy ideas are constructed, discursive institutionalism did not provide a framework for analysis of the reception and impact of ideas at the organisational level. And whilst the sources of ideas, and how ideas enter the policy realm, are factors which would be fascinating to explore in more detail, they are points which are beyond the scope of this particular study. The focus was instead on the 'flow' of ideas between national documents and individual organisations and the actors within them, and thus the initial question for the empirical work was not *how* and *why* ideas enter national documents, but how ideas are conveyed and what this achieves in terms of establishing an institutional context. The question that follows is how the ideas in documents might represent such organising forces, which constrain the practices and identity of actors within an organisational field (Philips et al, 2004)? In considering the ideas at policy level, the suggestion is that ideas 'institutionalise' (Schmidt, 2008).

In order for this 'institutionalising' process to take place, ideas must be coherent to the target population, which means that they must convey something which is both comprehensible and plausible to their audience, from the very conceptualisation of the problem to be solved through to the means of solving it (Hall, 1993). A central way in which such ideas are rendered coherent is if they appeal to a "value or belief which is central to a society's cultural repertoire" (Beland, 2009: 706). Such a set of 'values and beliefs' is conceptualised within this study as an 'institutional logic' (Coule and Patmore, 2013; Friedland and Alford, 1991; Reay and Hinings, 2005; Thornton and

Ocasio, 1999), and the ideas and documents which convey logics are considered institutional messages (see Lammers, 2011).

This study engages the concept of the institutional message as a way of understanding the role that national documents play within the relationship between the state and the voluntary sector. The 'institutional message' is a concept which is defined by Lammers (2011) as "a message created in an interorganizational environment that transcends particular settings, interactants, and organizations" (p167, referencing Lammers and Barbour, 2006) and "a collation of thoughts that takes on a life independent of senders and recipients" (p171). Based on these definitions, this study takes national documents, such as policy texts, to be institutional messages, which once published, do indeed transcend individual organisations and settings, and are read and understood independent of the particular 'sender', i.e. the publishing department. Such documents, I suggest, do indeed play a part in constructing or conveying the ideas which represent some of the guiding principles of a group of organisations such as the voluntary sector. These guiding principles can be understood as institutional logics, which are "the organizing principles guiding field participants", and refer to a "set of belief systems and associated practices" (Reay and Hinings, 2005: 354), which are invoked in the policy context in order to serve a purpose; define a problem and justify a course of action (Dacin et al, 2002). Another way of explaining logics is that they are a set of rules that affect how and why actors within a field behave and make decisions (Marquis and Lounsbury, 2007).

The concept of the institutional logic therefore became central to this study as it evolved. As the research project sought to understand how national documents might perform a role in establishing and communicating beliefs about, for example, public service delivery, and the role of the voluntary sector within this field, the institutional logic was a concept which provided a theoretical underpinning to how this process might be happening. However, although it has been suggested that the concept of the institutional logic allows for a degree of empirical interrogation, providing as it does a method of analysis (Thornton and Ocasio, 2008), when attempting to examine in detail how documents construct and convey particular logics, the study needed to explore individual ideas, and how they were conveyed. When considering the questions of

how logics are constructed and communicated, the concept of the 'institutional message' becomes useful (Lammers, 2011).

The notion of the institutional message was proposed as a way of enabling empirical access to the study of institutional theory in terms of exploring the interconnections, which are often proposed but rarely demonstrated empirically, between different levels of analysis, from the societal through to the micro level (Lammers, 2011; Thornton and Ocasio, 2008). Within this study, the 'institutional message' is a useful starting point when considering how ideas presented through documents can be considered institutional markers, or points which guide the audience to align with particular institutional logics. Understanding national documents, such as policies, created by the government departments to be institutional messages, then provides a framework through which to explore the relationship between such messages, the logics they construct and convey, and the reception of such messages at the micro level. This is essentially the process which this study seeks to illuminate.

If we understand institutional messages to be collation of thoughts, or ideas, then the discursive analysis of national documents surfaces the way in which messages are created and conveyed through discursive devices. However, using the concept of institutional messages does introduce an existing debate (see Hardy, 2011; Lammers, 2011; Suddaby, 2011) which considers the relationship between institutional messages and institutional logics. This debate will be explored in brief, due to its bearing on this thesis, and the way in which this thesis extends the extant debate.

One understanding of the concept of institutional messages is that they take on a life of their own, transcending the original 'sender', and taking form in the interorganizational environment (Lammers, 2011). A key problem with this understanding of the institutional message, and one which certainly poses problems for this study is the way in which this understanding infers a causal relationship between messages and institutional logics, with institutional logics *creating* messages, thus assigning agency to institutions (see Suddaby 2011). A counter argument to this is that the causal relationship should be inverted, suggesting that "one might argue that patterns of communication determine social institutions" (Suddaby, 2011: 5) and that institutional messages might actually be considered *sources* or *determinants* of

institutional logics. This suggestion supports the idea that communication patterns help to shape institutions and effect the direction of institutional change. This challenge is supported by the suggestion that we should interrogate how processes of communicating can serve to institutionalise (Hardy, 2011), thus supporting the shift in causal relationship.

A further problem with understanding that institutional logics in effect create institutional messages concerns the idea of agency, both of institutions (Suddaby, 2011) and of the messages themselves (Hardy, 2011). It has been suggested that, in assigning agency to such concepts, extant work "essentializes institutions" (Suddaby, 2011: 3), and therefore falls back into a central issue within neo-institutional literature where:

> *"Human agency is subordinated to ambiguous and shadowy social constructions - that is, institutions and institutional logics - and the individual disappears"* (Suddaby, 2011: 3).

Instead, it has been suggested that messages are only rendered meaningful by the process of communication between those who send and those who receive messages, thus assigning agency firmly to those agents, or individuals, involved in the communication process (Hardy, 2011). This disagreement within the extant institutional literature will help to frame the discussions towards the end of this chapter, and will therefore be returned to on pages 107-108. However, in terms of considering the approach taken within this study, this debate certainly prompts more nuanced consideration of the role assigned to ideas within national documents, and whether in fact a causal relationship (logics create messages or vice versa) is being interrogated. It is important to state that the suggestion that documents can be understood as institutional messages, which do convey institutional logics, does not necessarily infer a causal relationship. This will be discussed further towards the end of this chapter when the analysis has been presented.

When considering the political context within which voluntary sector organisational actors exist and act, it follows that a shift in political administration might lead to a shift in the set of ideas which underpin an administration. Such shifts would appear within the discursive framework of national documents such as policies (Beland, 2009).

It is through an interrogation of the 'belief systems' to which documents appeal that this study attempts to explore the characteristics of the overarching logics of an era.

Although it would be neat to suggest that actors are operating in one context and thus responding to one set of ideas supporting one overarching logic, it is important to consider at this point the 'messiness' of the context which I am exploring. There are in fact multiple institutional contexts, and therefore organisational actors can be considered to be responding to multiple, and at times, conflicting, logics simultaneously (Friedland and Alford, 1991; Townley, 1997). It has been suggested that actors with relatively little obvious 'power' can draw upon competing institutional logics to achieve specific outcomes (Coule & Patmore, 2013), but it is also useful to consider how *national documents,* such as policies, draw on contrasting, and at times competing, institutional logics in order to communicate a political administration's position in relation to other actors in the field.

Townley (1997) suggests that organisations operate under different institutional logics, as individual logics alone (for example, relating to political, economic or social organising principles) "do not provide the repertoire available to contest concepts of legitimacy" in other institutional spheres (Townley, 1997: 264). In other words, different logics are at play within an organisational context, and these are responded to in different ways by organisational actors. The crafting of a national document, in order to convey the full range of ideas required by a particular aspect of policy, may therefore be similarly drawing on different logics in order to paint the complex institutional picture which an administration considers coherent with its approach. National documents contain ideas which render coherent a particular course of action for those individuals and organisations that would be considered the targets of such documents (Beland, 2009). The messy and conflicting nature of the institutional context is in part explained by the temporal view of institutions. Viewing the institutional context over time brings into focus the way in which logics shift, and become overlaid with new logics, in effect creating a complex landscape where contrasting and competing logics sediment upon each other (Cooper et al, 1996).

Interestingly, it has been suggested that message creation should in fact be considered a form of institutional work (Suddaby, 2011) or "intelligent, situated institutional

action" (Lawrence and Suddaby, 2006: 219), which would therefore allow for communication practices to determine institutional logics (Suddaby, 2011). By suggesting that national documents invoke central institutional logics which guide actors within the voluntary sector on, for example, how they should be engaging with the service delivery agenda, this lens will enable discussions in subsequent chapters, to consider how organisational actors themselves interact with these institutional logics via the process of identity work. The idea of institutional work (in particular in the form of identity work) is returned to in Chapter 6 in the exploration of the micro level empirical analysis which formed part of this study. This study is based on the premise that agency must be considered a central aspect of the institutional process. The progression of this work to then consider narratives of organisational actors will enable the interplay between the societal and micro contexts of organisations to be considered.

Returning to consider the documents themselves, it is important to acknowledge the role of the documents, and how they are being 'treated'. Documents, for the purposes of this study, are being considered expressions of the ideas prevalent within a particular era. Whilst the formation of the documents is not being scrutinised, caution must also be taken so as not to assign agency to the ideas themselves. Recognising the 'power' of ideas, as they are communicated through documents such as those chosen here, acknowledges that the ideas were crafted by agents within a specific time and context.

Although the scope of this study did not allow in-depth consideration of those processes through which agents were involved in document creation, in order to go on to consider the interplay between this societal and micro levels of ideas, the analysis does briefly consider the source of the documents and reflect on some issues relating to their temporal context. In this way, the documentary analysis enabled a surfacing of institutional logics, and thus creates an institutional picture of an era. Such an analysis enables examination of the interconnections between different levels of analysis, (Lammers, 2011; Thornton and Ocasio, 2008).

This study considers the State as an entity with numerous constituent parts, and looks beyond the boundaries of policy, in order to consider a wider spectrum of documents

produced by state actors. The list of documents analysed (see Table 3.2 in the Chapter 3 for a full list of documents) includes the following document categories: white papers; government progress report; a service 'scrutiny' or 'review' of aspects of the state's activities in relation to the voluntary sector; frameworks setting out government's aims for aspects of its activities; action plan outlining proposed government activities; strategies or discussion papers; partnership agreement or concordat.

It is clear from this list that the range of documents were created to perform different functions. However, the motivation for undertaking this analysis was to understand more about the "institutional attitude" (Lammers, 2011: 168) of state actors during distinct political eras by exploring the beliefs and associated practices conveyed through institutional messages. It has been suggested that the government's orientation towards the populace can be understood by exploring the institutional messages created by government actors (Lammers, 2011). It was in order to develop this understanding, and paint this institutional picture which would frame the analysis at the organisational level, that the documentary analysis was conducted.

In addition to the national government documents which were analysed, three documents which were not authored by government departments were brought into the analysis. This is because of the significance of such documents which review the position or role of the voluntary sector and its relationship with the state from a vantage point beyond a government department. Such documents also shed light on the significance of ideas at the societal level (see for example 6 and Leat, 1997 in their discussion of the significance of independent review documents such as Wolfenden, 1978, and Deakin, 1996). When setting out to explore the nature of the relationship between the state and the voluntary sector, a consideration of national documents can be a useful way of discovering how the relationship is framed and presented linguistically at a national level (see for example Alcock, 2010; Kendall 2009). The ideas presented at this level illuminate one aspect of the relationship, from the perspective of national state actors (Beland, 2009).

A detailed, discursive examination of these documents also allows an in-depth analysis of *how* government uses the medium of the national document (whether that is policy,

service review or green paper amongst others) as institutional messages, i.e. how such documents convey ideas. The linguistic choices made can impact upon the way in which ideas are received, with language choices potentially affecting the choice of target audience, for example, and the way in which ideas are presented as continuations with previous agendas, or as fresh concepts which break with preceding eras (Campbell, 2002).

Before developing a discussion of how organisational actors *engage* with logics, and how ideas might be contested, it is first necessary to explore the logics themselves. The detailed analysis of national documents, as vehicles for and constructions of institutional logics, is therefore a necessary first step in understanding the role that ideas play in the relationship between the voluntary sector and the state.

4.2 Documentary analysis

The discursive analysis of national documents enabled the exploration of the presentation of the state, the presentation of the voluntary sector, and the presentation of the relationship between the two. When considering how the documents presented the sector, the analysis surfaced the kind of beliefs, as well as the associated practices to which the documents referred or alluded. Although the terminology within the analysis does not always refer to 'beliefs' or 'associated practices', a summary table of these central characteristics is contained in Table 4.3, within the discussion which concludes this chapter.

This section presents the empirical work which came out of the discursive analysis of national documents. The presentation of the data is structured by political era, which renders it coherent in terms of uncovering the shifting nature of institutional logics over time. This temporal structure also presents the critical role that transitional documents play in this shifting institutional context. This analysis will start with the first of these transitional documents, the report of the Wolfenden Committee in 1978, which is followed by discussions relating to each political era, and its preceding 'transitional document'.

4.2.1 The transition to the Conservative political era of 1979-1997: the Wolfenden Committee's Report as a transition document

This analysis will take the first of these transitional documents as its starting point, which is a review of voluntary organisations which was undertaken by a committee chaired by Baron Wolfenden, entitled 'The Future of Voluntary Organisations', published in 1978 (hereafter referred to as 'Wolfenden report'). This committee was established to be independent of government, initiated by what is now known as the National Council of Voluntary Organisations (NCVO). Represented on this committee were academics and other 'intellectuals' (6 and Leat, 1997) from a variety of disciplines who were considered to add weight and credibility to the review process. The review was funded by the body which is now known as the Joseph Rowntree Foundation.

This document represents a particularly useful starting point, as it is the first document which takes as its focus a review of the role of voluntary organisations and their relationship with the state (6 and Leat, 1997). It has been suggested that this document is instrumental in initiating the process of casting voluntary actors as a homogenous sector, despite the contradictions posed by undertaking such a review, whilst within the document questioning such a grouping (6 and Leat, 1997; Alcock, 2010).

As the first such review, it provides an insight into the way in which voluntary organisations, state agencies, and the relationship between the two, are characterised. As a review, it establishes itself as a document at once looking back, presenting an historical account of the state-sector relationship through time, and explains the present context through which the sectors relate to one another. It also presents a critique of its present context, suggesting recommendations for change. Therefore, unlike a document created by the governing administration, it is positioned as an independent review, casting a critical eye over the recent past and present. It is through these linguistic characteristics that this analysis has surfaced the ideas which characterise this era.

The Wolfenden Report marks an impending transition between one political administration and the next (6 and Leat, 1997). Such 'transition' documents (Alcock and Kendall, 2011) are useful indicators of possible movement in thinking regarding

how the state characterises itself, and other actors in society. The document is critical of the powerful, overbearing position of the state. This stance is in agreement with the incoming Conservative administration, which stated that the Labour administration had been wrong to accumulate power centrally, taking on roles that were better suited to non-state actors and indeed individuals (Lewis, 1999).

The central characteristic of the relationship between voluntary organisations and the state, which is conveyed through the Report of the Wolfenden Committee, is that of 'extension ladder', with the work of voluntary organisations considered as an extension of state activities. The report is clear that the activities of voluntary organisations "are complementary" (Wolfenden, 1978: 62). The recurring identity assigned to voluntary organisations is that they are important, but supplementary; services are predominantly planned and delivered centrally by the state with other providers delivering additional or peripheral services (Coule and Patmore, 2013). For example:

> *"Although the voluntary system, as we have shown, was once the chief form of collective action outside the Poor Law, it can now best be seen in terms of the ways in which it complements, supplements, extends and influences the informal and statutory systems"*
>
> (Wolfenden, 1978: 26)

And:

> *"In this and other Ministerial speeches it has been stressed that there is a need for voluntary services complementary to those provided by the State"*
>
> (Wolfenden, 1978: 61)

As part of this presentation of the relationship between the state and voluntary organisations, the report also presents ideas which help to define each sector. The state is presented using language conveying ideas of dangerous excess and control, of being "monolithic" (27) and overbearing, in danger of stifling the contribution of others. It recommends that the state should reduce its powerful "monopoly" (27), ceding some of its influence to voluntary organisations.

That this document is in part looking back, describing and critiquing the era leading up to its publication, is an important aspect of its transitional function. The document

was produced in order to review and recommend changes. Coming at the end of a centrist Labour administration wherein the state was dominant (Giddens, 2003), the document marks a shift away from some of these ideas. These critiques of central, state power discursively support the shrinking, or rolling back the state, and opening up opportunities for those outside the state structure to contribute, albeit within a framework set by the state. This is consistent with the ideological approach of the subsequent political era, in which the Conservative administration sought to reduce state involvement in direct service delivery (Crowson, 2011).

Coupled with this, the document's depiction of voluntary organisations embeds the belief in the identity cues of virtue, and endurance. Such ideas are reinforced through references to the normative qualities with which the sector has since become synonymous (Billis and Glennerster, 1998; Etzioni, 1995; Morris, 2000). The independence and spontaneity of the voluntary sector is celebrated, as well as its ability to support participation in the design of community services. For example:

> *"The principle benefits attributed to the voluntary sector in this sense relate mainly to its potential as a means of enabling widespread direct public participation. In the modern industrial state, dominated by large-scale political, economic and social institutions, most people have little opportunity to shape the society in which they live. The voluntary sector offers the possibility of direct involvement"* (Wolfenden, 1978: 29)

The document suggests that voluntary organisations have closer links to beneficiaries, as well as being a site for innovation. Via these linguistic devices, this document positions the sector as an ideal, if supplementary, deliverer of services, and sets it in sharp contrast to its depiction of an oversized, immovable state. These ideas help to form identity cues relating to the potential role the voluntary sector could play in society. For example, the document presents the state's central delivery of services in the following way:

> *"...virtually in a monopoly position. They are subject to all the risks of bureaucracy, inflexibility and resistance to innovation that similarly placed organisations in other sectors of society exhibit"*
>
> (Wolfenden, 1978: 25)

In contrast, the document presents voluntary organisations as *"the setting for innovation"* (Wolfenden, 1978: 26), as well as being *"dedicated"* and fulfilling a

"pioneering role" (Wolfenden, 1978: 61). These ideas combine within this document to form identity cues which are coherent with 'enduring voluntary action' characteristics. This message is casting forwards, looking to the next era whereby changes to the role of both the state and the voluntary sector could be possible.

The critique of the preceding era, as explored above, and the presentation of new ideas, reflects a shift in the predominant overarching institutional logics to which the next political era would be aligned. At this moment of transition, the Labour administration was approaching the end of its term, and the political context is on the cusp of a new Conservative administration, which is an important contextual feature. The ideas presented within this document at once look back and offer a critique of what has gone before, whilst making recommendations for change in the future.

The effect of this critique is that it creates space for new ideas to come to the fore. This has been described by Hardy and Maguire (2010) as the opening up of a 'discursive space'. This analysis therefore highlights the important role that such 'transitional documents' have in creating discursive space within which new ideas can be introduced. The role of this independent committee is particularly interesting, as it demonstrates the important role that this independent grouping had on creating discursive space for a shift in political ideology as a new era approached.

It is to this next era, that of the Conservative administration, which this discussion will now turn. Following on from this transitional document, the new administration's institutional messages present a series of shifts in the dominant, overarching institutional logics, presented through ideas which position this administration in terms of its departure from the era which preceded it.

4.2.2 Institutional logics conveyed through institutional messages of the Conservative administration 1979-1997

This section will now consider the Conservative era of 1979 to 1997, focusing on two documents which were produced by departments of this administration; the Home Department's White Paper, 'Charities: A Framework For the Future', and the Home Office's scrutiny report, 'Efficiency Scrutiny of Government Funding of the Voluntary Sector'. The reason that only two documents were considered for this era is based on the limited documents which were produced which take the voluntary sector as the

focus. Below is the data from within these documents, which tell the story of the overarching institutional logics of this era. The characteristics of the logic are unpacked in the left hand column, with supporting data in the right. Following this table, the discussion surrounding this data is presented.

TABLE 4.2.2: Characteristics of logics, Conservative Administration, 1979-1997

Characteristic of the logic	**Data from documents communicating characteristics**
Role-identity of the state: Rolling back the state - the state should set the framework for activity but remain at arms-length and reduce its direct delivery	"[The government] believe[s] it would be wrong to seek to impose upon the voluntary sector any central direction. Indeed this would not be possible without damage to its spontaneity and diversity" (Home Dept., 1989: 2) "The Government must, however, help to provide a framework within which voluntary bodies can *flourish*..." (Home Dept., 1989: 2, 1.8)
Role-identity of the voluntary sector: Enduring voluntary action - voluntary action is historical, represents a deep-rooted human impulse, and organisations have qualities which are understood	"The impulse to help others in need or distress, or to join with them for some common purpose, is deeply rooted in human nature" (Home Dept., 1989: 1) "Individuals and groups can act more flexibly than central bureaucracies and can spot and fill gaps in provision more quickly" (Home Dept., 1989: 1) "distinctive contribution – flexibility, vitality, ability to generate ideas" (Home Office, 1990: 15) "able to get closer to the customer; innovative and able to respond to new needs; able to work in a wide range of fields;"; "able to operate at less cost than Government"; "manage to make a small amount of money go a long way", "highly motivated" (Home Office, 1990: 6)
State-sector relationship: Separate spheres - the sectors should work together but allow distance and non-interference by the state into the workings of voluntary organisations	"[The government] believe[s] it would be wrong to seek to impose upon the voluntary sector any central direction. Indeed this would not be possible without damage to its spontaneity and diversity" (Home Dept., 1989: 2) "The Government must, however, help to provide a framework within which voluntary bodies can *flourish*..." (Home Dept., 1989: 2, 1.8)

As the Conservative administration of 1979-1997 progressed, there is a shift of emphasis which underpins the relationship between the sectors. The messages of the 'extension ladder' relationship have been superseded to a degree by the emerging 'separate spheres' message. This replaces the notion of the supplementary activities of the sector, by suggesting that the activities of voluntary organisations are at risk from an overbearing state. The state should therefore step-back from the sector and allow it to flourish independently.

Such ideas echo the warnings referred to within the Wolfenden Report of the dangers posed by the state being too powerful. In this instance, the ideas within the Wolfenden Report prepared the way for the subsequent logic shift. Presented within a white paper, these ideas introduce the dangers posed by an over-involved state as an aspect of the context from which this administration will form policy. It is suggesting that this danger must be averted by the policy ideas presented.

Messages alluding to the 'extension ladder' relationship haven't necessarily disappeared altogether, as we see references to the "complementary relationship" and the need for the voluntary sector to work "hand in hand with mainstream services" (Home Dept., 1989: 1). However, the predominant ideas are that of independence, and arms-length operations.

During this era, the central position of the state starts to give way to messages supporting 'rolling back of the state' (Billis and Harris, 1992; Lawrence, 1982), which sees elements of the neo-liberal ideology taking hold (Crowson, 2011) and market principles coming to the fore. This stepping-back of the state is premised on an ideology of reducing direct service delivery by the state, enabling voluntary sector organisations to become more involved in delivery of state services, as outlined in this extract from the 'Efficiency Scrutiny of Government Funding of the Voluntary Sector' (1990):

> *"Departments should look actively at the scope for using voluntary bodies as agents to deliver services which are currently provided by statutory authorities"*
>
> (Home Office, 1990: 15)

Embedded within a scrutiny document, such a recommendation is premised on the review of current practice, and framed therefore as a way of improving the efficiency of government activities. However, this idea of making greater use of voluntary organisations is tempered by the suggestion that applying strict purchasing arrangements on external delivery agents would prove problematic for those organisations, and the way they deliver services. For example:

> *"The essence of the voluntary sector is its independence. Strict purchasing arrangements may not enable a Department to capitalise on the initiative and enthusiasm of the voluntary sector, or to gain added value from volunteer effort and contributions from other sources"*
>
> (Home Office, 1990)

The warnings applied to this shifting relationship are aligned with the characterisation of the voluntary sector during this era. The references in the extract above to "initiative and enthusiasm" are consistent with numerous similar characterisations of the voluntary sector, and voluntary action during this Conservative administration of 1979-1997, labelled within this study as characteristics of 'enduring voluntary action'. Voluntary activity is presented as a central tenet of being human, for example:

> *"The impulse to help others in need or distress, or to join with them for some common purpose, is deeply rooted in human nature"*
>
> (Home Dept., 1989)

Documents of this era also list the many attributes of voluntary organisations, which have come to be recognised as being synonymous with voluntary endeavour. For example, organisations are described as making *"distinctive contributions - flexibility, vitality, ability to generate ideas"* (Home Office, 1990: 15), and being better able to *"fill gaps in provision more quickly"*, and provide services which are *"better tailored to individual needs and be more personal"* (HMSO, 1989: 1).

We can see, therefore, how the ideas presented via institutional messages of the Conservative era up to 1997 support some subtle shifts from ideas of the previous era which are referenced within the Wolfenden report. Whilst the shifts are subtle, and have links to previous eras, there are important changes alluded to which tell us something about the shift in the political approach to the voluntary sector, the state and the relationship between the sector and the state. The institutional messages

suggest a reduction in state service delivery, a more arms-length relationship with the voluntary sector, whilst at the same time recognising the additional role some organisations could play in the delivery of statutory services. The ideas used to frame voluntary action are consistent with those presented in the Wolfenden report, and carry a degree of familiarity and therefore coherence.

The penultimate year of the Conservative administrative era saw the publication of the second transition document, and it is to the analysis of this document which the discussion will now turn.

4.2.3 The transition to the next political era: the Deakin Commission's Report as a transition document

As with the Wolfenden report, which was published towards the end of the Labour administration (1978), a similar review of the voluntary sector was once again conducted as the Conservative administration (1979-1997) was coming to an end. The Deakin Commission was independent of government and comprised a grouping of academics and voluntary sector practitioners. It published its report, 'Meeting the Challenge of Change' in 1996, and some of the central ideas contained within this document called for a shift in the predominant logics underpinning the relationship between the sectors, as well as the position and role-identities of the sectors themselves. As with Wolfenden, this document can be considered a transitional document as it heralds some of the ideological shifts which in turn create space for a discursive shift of the institutional logics which are prioritised.

A series of ideas are introduced within this comprehensive review, which combine to support a shift in dominant logic which would go on to underpin the relationship between the two sectors for much of the New Labour administration (1997-2010). The institutional message of the previous era had conveyed a context of 'separate spheres' within which the state and the sector should exist, acknowledging the importance of the voluntary sector operating independently, and without interference from state agents. However, the ideas conveyed through the report of the Deakin Commission included the promotion of a close partnership between the state and voluntary sector, and outlined the idea of an agreement between the sectors, formalising the close relationship and outlining how the two sectors should behave:

> *"We believe that to give real meaning to the term 'partnership' central government must recognise the legitimacy of the voluntary sector's diverse roles and its own responsibility to promote a healthy sector as a major element in the democratic process. We would like to see a concordat drawn up between representatives of government and the sector..."*
>
> (Deakin, 1996: 3-4)

The partnership idea is embedded through further references which outline how this new relationship should be taken forwards. For example:

> *"Successful partnership as defined in our principles offers new opportunities for the voluntary sector to make their distinctive contribution to the future of society"* (Deakin, 1996: 14)

The emergence of these ideas suggests a new framing of the relationship: that of the 'partnership' between the sectors (Alcock and Kendall, 2011; Lewis, 2005; Taylor and Warburton, 2003). It is proposing a closer relationship, which although should retain the independence of the sector, should also mean that voluntary groups "work with the grain" (Deakin, 1996:13), i.e. in line with the overall direction-of-travel of the state. In marking a departure from one set of ideas which had framed the state-sector relationship, and introducing a new set of ideas, this document is effectively creating discursive space. In the space created by shifting away from pre-existing ideas, a new conceptualisation of the relationship between the state and the voluntary sector can be put forward. This new conceptualisation marks a shift away from the discourse of 'danger' posed by such a close alliance, and thus enables a new union to be imagined. Once again, the role of the transitional document here is to shift away from one set of ideas, and pave the way for a new era, and the characteristics of a different institutional logic, including the role-identities of both the state and the voluntary sector, which would come to dominate the era to follow.

The report not only alludes to a shifting relationship between the two sectors, but also characterises the state in a new light which would make it a better, closer partner to voluntary organisations. For example:

> *"Voluntary organisations in their turn should recognise that substantial changes have now taken place in the internal structure and management of central government, which is now neither monolithic nor static."*
>
> (Deakin, 1996: 4)

The Deakin Commission's direct reference to the Wolfenden Committee's Report, and its characterisation of the "monolithic aspects of statutory provision" (Wolfenden, 1976: 27) demonstrates the degree to which this second transitional document being considered uses the first transitional document as a reference point. In so doing, it is able to measure distance travelled, both in terms of the role of the state but also the relationship between the state and the voluntary sector.

This report does not abandon the idea of 'rolling back the state' entirely, but by suggesting that the state has developed its capacity to act, alongside the suggestion that a close partnership between the sectors should be developed, it can be suggested that the characteristics of a new institutional logic underpinning the role and position of the state is appearing; that of 'primacy of the state'. The state linguistically moves back into centre stage, albeit with a close partner emerging in the form of the voluntary sector. This aligns with the centrist tendencies of a Labour administration's ideology, if a weaker version than previous Labour eras, as the role of the state is more limited than under previous Labour administrations (Haugh and Kitson, 2007).

Whilst this report ushers in ideas which suggest role-identity shifts, concerning both the way we see the state, and also the way in which we understand the relationship between the two sectors, the characterisation of the voluntary sector remains consistent with that of previous eras, supported by ideas conveying the numerous qualities of voluntary sector organisations, and the increased role they could play in civic life, and importantly, service delivery (Lewis, 2005).

For example:

> *"Yet at the core there is something distinctive which is of vital importance for the future of our society. That is the contribution that is being made to the well-being of this society which takes place outside the confines of the state and the market. We make it both as individuals and collectively."*
>
> (Deakin, 1996: 16)

However, in addition, this transition document does start to introduce the expectation that the sector should consider working with private sector partners to a greater extent. Such a shift introduces an idea which the subsequent administration, coming to power the following year, must respond to. This again marks the important role of such a transition document, creating discursive space by distancing itself from the

ideas of the present era, and introducing ideas which echo established Labour party political ideology, albeit embedded within 'new' ideas. This paves the way for a subsequent shift in ideas and thus the institutional logics underpinning the next administrative era.

It is to this subsequent administration that this discussion will now turn, in a consideration how the institutional messages within this new political era realise some of these shifts introduced by this transitional document.

4.2.4 Institutional logics conveyed through the institutional messages of the New Labour administration 1997-2010

The section which follows will consider the institutional messages of the New Labour administrations, an era from 1997 to 2010, and in particular a range of four documents produced within this era by different government departments. These are the Treasury's 'Cross Cutting Review' in 2002, the 'ChangeUp' framework produced by the Home Office in 2004, a Cabinet Office Action Plan, 'Partnership in Public Services', and finally, a discussion paper produced by the Department for Communities and Local Government in 2007, 'Third Sector Strategy for Communities and Local Government'. It is important to note that four documents are considered, compared to two documents in the Conservative era considered above. The reason that more documents are considered is due to this era being more prolific in terms of the number of documents published.

Below is a table which presents data from the above documents, illustrating the shifting logic characteristics within this era. Following this is discussion exploring this data and what it conveys about the institutional attitude (Lammers, 2011) of the government administration within this era.

TABLE 4.2.4: Characteristics of logics, New Labour Administration, 1997-2010

Characteristic of the logic	Data from documents
Role of the state: Weak state primacy with market rationality - the state has a central role, but wants to increase competitive processes through market development	"The Government regards the third sector as a key partner in a mixed economy of public service provision, alongside the public and private sectors", (Cabinet Office, 2006: 8)

Role of the sector: Community Empowerment obligations - the sector has a role to involve people in civic life, and enable voices to be heard by decision-makers	"Voluntary and community organisations...are often uniquely placed to reach marginalised groups and enable individuals to participate actively in their local communities" (Treasury, 2002: 5) "Frontline organisations also provide channels through which people can articulate their views to Government and other agencies" (Home Office, 2004: 12) "I value the sector's role as an advocate and campaigner for individuals and groups who need a stronger voice in our communities; as a catalyst for cohesion between communities because it is trusted and can form those vital links to bring people together; and as a force for social justice and tackling inequalities", (DCLG, 2007: 4)
Role of the sector: Weak market rationality - the voluntary sector has a responsibility to improve its performance	"Frontline organisations should be better able to improve the performance of their organisation" (Home Office, 2004: 8) "to develop and modernise infrastructure services.... to increase their effectiveness" (Home Office, 2004: 16) "the third sector has a role in making its contribution visible. As a starting point, organisations need to be able to demonstrate the benefits of their approach, in order to enter into a meaningful discussion about how they can be recognised and rewarded by funders and communities" (Cabinet Office, 2006: 23) "We believe that there is potential for us to enable the Third Sector to do even more" (DCLG. 2007: 9)
Role of the sector: Enduring Voluntary Action	"independent of government and therefore unequivocally on the users side" (Treasury, 2002: 16) "Third sector organisations often bring a range of strengths to the tasks of empowering users and promoting community engagement, particularly for those who may be distrustful of the state. They often have a personalised approach and public trust required to build services around the needs of users and to build their capacity" (Cabinet Office, 2006: 9) "It works with disadvantaged people and places and engages people in social and environmental challenges. It can help to strengthen cohesion by building bridges and bonds within communities. It provides voice and representation for citizens and communities" (DCLG, 2007: 11)

	"Value driven" (DCLG, 2007: 5)
State-Sector relationship: Partnership - the state and voluntary sector should work together, due to shared aims and visions for communities	"Our aim must be to build a new partnership using the sector's strengths to challenge and stimulate new ideas, complement our shared objectives and take forward the development of social policy generally. This partnership is about fresh ways of thinking through the role and structure of government and the voluntary sector and the way we deliver services" (Treasury, 2002: 3) "Together, government and the third sector can be partners in helping to change society. The positive attributes of the third sector are different from those of government, and the two sectors working together can achieve far more than either can achieve alone" (Home Office, 2006) "By working together we can add value to, and achieve, outcomes that neither might realise acting alone" (DCLG, 2007: 4) "Our ambition is for the third sector and the Department to have an effective and on-going relationship that adds value and helps achieve our common objectives" (DCLG, 2007: 11)

The political era of 1997-2010 saw a strengthening of the idea of 'partnership' underpinning the relationship between the sectors. The institutional messages marked a shift from promoting a close working relationship, to the idea of sectors sharing a joint mission to improve society and almost a joint responsibility for public services, as outlined in this extract from the Cross Cutting Review (2002):

> *"Our aim must be to build a new partnership using the sector's strengths to challenge and stimulate new ideas, complement our shared objectives and take forward the development of social policy generally. This partnership is about fresh ways of thinking through the role and structure of government and the voluntary sector and the way we deliver public services"*
>
> (HM Treasury, 2002: 3)

This review represented a critical point in the New Labour administration, early into its second term in government. Its purpose was to review the role that the voluntary sector could play in public service delivery. Publishing such a document demonstrated

this administration's direction of travel, and its ambition to galvanise a partnership with the voluntary sector. However alongside this ambition was the aim of developing the role of the voluntary sector in statutory activity (service delivery). The ideas of partnership are not static, however, as we see 'partnership' being used in different ways at different points in the administration.

Illustrating this, there is a subtle shift in the ideas embedded in messages of the 'partnership' between the state and the voluntary sector, as later documents start to suggest that the state needs to start becoming a better partner to the sector, in order to realise their collective goals. For example, early in New Labour's third term, the Cabinet Office published an Action Plan which outlined the plans for greater voluntary sector involvement in public service delivery, 'Partnership in Public Services', (2006) and in this document they state:

> "*This action plan, which complements the Cabinet Office's work on social exclusion and social enterprise, forms the next step in the Government's long-running commitment to ensuring that we work in equitable partnership with the third sector. It aims to make government a better partner for the sector, respecting its needs and understanding what it can bring*"
>
> (Cabinet Office, 2006: ii)

Whilst there are ideas conveying an embedded, strengthening partnership, there are also shifting ideas underpinning both the position of the state, and the position of the voluntary sector.

As well as conveying the strength of the partnership between state and the voluntary sector, a number of ideas start to be introduced to these institutional messages which subtly supports the primacy of the state within the state-voluntary sector relationship. Although messages of 'partnership' convey ideas of 'togetherness' between the state and the voluntary sector, ideas which position the state in control of this relationship are also appearing during this era. The state is establishing a framework, within which the voluntary sector can act, (HM Treasury, 2002), and is in control of the environment which supports the sector and its relationship with the state (Home Office, 2004). The State assumes the role of enabling and ensuring a successful voluntary sector. For example, a discussion paper outlining the Department for Communities and Local Government's strategy for the third sector includes the statement that:

> *"We are proud of what we already do to enable a healthy sector. We involve third sector organisations (and their umbrella groups) in shaping and designing our policies... the Local Government White Paper published last autumn, set out our clear expectation that the sector should be a key partner to local government"* (CLG, 2007: 5).

With the state in the active, powerful role, there is a patriarchal tone introduced which renders the sector as subject to the state and its ability to enable, nurture and support. The contextual factor, that both this discussion paper, and the preceding document discussed from the Cabinet Office (2006) were both published in the New Labour administration's third term, is useful to note, as the second and third term were considered to be more focused on delivery (Richards and Smith, 2004). A key debate stemming from such an ideational shift considers concerns that voluntary organisations during this era were offered partnership, but were still being conceptualised in terms of their relationship to the state (Lewis, 2005). This power imbalance introduces a contradiction with the strong partnership messages which are central to New Labour policies (Hodgson, 2004). This in turn illuminates concerns which have been expressed about the government of this era using the voluntary sector as a means of delivering their policy aims, almost co-opting voluntary organisations into the state (Craig et al, 2004; Taylor, 2012).

Such concerns were also considered within the context of the development of the Compact agreement between the state and the voluntary sector, and the dangers this posed in terms of such an agreement being a tool for coercion and control (Morison, 2000; Fyfe, 2005). The ideas of 'partnership' at times seems to contradict the messages conveying the 'primacy of the state', with the documents of this era at once presenting both an equal relationship, alongside the presentation of a hierarchy. This surfacing of contrasting, and at times contradictory messages, (such as the concomitant construction of ideas of partnership and state primacy) points to the institutional complexity (Greenwood et al, 2011; Kodeih and Greenwood, 2014; Zilber, 2011) which is be constructed and conveyed via the national documents within this era.

The characteristics of 'enduring voluntary action' continue to underpin the way in which the position and role of the voluntary sector are presented throughout the

documents of the New Labour administrative era. As has been consistent in the eras considered above, the qualities and values of voluntary sector organisations are conveyed, such as their capacity to reach marginalised groups (HM Treasury, 2002), their ability to work in a creative, innovative way which builds trust (Cabinet Office, 2006), and their key role in building cohesive societies, for example:

> *"The voluntary and community sector plays a crucial role in delivering public services and in building strong, cohesive and self-determining communities. Frontline organisations often work with those most at risk from social exclusion, providing help and support, and meeting multiple needs in ways which not only give citizens and users a voice, but also the means to tackle themselves the underlying causes of their problems"* (Home Office, 2004: 7)

The institutional messages supporting this consistent characterisation have shifted slightly in some of their detail, with an interest in the ability of the voluntary sector to build social capital (Fyfe, 2005; Kelly, 2007) and contribute to 'civil society' (Hodgson, 2004). Even with these subtle shifts, the overall consistency of these messages is demonstrative of the ongoing way in which voluntary action has held a particular position in society. This consistency of messages has been discussed in terms of rendering a set of ideas more coherent to its intended audience (Beland, 2009). The consistency of 'enduring voluntary action' characteristics therefore could be performing a key function of assigning a degree of coherence and therefore credibility to the ideas within these documents.

However, alongside the 'enduring voluntary action' characteristics, there is an alternative message which is presented through a number of the national documents of this era; 'market rationality'. This message is particularly prevalent within those documents which deal with the role of voluntary organisations in the delivery of public services, which were published within the second and third terms in government. The messages are crafted to introduce ideas of improving the sector, specifically in order for organisations to 'gear-up' to deliver quality services and compete with organisations from other sectors. There are suggestions that the voluntary sector has the responsibility to build its capacity and realise its potential to deliver better services (HM Treasury, 2002), and improve its performance (Home Office, 2004). There is the suggestion that organisations within the voluntary sector can serve society better if

they increase their role in service delivery. A Cabinet Office document states that the sector needs to prove itself as displayed in the following example:

> *"The third sector has a role in making its contribution visible. As a starting point, organisations need to be able to demonstrate the benefits of their approach, in order to enter into a meaningful discussion about how they can be recognised and rewarded by funders and communities"*
>
> (Cabinet Office, 2006: 23)

The idea that voluntary sector organisations need to become more enterprising and independently sustainable (i.e. not reliant upon Government for resources) is also introduced, if the sector wants to retain its central role (CLG, 2007). That this document was produced within the New Labour administration's second term is a contextual factor which might help, in part, to explain this shift in ideas. It has been suggested that the second term of the New Labour administration ushered in a greater focus on delivery, which brought with it a greater emphasis on an agenda of public sector reform (Richards & Smith, 2004).

Such institutional messages conveying ideas about the need for voluntary organisations to change, improve, develop and become more financially sustainable in order to compete more effectively, and deliver better services, all contribute to the idea that voluntary sector organisations need to 'gear themselves up' to be more effective in the market place (Carmel and Harlock, 2008). These characteristics associated with market rationality sit in contrast to the characteristics associated with community empowerment which have also been surfaced, and once again points to the degree of institutional complexity being constructed and conveyed during this era.

This era of the three New Labour administrations saw an increase in the number of messages about the role of the voluntary sector, the state and the relationship between the two being constructed and conveyed within national documents. The following section, which explores the transition to the Coalition administrative era, will trace whether this level of institutional complexity is carried forwards within the documents of this era.

4.2.5 The transition to the next political era: The Conservative Party's Green paper as a transition document

As with both the Wolfenden report at the end of the Labour administration of 1974-1979, and the Deakin report which came at the end of the Conservative administration of 1979-1997, a document was produced towards the end of the New Labour administration of 1997-2010 by the Conservative Party which outlined their vision for the role of the voluntary sector; 'A Stronger Society: Voluntary Action in the 21st Century' (Conservative Party, 2008).

This document is not directly comparable to the previous reviews; they were produced by independent committees whereas the Green Paper published in 2008 was a document produced by the Conservative party whilst in opposition, and as part of its election campaign. It was not a review but rather a political positioning document, outlining ideas which the Conservative Party pledged to act upon if they were to be successful in the subsequent election in 2010. It is therefore a very different kind of document.

However, in the context of this discursive study of ideas, it has been selected for analysis because it performs a similar function as the two transition documents previously discussed; it presents a set of ideas which demonstrate an ideational shift from the logics underpinning the New Labour administration. As with the review documents already considered, such a Green Paper, written in opposition, was able to use its critique of the New Labour era in order to create the discursive spaces which in turn enabled new ideas to be introduced. As the Conservative Party would go on to form the Coalition administration with the Liberal Democrat Party, this 2008 Green Paper was in some ways indicative of the ideational shift that contributed to the direction of travel within this new government administration.

Whilst acknowledging that this Green Paper is different kind of document, for the reasons considered above, within this study it has been classified as a transitional document, alongside both the Deakin and the Wolfenden Committee Report. The ideas presented within this document will now be explored, before going on to look at the Coalition era (2010-present) itself.

Turning first to the presentation of the state-voluntary sector relationship, the idea of 'partnership' is still woven into this transitional document, as the ideas of 'collective goals' are presented through phrases like, *'in this together'* (Conservative Party, 2008). However, there is an injection of ideas pertaining to a 'separate spheres' relationship, through suggestions that the voluntary sector operates in its own sphere beyond other activity, and that the state in turn should stop interfering, or 'getting in the way' of voluntary sector activity, as demonstrated in the extracts below taken from the Foreword:

> *"But beyond the sphere of the private and informal, there is a public, organised expression of society: the charities, social enterprises, co-operatives and community groups that make up the voluntary sector"*
>
> (Conservative Party, 2008: 4-5)

And:

> *"...Our aim is to change government: from being an object that gets in the way of civil society to being a force that gets behind civil society"*
>
> (Conservative party, 2008: 4-5)

In addition to the state being an 'object' in the way of voluntary activity, the document goes on to embed ideas which encourage a separation, rather than partnership, between government and voluntary action:

> *"In this post-bureaucratic age, the people to identify new problems and discover the best way to solve them won't be ministers holed-up in Whitehall, but the legions of committed individuals, voluntary organisations..."*
>
> (Conservative Party, 2008:6)

There is a message being conveyed that the incumbent political administration (i.e. during the New Labour administration 1997-2010) is holding too much power in the centre, rather than allowing those outside of state structures to have a role in improving society. This critique opens up a discursive space for the reimagining of how the state could act, and how power could be distributed differently. The possibility for a new set of ideas is therefore introduced. It is useful to remember that this is a point which was made within the Wolfenden Committee Report of 1978. In drawing on a similar set of ideas, this document is conveying a sense of coherence with institutional messages of a previous era.

A focus of this document is community; individuals and neighbourhoods, as well as voluntary organisations, and the document facilitates a separation between these aspects of society and state structures. This separation of aspects of society picks apart the presentation within documents of the New Labour administration of partnership and 'togetherness'. This transition document is clearly setting up a contrast between the New Labour approach, and the approach of a Conservative administration, should it succeed in the imminent general election.

The message which primarily conveys the role-identity of the state within this transitional document is 'rolling back the state', which is a shift from the role-identity of 'primacy of the state' which emerged within the documents from the New Labour administration. The ideas conveyed within this document which support this shift are those such as the dangers posed by too much state interference, the overly complex context which the state has developed for the sector, and the need for a new administration to be far less "command-and-control" (Conservative Party, 2008: 61). It places the focus on changing Government, and reducing attempts by the state to direct activities within the voluntary sector, for example:

> *"We believe that the priority for public policy on the voluntary sector is to adapt the state to working with and supporting voluntary organisations, not the other way round. The role of those parts of government with direct responsibility for this agenda is not to coordinate the voluntary sector..."*
>
> (Conservative Party, 2008:72)

The idea of 'rolling back' the state is consistent with the portrayal of a 'separate spheres' relationship between the voluntary sector and the state. Together, they are a recognisable framework for a strong neo-liberal approach, which considers too much state interference in voluntary sector activity as a threat, and a reduced state as a necessary precursor for the embedding of market rationality (Taylor-Gooby, 2012).

The characterisation of the role of the voluntary sector presented discursively within this document is that of 'enduring voluntary action'. The familiar ideas of the virtues and qualities of the sector are presented, for example, "altruism, locality, independence and diversity" (Conservative Party, 2008:4) and "vibrancy and diversity" (Conservative Party, 2008:8). This is consistent with the ideas underpinning the characterisation of the voluntary sector within previous eras, as discussed above. This

continuity can be explained in part by the suggestion that there exists a political consensus regarding the voluntary sector, as it does not represent a key area of political controversy (Kendall, 2010). However, aligning with this familiar idea also achieves a degree of legitimacy, or coherence, as it appeals to a familiar aspect of the cultural repertoire of this institutional context (Beland, 2009).

However, within the familiar messages of 'enduring voluntary action', this document presents ideas which unpick the collective 'sector' identity, which had built up strongly within the New Labour administration. It presents voluntary organisations as one of two things: service delivery agents on the one hand, and expressions of civil society on the other, or "people coming together to make a difference" (Conservative Party, 2008: 6). Where institutional messages from the preceding New Labour administration presents the central proximity as that between the government and the voluntary sector, this document seems to suggest that the strongest link is between voluntary organisations and local communities (Conservative Party, 2008: 12). This suggests a division or separation between the strong ties which the new Labour administration nurtured between the state and the sector, once again reinforcing the idea of a relationship in separate spheres.

Having considered some of the key ways in which this green paper creates some discursive distance between the incumbent New Labour administrative era, and the subsequent Coalition era, it is to this latter era that this empirical analysis will now turn.

4.2.6 Institutional logics conveyed through the institutional messages of the Coalition administration 2010-2015

This section will now discursively consider three documents published within the Coalition administrative era; the renewed 'Compact' (2010), which was produced in partnership with Compact Voice; the 'Open Public Services White Paper', published in 2011 by the Cabinet Office; and finally a progress update on 'Open Public Services', produced by the Cabinet Office in 2012. Because the Conservative Party's Green Paper (2008) was a party document, the analysis which follows also draws on this green paper in a number of instances.

Below is the data from within these documents, which tell the story of the shifting dominance of the institutional logics of this era. The characteristics of the logic are unpacked in the left hand column, with supporting data in the right. Following this table, the discussion surrounding this data will then be considered.

TABLE 4.2.6: Characteristics of Logics, Coalition Administration, 2010-2015

Characteristic of the logic	Data from documents
Role-Identity of the state: Rolling back the state - too much state control is dangerous so Government wants to transfer power down to communities	"Unreasonably short funding periods, centralised commissioning systems and onerous monitoring requirements are all holding back the potential of charities and social enterprises to provide more efficient, more personal services to the public" (Conservative Party, 2008: 53) "Even departments of government are recognising that the command-and-control model is wrong as a means of approaching the voluntary sector" (Conservative Party, 2008: 61) "A flourishing civil society is fundamental to achieving the Power Shift the Coalition Government is committed to, transferring power away from central government to local communities" (HM Government, 2010: 3) "At the heart of the Coalition Government's vision of the Big Society is the drive to give people more power and control over their lives and their communities, to reform public services and to champion social action over state control and top-down, Government-set targets" (Compact, 2010: 6) "In place of centralised control of local governments and local services, we have been localising neighbourhood services and freeing local governments from central control... In place of monolithic public sector agencies, we are opening centrally commissioned services to diverse providers" (Cabinet Office, 2012: 12)
Role-Identity of the sector: Community obligations - the sector has a role in serving and strengthening communities	"Play a bigger role in achieving the collective goals of our society" (Conservative Party, 2008: 56) "empowering communities can only work where the skills, enthusiasm and commitment of the sector is harnessed" (HM Government, 2010: 3)
Role-Identity of the sector:	"The second answer to the question of how we can

Strong market rationality - voluntary sector groups should be able to behave like private sector organisations, and have access to the public services market on a level playing field	ensure that voluntary organisations and social enterprises can make a bigger contribution to delivering public services is so obvious that it is astonishing that its absence is one of the sector's continuing constraints: it is allowing a fair rate of return to be earned" (Conservative Party, 2008: 57) "Allow voluntary organisations delivering public services to earn a competitive return on investment by sharing substantially in the rewards that come from success" (Conservative Party, 2008: 53) "Ensure that CSOs have a greater role and more opportunities in delivering public services by opening up new markets in accordance with wider public service reform measures and reforming the commissioning environment in existing markets" (HM Government, 2010: 3) "breaking down barriers, whether regulatory or financial, so that a diverse range of providers can deliver the public services people want, ensuring a truly level playing field between the public, private and voluntary sectors" (Cabinet Office, 2011: 9)
Role-Identity of the sector: Enduring voluntary action - voluntary organisations have qualities which are understood	"The sector's diversity, and independence together with its reforming, compassionate ethos, are essential in building better outcomes for citizens and communities" (HM Government, 2010: 3) "All [CSOs] share a commitment to social aims, and objectives" (HM Government, 2010: 5)
State-Sector Relationship: Separate spheres - the state should allow groups to operate independently of state interference. The focus becomes communities.	"Our aim is to change Government: from being an object that gets in the way of civil society to being a force that gets behind civil society" (Conservative Party, 2008: 4) "But collective action does not always mean government action" (Conservative Party, 2008: 6) "A flourishing civil society is fundamental to achieving the Power Shift the Coalition Government is committed to, transferring power away from central government to local communities" (HM Government, 2010: 3) "In this post-bureaucratic age, the people to identify new problems and discover the best way to solve them

	won't be ministers holed-up in Whitehall, but the legions of committed individuals, voluntary organisations, social enterprises, commercial companies and communities" (Conservative Party, 2008: 6)

With the introduction of the Coalition administration following the 2010 general election, the institutional messages of this era retain aspects of the idea of the partnership between the sectors. But as alluded to in the Conservative Party's Green Paper, conveying the sectors within 'separate spheres' is in the ascendancy (Macmillan, 2013). Although partnership is still referred to, there are multiple references to the need for the state to be less controlling, and hand power over to communities. For example:

> *"We can wrest power out of the hands of highly paid officials and give it back to the people"*
>
> (Cabinet Office, 2011:12).

This reference within a White Paper presents an idea which will help to shape future policy. The negative presentation of overpaid, over-powerful state actors introduces an idea of power imbalance between the state and communities, and thus starts to unpick the strong partnership messages of the preceding administration. These ideas of a relationship in 'separate spheres', further embeds the separation between the state and communities (Macmillan, 2013).

The presentation of the role of the state through the institutional messages of the Coalition era, reviewed within this study, is that of reduction of its scale, particularly in terms of control and delivery of services 'on the ground', or 'rolling back the state'. This is supported by reference to the failings of the state which could be solved by reducing state control and interference:

> *"Instead of seeking to run services directly, the role of the central state is being redefined as overseeing"*
>
> (Cabinet Office, 2011:11)

This links with 'market rationality' ideas, which run throughout the documents, suggesting that the Government pledges to open up new markets to ensure greater competition (Cabinet Office, 2011). These ideas underpin both the role assigned to the

state, but also voluntary sector organisations, with the overt suggestion that voluntary organisations should have equal access to public service markets as organisations from the public and private sectors. For example, within the renewed Compact document, the Coalition government pledges to:

> *"Ensure that CSOs [*Civil Society Organisations*] have a greater role and more opportunities in delivering public services, by opening up new markets in accordance with wider public service reform measures and reforming the commissioning environment in existing markets"*
>
> (HM Government, 2010: 10)

This document was published in partnership with the independent group, 'Compact Voice', and its purpose was to renew the concordat between the voluntary sector and state actors. As the quotation above demonstrates, the ideas presented by the state within this document are framed by a primary concern with the voluntary sector's role in delivering services, within a competitive market. This reframing of the agreement embeds the Coalition Administration's position, through ideas of market rationality.

The 'enduring voluntary action' characteristics still underpin the presentation of the voluntary sector going into the Coalition administrative era, with references in documents such as the strength, skills and enthusiasm of voluntary organisations (HM Government, 2010). Once again, this familiar characteristic achieves a degree of legitimacy for this era, as a well-recognised and widely supported idea due to its coherence with widely accepted norms and beliefs (Suchman, 1995) about how voluntary agencies contribute to society.

In the renewed Compact of 2010, the Foreword by David Cameron considers the role of the sector:

> "*Looking forward the role of this sector has never been more important. Building the Big Society and getting citizens more engaged, involved and responsible for the communities around them will only be possible in partnership with the sector; improving and delivering better, more responsive public services can only be done with the help of the sector; and empowering communities can only work where the skills, enthusiasm and commitment of the sector is harnessed*"
>
> (HM Government, 2010: 3)

The references to skills, enthusiasm and commitment are familiar, and closely align to documents from preceding eras and the ideas discussed above. However, alongside such familiar ideas is the introduction of the idea of 'responsibility'; citizens should be 'responsible' for the wider communities around them, and voluntary organisations have a role to play in making them responsible. This shifts the role of the sector slightly, adding to the list of commonly-noted attributes an additional duty. This hints at a shift of responsibility away from the central state, onto both voluntary organisations and individual citizens. This in turn supports the overall shrinking role of the state, and the increase in the role of the individual, prioritising individual interests at the expense of collective communities (Lowndes and Pratchett, 2012).

4.3 Conclusion

In undertaking this discursive analysis, this chapter has sought to surface the linguistic devices through which state actors appeal to overarching logics of an era via the institutional messages – or documents - they produce. Through characterising national documents as institutional messages, and surfacing and discussing the ideas at the heart of an administration, this chapter has made a series of insights. This discursive analysis has demonstrated how documents, as institutional messages, convey the 'institutional attitudes' of an administration (Lammers, 2011). The ideas about what the voluntary sector is, and its purpose and value, labelled within this chapter as 'enduring voluntary action', surfaces across all the eras considered. However, additional ideas are overlaid within particular eras in order to support the institutional attitude of the administration, such as empowerment and social capital within the New Labour era.

The role and position of the state shifts between the political eras, which in turn leads to a re-framing of messages about how the state and the sector relate to one-another. An illustration of this would be the strength of the partnership idea within the New Labour administration, which shifted within the messages of the Coalition administration to convey more of a 'separate spheres' relationship between the two sectors. This demonstrates that, as administrative ideologies change, the institutional logics which frame and underpin different eras shift in relevance, coherence and appeal. Language within national documents can become powerful tools, which can be used to both convey, but also construct, institutional logics.

This leads back to the question of whether messages simply convey logics, as suggested by Lammers (2011) or whether instead, messages have a role in the crafting of logics (see arguments of Suddaby, 2011; Hardy 2011). This study would suggest that both can be the case. In some cases, messages are crafted to convey a well-rehearsed set of ideas, such as those regarding the role and position of voluntary sector organisations and actors conveying 'enduring voluntary action' characteristics. However, messages can also be instrumental in introducing shifts in ideas, such as the linguistic devices used by the Coalition administration in its 2011 Public Services White Paper to introduce a separation between state actors and citizens (discussed on above). This study would suggest that there is no single line of causality between messages and logics, but rather a two-way flow, where messages are crafted to both support (or convey) and challenge the beliefs and practices underpinning institutional logics.

The empirical aspect of this study has uncovered the stories told by the longevity of certain messages and the cyclical nature of others. This has surfaced the way in which state actors craft messages which are in turn coherent with their ideological approach. Through this discussion, I have illuminated the important role of transitional documents within the context of shifting institutional logics. Documents created beyond the boundaries of the governing administration use critique of the existing era in order to effectively create discursive space for new ideas to be introduced. I suggest that such documents, therefore, pave the way for an ideational shift in the subsequent era, and support the coherence of a new set of institutional messages built around these ideas.

This chapter has also explored the idea of institutional complexity, through the consideration of contrasting, and even contradictory messages within single documents. This is suggestive of the extent of institutional complexity which is constructed and conveyed via national documents such as those considered herein. The table on the next page is a summary table, capturing the central characteristics of institutional logics which are conveyed via the national documents considered, along with detail of the belief systems and associated practices which are communicated. This displays the degree of institutional complexity of each individual political era.

TABLE 4.3: SUMMARY TABLE OF THE BELIEF SYSTEMS AND ASSOCIATED PRACTICES WITHIN NATIONAL DOCUMENTS, 1979-2015

ERA		State identity	Voluntary sector identity	Relationship
1979-1997	**Belief systems**	Small state and competitive market for public services	Voluntary action is historical, a deep-rooted human impulse, has qualities which are understood	The state and voluntary sector should operate in separate spheres
	Associated practices	The state should have a limited role in service delivery; should not direct the voluntary sector, but provide a context in which organisations can operate well.	Voluntary organisations can get closer to communities, flexible, innovative, operate at a lower cost (as compared with the state)	The state should not interfere with voluntary sector organisations and their activities.
1997-2010	**Belief systems**	The state has a central role to play in society; principle of 'mixed economy' with regard to public services	The sector has enduring qualities; role in improving civic life; should exist within a mixed economy of public services	State-voluntary sector partnership
	Associated practices	The state should be involved in service delivery, but alongside the voluntary sector (via a competitive market)	Voluntary sector has a range of strengths with working with disadvantaged communities; must improve performance, develop and modernise	The state and the voluntary sector should work closely together in order to help to change society, and realise greater outcomes
2010-present (2014)	**Belief systems**	Small state, competitive market for public services; communities should have more power over decisions which affect them	Voluntary groups have enduring qualities; have community obligations; should behave more like private sector entities	The state should reduce its interference with voluntary sector organisations and operate more within separate spheres
	Associated practices	The state should have a reduced role in service delivery, and transfer power to communities.	Should be able to behave like private entities in an open public services market; should play a greater role in strengthening communities	The state should allow voluntary groups to operate independently

The messages constructed within these documents draw on a range of ideas, which are associated with different institutional logics, for example those associated with market principles, and those associated with a partnership in community endeavour. In this case, the documents provide a context for observing how multiple logics are available and can interact, and indeed offer contradictions, concomitantly (Greenwood et al, 2011; Nigam and Ocasio, 2010).

It has been suggested that extant work focuses to a large extent on exploring how one logic replaces its predecessor (Kodeih and Greenwood, 2014). However, this work develops our understanding of the idea of 'constellations' of logics (Goodrick and Reay, 2011) through demonstrating how messages which convey multiple logics can coexist, with the question being that of dominance rather than replacement. For example, when considering documents within the Coalition era, this analysis has surfaced ideas relating to the enduring voluntary action message, but presented the argument that a stronger market rationality message is coming to the fore. It has not replaced notions of the sector's role within communities and the enduring nature of voluntary action, but rather offers a different priority.

However, message creation and presentation are not the whole story when exploring the *power* of these ideas. The way in which ideas are received, responded to, translated and re-worked are also key aspects which help to determine whether ideas are sustained. These questions can only be explored by in-depth work at the micro level, and the examination of individual actors' agency within organisations.

It is to the micro level of organisations, and organisational actors to which this study will now turn. This is the next step in the exploration of the central ideas which are bound-up within the relationship between the state and the voluntary sector.

5. FIELD IMPLICATIONS OF SHIFTING LOGICS: AN ANALYSIS OF ACTOR ACCOUNTS

This chapter presents the first aspect of the empirical work at the micro level of Local Infrastructure Organisations (LIOs) and the actors who work and volunteer within them. The previous chapter explored the ways in which national documents construct and convey institutional logics, which characterise the role of the voluntary sector, the role of state, and the relationship between the two. This chapter considers how actor narratives can illuminate the implications of shifts in logics at the societal level, and thus offers a bridge between the societal and micro levels of institutional analysis (Lammers, 2011; Lawrence et al, 2011). Through exploring actor accounts, this chapter considers how actors make sense of, and narrate, field changes ensuing from shifting logics.

In order to understand the complexity at the organisational level more fully, the concept of the organisational field was used (Greenwood and Suddaby, 2006). It became clear that an acknowledgement of field-level processes would enable a better understanding of the relationship between societal level messages and the accounts of field level actors (Greenwood et al, 2011). In the first empirical chapter (Chapter 4), the ideas embedded within messages at the societal level were considered. This empirical chapter represents the next step in this research project, which is to explore the ways in which organisational actors within local voluntary organisations discursively explore the changes at the field level. In so doing, this chapter helps to respond to the second research question, which is:

> *"What do Local Infrastructure Organisational actors suggest are the field-level implications associated with shifts in ideas regarding the role of the sector, the state and the state-sector relationship?"*

This chapter presents the argument that actors within their accounts are describing a series of field level constraints, which have been weakened by the shift in logics at the societal level. In turn, this opens up space for different kinds of organisational and actor responses. In other words, the weakening of the constraints which have come to characterise the organisational field are contributing-factors in the descriptions actors have provided of new kinds of activity, or organisational practices.

In proposing this argument, three distinct contributions are made to extant literature. Firstly, existing studies suggest that weak constraints are most likely to occur within new or emerging fields (see for example Braithwaite and Drahos, 2000; Powell, 1999; Rojas, 2010) whereas this study introduces the idea that weakened field constraints can be a significant factor within well-established fields. This opens a new way of theorising, and therefore understanding, change within mature fields.

Secondly, although extant studies refer to the notion of field constraints (Dacin et al, 2002; Phillips et al, 2000; Zietsma and Lawrence, 2010), and weakened constraints (Rojas, 2010; Wry et al, 2011), there isn't a well-developed understanding about how constraints are characterised, how they are experienced and how a weakening of these constraints can be manifested. The enhanced understanding of how weakened constraints are experienced by actors within a mature field enables a micro level typology of weakened constraints, as they are experienced and described by organisational actors, to be proposed (see third column of Table 5 below). This helps us to understand more about how organisational actors narrate institutional complexity, and could therefore inform scholars seeking to understand and explain organisational or actor responses in other contexts (Pache and Santos, 2010) by providing a typology against which to consider such contexts.

A third and final contribution made within this chapter is the presentation of an aspect of the organisational response which was described in a number of different accounts: the interplay between weakened field constraints of a mature field, and the engagement in inter-organisational collaborations at the field level. Extant literature explores the role of inter-organisational collaboration in the *development* of organisational fields (Phillips et al, 2000), but this study suggests that it may be a practice response which features in mature fields. This may help to illuminate how such responses are considered in future studies.

This chapter begins with a discussion of organisational fields and field constraints, in order to frame the subsequent exploration of the empirical work. Following the presentation of these theoretical concepts, the chapter presents three central examples of field level changes: changing field structures, disruption at the field level, and emergent field structures. The chapter considers how the field level changes are

being narrated as a weakening of constraints, and how this can be understood in the context of the societal level ideational shifts explored in Chapter 4. Following the discussion of examples of weakened field constraints, there is a presentation of data which illustrates how the actors narrated the practice implications of the field level changes, i.e. what they are 'doing' in response to weakening field constraints. Table 5 below provides a summary of the central arguments made within this chapter.

Table 5: Summary of Societal Messages, Weakened Field Constraints and Practice Implications

Societal Messages	**Actor descriptions of field-level changes**	**Actor descriptions of weakened constraints**	**Actor descriptions of practice implications – or opportunities- for organisations**
Rolling back the state – reducing local government infrastructure	Changing field structures	Loss of acknowledged dialogue arenas; Unclear rules of engagement	Alternative communication channels forged
Rolling back the state – reducing local government infrastructure	Disruption at the field level	Upheaval and instability in the public sector, conveyed as causing problems for voluntary sector actors, for example through loss of relationships and working practices	Inter-organisational collaborations developed
Market rationality – creating new structures in part to improve efficiency (increase in external delivery contracts)	Emergent field structures	New statutory sector structures being created, leading to confusion/problems for existing ways of working	Promoting the work of the voluntary sector

The following section introduces the concepts at the centre of this chapter. These are the concept of the organisational field, and the idea of constraints which typify the field. The data analysis and discussion then follows.

5.1 A voluntary sector perspective: organisational fields

The organisational field is a concept which helps us to understand the context within which organisations, and organisational actors, are operating. The field is the site wherein processes are enacted within and between organisations. It is also a site where processes playing out elsewhere – such as logic shifts at the societal level - can be felt. It is through developing a more enhanced awareness of such processes, or indeed how actors account for such processes, that we can better understand changes at the field level (Greenwood and Suddaby, 2006), periods of stability, or indeed processes of restabilising at the field level following a period of disruption (Reay and Hinings, 2005). Within the context of this study, it is specifically the development of a better understanding of how individual actors make sense of field level changes, which is of particular interest.

The 'organisational field' is a "recognized area of institutional life" (Scott, 1994, cited in 2008: 86) or "organizations that, in aggregate, constitute a recognized area of institutional life" (DiMaggio and Powell, 1991, 148). This understanding focuses on organisations and individuals whose activities are interlinked in the course of their day-to-day functioning. Therefore the organisational field within this study is taken to comprise local voluntary organisations engaging broadly in social welfare activities, the individual actors working and volunteering within these organisations, as well as funders, partners, beneficiaries, and wider stakeholders (Scott, 2008). Following this line of understanding, organisational fields contain organisations that need to interact, including 'producer organisations' along with their "exchange partners, customers, competitors, intermediary actors, regulators and funding agents", i.e. the level at which institutional forces are having an impact (Scott, 2008: 182).

How the field is conceptualised is important, particularly because of the contested nature of how the voluntary sector is defined and understood, as was explored in Chapter 1. An extant strand of organisational literature (see Fligstein and McAdam, 2011) takes a more focused approach to fields, or strategic action fields, suggesting that there are multiple layers of fields, which go from micro level to macro level, and "look a lot like Russian dolls: open up an [Strategic Action Field] and it contains a number of other SAFs" (Fligstein and McAdam, 2011: 3). Adopting this more focused understanding – and thus understanding the voluntary sector to be a field in its own

right - could bring into play the contested nature of a single definition and label for the 'voluntary sector', which has been linked to suggestions that the homogeneity or unity implied by a single label is misleading (Alcock and Kendall, 2011; Johansson, 2003). It is more useful within this study to consider Scott's (2008) suggestion that within a field sits a number of organisational populations, which are distinct sets of organisations which are acting and reacting within a relational context with other organisation populations. This understanding acknowledges the many links and crossovers which characterise voluntary sector organisational context.

The 'organisational field' is a theoretical concept which has been identified for this study, as it provides a framework through which to better understand the relationship between the state and voluntary sector organisations. Relationships help to structure fields (Phillips et al, 2000); they are therefore not an incidental grouping of organisations, but instead forged out of the interaction, collaboration and power relations between different social agents. In a study which sets out to explore a particular set of relationships (i.e. between the state and actors within LIOs), the field as an interactive concept, is particularly useful. The organisational field is also a concept which makes the vague idea of 'organisational environment' or 'context' more visible and tangible, and thus lends itself to the research endeavour (Scott, 2008).

Fields are characterised by 'boundaries' or constraints (Dacin et al, 2002), and extant literature tells us that constraints are created by institutionalised rules and resources, (Phillips et al, 2000) or regulatory controls and normative practices of the 'field community' (Zietsma and Lawrence, 2010). Organisations, and individual organisational actors, within a field maintain the norms and practices associated with that field (Dacin et al, 2002; Greenwood and Suddaby, 2006; Oliver, 1991). Considering such constraints within the context of voluntary sector organisations, an example would be the regulatory controls for this population of organisations and actors resulting from charity law, which requires organisations to comply with a series of legal requirements in order to maintain charitable status. Alongside such legislative controls, normative practices play their part in managing understandings about what behaviours are considered appropriate and therefore legitimate within a field (Leblebici et al, 1991; Wooten and Hoffman, 2008). Examples of these normative practices would be ways in which actors maintain the myriad of relationships with

funders, beneficiaries and partner organisations, through well-established engagement forums, or through acknowledged inter-organisational relationships. The patterns of behaviour, associated with expectations from both within and outside individual organisations, work as factors in the maintenance of local social order, or context (Fligstein, 2001).

Extant work tells us that *context* can impact upon organisational fields. Indeed this was first explored by scholars such as Meyer and Rowan (1977) and DiMaggio and Powell (1983). These central bodies of work, which are now considered to have initiated new institutionalist scholarship, outlined how organisations are influenced by their institutional contexts. Simply put, these studies helped to illuminate how widely held social understandings, or rules and norms of society, impact upon and influence organisations (Greenwood et al, 2008). However, there has been a tendency within such scholarship to prioritise studies which seek to explain institutional stability at the field level, or:

> *"the steady state, a mature organizational field that has stronger forces holding it together than forces that lead to disruption and change"*
>
> (Hinings et al, 2004: 304)

Although this tendency has been corrected somewhat by a series of studies which do consider processes of change (for example Dacin et al, 2002; Seo and Creed, 2002), there are two central gaps which this extant work fails to address. The first gap concerns the nature of the change explained, and the second gap is around *how* we conceptualise change. Studies which prioritise explanations of institutional change commonly confront large-scale, fundamental or traumatic changes to the field, which lead to shifts in organisational activity. These episodes are often called 'punctuated equilibrium' (see for example Fligstein, 1991; Newman, 2000; Parsons and Fidler, 2005; Romanelli and Tushman, 1994), and such studies commonly focus upon brief periods of intense activity. Less is understood about small scale, incremental change which may take place, and subsequently less is known about actor responses to such changes. Therefore, this study's focus on how shifts in institutional messages at the societal level, whilst not representing large-scale, traumatic changes, can represent a shift in the prominence of institutional logics, helps to illuminate and frame more subtle shifts at the field level.

The second gap is found when we consider what is currently understood about how field level changes are experienced by actors within local organisations – what do they say is changing, and are there links between such narrated changes and the shifts observed in societal institutional messages as explored in Chapter 4. A central critique of much extant institutional literature is that it fails to actually specify the detail of the institutional processes explored (Seo and Creed, 2002). This critique can be applied to extant work surrounding field constraints, a central concept within this study.

The idea that constraints (i.e. social understandings, norms) which typify a field of organisations, can experience a weakening, suggests that the field is a fluid conception (Wry et al, 2011). Existing scholarly work which explores weakened constraints commonly associated such weakening with new fields (see for example Rojas, 2011 in his study of institutional work, power and legitimacy norms). This can be understood within the context of much extant institutional literature prioritising the *stability* of mature fields (Hinings et al, 2004). Thus, the idea that an established, mature field can experience weakened constraints has not been sufficiently explored. Returning to the critique which suggests that extant work fails to specify the detail of institutional processes, we do not know what weakened constraints actually *look like* (or indeed how they are experienced*)* at the field level, particularly within a mature field.

Developing a better understanding of how organisations at the local level experience weakened constraints, and may subsequently develop practice responses, further responds to the call for scholars to attend to the 'lived experience' of organisations (Lawrence et al, 2011). Having explored how the state has worked to shift dominant logics, this subsequent chapter considers how actors narrate the shifting context. This study explores actor narratives to develop a more in-depth understanding about how actors experience the weakening of field constraints at the micro level, and how they discursively present this within their accounts. Of particular interest is how individual actors talk about the structures and practices which make up the field constraints within this context. How actors narrate the dismantling, or shifting, of these constraints, and how such dismantling or shifting affects individuals and their activity is also explored. Understanding organisational responses to shifts at the field level can help us to better understand how organisations seek to survive in times of upheaval or uncertainty (Greenwood et al, 2011).

This broad context sets the scene for the stories of individual actors (both staff and trustees) who were involved in this research project, narrating how they were making sense of the shifting societal level ideational context and the practice implications of these shifts (i.e. how their activities and behaviours were engaging with their ideational context). Having introduced how the theoretical concepts of the organisational field and field constraints have been used within this study, the empirical work will now be presented. This illustrates the way in which actors accounted for shifts in the well-established fields, and a subsequent exploration of actor responses to these weakening constraints.

5.2 Analysis

The themes discussed below were borne out of an in-depth interpretive approach to data analysis (Heracleous, 2006), which is explained more fully within the Methodology (see Chapter 3). The following section explores three cases of field level change which were conveyed through actor accounts, and which have been labelled:

1. Changing field structures;
2. Disruption at the field level; and
3. New field structures.

Taking each in turn, this analysis considers the way in which they are experienced by the organisational actors as weakened field constraints, which then help to frame different actor and organisational responses described within the accounts. Taking each example of weakened constraints in turn, the table below (Table 5.2.1) takes the first such example, 'changing field structures', highlighting how extracts from narratives convey stories of change at the field level, how the concept of weakening field constraints can help us to understand how these changes are experienced and reported, and how these changes can be traced back to ideational shifts at the national level. This represents the first aspect of the typology of weakened field constraints proposed from this study.

5.2.1 Changing field structures

A number of LIO actors who engaged with this study conveyed their experiences of structural changes at field level, and the impact of these changes. These changes often referred to the loss of multi-organisational fora which had enabled inter-organisational

communication. The table below brings together a number of extracts from LIO actor accounts, which explore this issue.

TABLE 5.2.1: Changing field structures as weakening constraints

Dimension	Data
Changing field structures – the loss of partnership groups and networks has lessened opportunities for field-level dialogue. Weakened constraints by loss of acknowledged 'rules' of engagement	"There were certain outlets and arenas in which you could speak...and we were, if you like, dialogue partners...When they've gone, it becomes much more difficult. Partly, I think, [this organisation] will sustain discussions with the local authorities and the PCT and so on, but unless you've some sort of, in a sense, standing arrangement, then the danger is I suspect that you only get into a conversation when there's something to complain about" (Trustee, Organisation A) "We're gone through a very curious loop in the last 10 years, when government became interested in networking.... So for a few years we were heavily involved in that. But of course what's now happened is that government has decided that that is no longer a priority" (Trustee, Organisation A) "A lot of touch points around formal partnership structures, like LSPs and all of that, just falling apart, disappeared" (Staff, Organisation B) "this government has no interest in the word representation whatsoever, it's just gone off the radar completely; not particularly interested in the independent voice of the sector in some ways, that's my feeling" (Staff, Organisation B) "A lot of voluntary sector organisations are just having to do the best they can, because a lot of the local authority areas aren't saying, 'yes of course the voluntary sector can come on board" (Staff, Organisation B) "The representation kind-of opportunities have really fallen off, because of the new structures that Government has put in place. Whereas we'd have, say, 6 or 7 representatives on [area] structures, [area] partnership boards and so on and so forth, there are no more partnership boards hence our ability to be represented at several different places has totally diminished" (Staff, Organisation C)

Interactive opportunities which presented LIO actors with a possible forum within which to engage with statutory sector partners were highlighted as important

structural aspects of the organisational field. One such example cited by a number of actors was the Community Empowerment Networks. These were voluntary sector networks, funded through the community empowerment fund, and were established alongside the Local Strategic Partnerships (LSPs) (Johnson and Osborne, 2003).

The LSPs had been established as part of the New Labour administration's policy approaches intended to transform local governance (Aulakh et al., 2002). As non-statutory partnerships, LSPs were established in many local authority areas across England. However, Neighbourhood Renewal funding for the 88 most deprived neighbourhoods in England was dependent on the establishment of LSPs (Taylor, 2007) and therefore they were created particularly quickly within these 88 priority areas (Geddes, 2006). The aim of the CENs was to enable community representatives to play a more active role in the LSPs, which was intended to be one of the points of distinction from previous regeneration partnerships (Johnson and Osborne, 2003). However, with policy shifts from 2005, funding for these networks was greatly diminished, and many have since reduced in scale or disappeared completely (Carrahar et al, 2008).

The loss of opportunities such as these was raised by a number of participants, and was portrayed as an important shift at the field level. It is important to note that all three organisations from which interview participants were identified had been in a designated Neighbourhood Renewal area, and therefore the closure of this programme had significant consequences in terms of funding levels for both Local Authorities but also for voluntary sector organisations benefiting from CEN funding (Carrahar et al, 2008). The loss of these voluntary sector networks was discussed in terms of a loss of a 'vertical' dialogue channel to convey experiences and social learning from communities up to decision makers. It is important to note that this loss of vertical dialogue channels, as articulated by actors within this study, started within the third New Labour administration, and it has been suggested that the Coalition administration has embedded a neglect of the partnership agenda, "allowing Local Strategic Partnerships (LSPs) and Community Strategies to wither on the vine", as they received no investment from the Coalition administration (Lowndes and Pratchett, 2012: 29).

These formal, structured communication arenas had existed for several years, and had established a well-understood means of pursuing field level dialogues. This therefore suggests that the communication practices associated with such arenas may be considered a field-level norm (Dacin et al, 2002; Greenwood and Suddaby, 2006) in terms of the practice of inter-organisational communication, and thus can be understood as a field constraint. When this structure, and the norms and practices associated with it, had been taken apart, the participants point to the way in which communication or dialogue opportunities have "disappeared" (Staff, Organisation B) and that there are simply "no more partnership boards" (Staff, Organisation C). This shift at the field level, with the loss of normative communication practices, can therefore be understood as a weakening of field constraints.

The ending of the funding for Local Strategic Partnerships was a component of the Coalition administration's shift away from big government, and towards a 'Big Society' (Lowndes and Pratchett, 2012). This can be recognised as part of an overarching shift away from the neighbourhood-based regeneration programmes which had been established under the New Labour administrations of the early 2000s (Lupton, 2013). Such shifts are coherent with the societal-level institutional messages surfaced in Chapter 4, of rolling back the state and the shift to state-sector operating in separate spheres.

The actor narratives presented in table 5.2.1 above paint a picture of a vacuum of formal dialogue opportunities being experienced. This supports and extends extant analysis which suggests that current policy approaches are leading to fragmentation and loss of knowledge in many areas (Lowndes and Squires, 2012). The actor accounts presented herein develops this picture of the local level, with the loss in voice opportunities being discussed by one actor as leading to the questioning of the voice and representation role of voluntary groups at all:

> *"My work today is an inheritor of the Labour community empowerment networks investment, so there was at least some national approach...totally gone, to the extent that every now and then you get these outraged outbursts from various ministers that don't just challenge what is being said by some terrible upstart charity, but actually question their right to say it"*
>
> (Staff, Organisation B)

This quote alludes to not just the idea of the loss of recognised 'voice' structures, but to certain cases whereby statutory voices question the validity of the sector's representation role. When considered in terms of field-level structures, and field level norms surrounding those structures, this can be understood as a weakening of the field constraints around the established forums for communication.

Acknowledging that well-established fields can experience this kind of weakening of constraints is an important development of current understanding, which suggests that weakened constraints are typical within newly emerging fields (Rojas, 2010). If we start to understand the ways in which well-established fields can experience a weakening of constraints, it may help us to better understand and track micro-level shifts across a range of institutional contexts.

Alongside these narratives illustrating the loss of existing, well-understood dialogue opportunities, actors described the ways in which they and colleagues were devising different ways of re-establishing communication links. Although the ability to communicate experience and learning from their work with their members and beneficiaries was discussed in terms of becoming more challenging, within their accounts, organisational actors explained how their approach to inter-organisational communication had changed in order to re-establish some kind of alternative communication channels.

5.2.2 Alternative methods of communicating and working

Alongside their descriptions of the loss of well-established communication fora, actors within this study described the work they were doing in order to construct alternative ways of communicating and working. These examples vary from developing individual 'opportunistic' relationships to building ad-hoc partnerships in response to particular field-level challenges. All can be characterised as developing new ways of communicating and thus working beyond the boundary of a single organisation. The table below (Table 5.2.2) provides a series of example extracts to illuminate how actors described the work they were doing in order to carve-out such communicative opportunities.

TABLE 5.2.2: Dimensions of alternative ways of working and communicating

Data	Dimension
"So I just phoned the guy up and said, 'we've got to talk'. So we just had a conversation and I just pitched him something and he said, 'Yes'... I think we've just got to be smarter about that, I think. Sometimes you've got to go, 'well, actually, that's what we do so why don't you invest in us?'" (Organisation A) *"we've been able to actually bring in different providers that they perhaps haven't met before and have a really frank conversation about, 'OK I can't do it for that and this is why' and really start those conversations. And that's the approach that we take, getting people in a room and letting them just talk about it, and it seems to be, it seems to work"* (Staff, Organisation B) "we've been developing work around participatory budgeting, it's a different strand of that, how people can have a say and be influential" (Staff, Organisation B) *"we have been very savvy, because, so we haven't got a statutory place on the health and well-being board, as the voluntary sector. Healthwatch has got a place. Because of some of the relationships with existing staff on the Healthwatch team, the local authority...suggested we might want to put [this organisation's] chief executive in that place, until Healthwatch was sorted out and we have a chair. So that's a bonus for us, as it means we have sector representation as well as Healthwatch representation. So that's the way we've worked it"* (Staff, Organisation B)	Actors engaging in alternative ways of communicating and working

The way in which actors describe their engagement in specific work, with the aim of establishing new ways of communicating with other organisations, or sectors, demonstrates how voluntary sector organisational actors are working to rebuild communication infrastructure, and plug some of the gaps left by the dismantling of established structures and the associated normative practices.

As one member of staff from Organisation B discusses:

> "[We] *are doing some training for CCG commissioners, around engagement and consultation, that's income gen, but it's a really useful tool for us, to introduce the sector to people who have never engaged in the 6 years I've been here*"
>
> (Staff, Organisation B)

Within this extract, this actor is describing a particular practice which has opened up additional opportunities for building new communication channels and new relationships. As the emergence of a new field level structure has weakened established ways of working, space has been opened-up for new work which has afforded this actor an opportunity for building new communication channels.

As actors were describing the ways in which they were engaging in work to pro-actively develop new channels of communication, they highlighted an important way in which they are exploiting the context of weakened field constraints, and creating an organisational response to this instance of institutional complexity. The loss of the dialogue infrastructure which was explored in section 5.2.1 above, whilst described as a loss to voluntary sector organisations, has also been described as prompting organisations to work to establish different dialogue forums, or new ways of accessing the newly established statutory structures. In so doing, these organisational actors are responding to some aspects of the attempts to reduce the scale of state infrastructure (i.e. those partnership groups which were dismantled) through their attempts to build new dialogue forums, or ways of conveying messages from their work upwards to decision makers.

This insight extends existing understanding of how actors with relatively little power can engage in instances of institutional work in order to re-establish ways of working and communicating within a field characterised by weakened constraints and institutional complexity. Extant work points to how actors use points of disruption to achieve greater power and effect institutional change (Rojas, 2010), or re-establish positions of power and field dominance (Currie et al, 2012). However, this study of actors within LIOs points to examples of work which exploit the weakening of constraints in order to re-make inter-organisational and inter-sector communication channels and ways of working. In developing this understanding, I offer new ways of understanding work at the micro level, and how this work can affect the workings or structure of the field. Attending to narratives at this level can illuminate micro-

processes which may be taking place, and which are often overlooked in extant work (Lawrence et al, 2011).

As well as actors conveying the impact of reducing field level dialogue opportunities, and the practice implications of such changes, the financial cuts to local authorities, cascading from the austerity agenda of the Coalition administration are described by the organisational actors as leading to further structural shifts at the field level. This disruption at the field level is the second example of weakened constraints which is discussed within this chapter. This is considered in section 5.2.3 below.

5.2.3 Disruption at the field level

The effects of the austerity agenda, and associated budget cuts were discussed extensively by actors within this study. However, the discussions were not limited to direct impacts on organisational or activity budgets. Discussions commonly reflected on the disruption to the field, beyond the voluntary sector population, and often centred on the implications for local authorities. Actors referred to the loss of personnel, departments and specific projects, but also reflected on the general disruption and loss of clarity around people and structures. The table below highlights extracts from actor accounts, as they convey some of these changes.

TABLE 5.2.3: Changes described as causing disruption at the field level

Dimension	Data
Changes at the field level – upheaval and instability in the public sector	"Somebody in the city council said phone me, it was like one of those emergency phone calls; 'I've been told that you can do this!' And that's happening a lot recently, and that's because the city council has lost a lot of skill and expertise, as people have been kind of shipped-out. So in the past, the people that would have picked this up have just, they're simply not there anymore. So they actually need us now to go and step in." (Staff, Organisation A) "With personnel, a lot of this is eye to eye contact, to a certain extent, and trusting, knowing you can trust the person, which is a bit funny, isn't it, that you go back to very basic human things. And if you build that up, and that works, but then the other person goes, and you've got to do a lot of work to build up a trust, them with you and you with them, really. So it's a bit, that the personnel changes, and then you're back to square one." (Trustee, Organisation A) "the Play Service has been decimated, the Youth Service is in tatters, [a coordinating play organisation] were then really struggling to get by...I'd been talking to a couple of elected members who were worried that there was no play activity" (Staff, Organisation A) "Since we've got the Coalition government, we've got the squeeze on the local authorities...[this organisation] was decimated..." (Trustee, Organisation A) "It's very difficult, speaking personally, it's very difficult to get your head around what's happening, and how it's going to be. And you keep thinking, 'well we've got to be there', and then there are changes to somewhere else, so one of the things we've got to do as [this organisation] is get the voice of the sector onto these committees...We've struggled, and we've tried hard, and we know that we're doing things that [the public sector] would like but it's getting very hard" (Trustee, Organisation A) "One of the challenges at the moment is everybody's leaving, and so a key thing on our risk register is the changes to personnel and the risk to our organisation. Because our organisation is actually about relationships. As an infrastructure organisation, I think you rely on two things. You rely on the quality of your work, and the quality

of your relationships. They're the only two things. You can let one of those go for a bit, and you'll get by on the other for a while, but actually you need both of those things. And so we have a risk, not around the quality of the work, but around actually those changing people. A lot of people are taking voluntary severance, quite senior, you're getting some people jump into some seats where, they might not think they're doing it, but actually, 'I've got a bigger job, it's a bigger portfolio, therefore I need to change the world" (Staff, Organisation B)

"What it means locally, and who the main players are going to be, I think there's still a body of work to do there in terms of naming people...because that was what was missing" (Staff, Organisation B)

"it does seem now, particularly, that there's the increasing pressure on local authorities to save money, and we're a few years into the efficiencies, and there's a few more years to go, and already so many services have been lost" (Trustee, Organisation B)

"And it's the same with the local authorities, you know, every year there's a major restructure, and people are going, and going, and there's only so much energy, and you think 'I can't be bothered trying to keep up with it all anymore" (Trustee, Organisation B)

"The cuts have had a massive impact, because whole departments have just disappeared basically. I think, for example, to go back to the examples of CCGs, in the transfer over to the CCG, many of our groups didn't know where their contracts lay, it was crazy, a total mess...Lots of stuff is still playing out" (Staff, Organisation C)

"What's happened is that some commissioning has gone over to [the CCG) anyway, and that will have happened for all CCGs. So all contracts will roll over, and will continue for a little while before they start commissioning, and that has happened here, that was quite clear. What we didn't understand was who was going to be taking on what contracts. So there was no clarity there, either, from who was going to have responsibility for the contracts" (Staff, Organisation C)

The extracts above illustrate the way in which the cuts to local authority budgets have been observed and experienced by the organisational actors engaged in this study. As

they explain in their narratives, the cuts and associated loss of personnel, have had a range of implications for organisational practices, such as experiencing greater expectations on voluntary sector partners, and confusion at the field level in terms of understanding both the ways in which important existing relationships have shifted, but also where to position their organisation in relation to changing public sector bodies and how to navigate and develop new relationships.

Inter-organisational relationships and associated practices (such as managing contracts between organisations) can be understood as 'field constraints', in that they are well-established practices which are maintained by field members (Dacin et al, 2002; Greenwood and Suddaby, 2006). Consequently, disruption to these normative practices represents a weakening of field constraints, insofar as established ways of working with for example local authority departments are lost. This can therefore be understood as an additional factor within the complex institutional environment for organisational actors to respond to. As relationships break down or disappear, the well-established channels of inter-organisational engagement are lost, and the disruption which is portrayed in actor accounts can be understood as a consequence of losing these well-established practices. The following quote from a trustee in Organisation B illustrates this disruption, particularly in terms of the sense of frustration felt within voluntary sector organisations at trying to keep pace with the rate of change within statutory structures:

> *"I think you're fed up of, of 'you've got to do that now, you've got to do that now, now that's changed'. And part of you just thinks, 'do you know what, we're just going to get on and do our job for a while, and let it settle... and it feels like there's been a lot of that over the past few years, like there's been a lot of 'now that's changing, we've got to find out about that'. And at first I was trying to keep up with everything, and making sure that I was reading everything, and after a while, I just gave up, because you'd become familiar with something, then in a few months it'd changed anyway"*
>
> (Trustee, Organisation B)

Understanding the field structures and associated inter-relationships, as alluded to within the quote above, as field constraints helps us to better understand the actor narratives at the local level, in that it provides a frame of understanding through which to better understand the changes discussed by LIO actors within their accounts.

Existing work which refers to organisational fields (Scott, 2008; Levy and Scully, 2007; Zietsma and Lawrence, 2010) and constraints do not attempt to delineate how individual actors narrate their experiences of constraints, or the weakening of such constraints. This work therefore extends extant theorising, by developing a more nuanced understanding about how shifts at the field level are experienced by individuals within organisations. Understanding such field-level disruption as the second example of weakening constraints within the typology being proposed within this chapter is useful when considering how to develop extant understanding of how field constraints are actually experienced, and narrated, by individuals at the micro level.

The practice implications for voluntary sector organisations of the cuts to local authority budgets and the associated restructuring of local government since 2010 (Painter, 2013) are clearly conveyed within the actor accounts. Reflecting on the societal-level analysis in Chapter 4, we can see how these shifts in practices at the field level are aligned with key institutional messages explored within this first empirical chapter. Shifts in societal level institutional logics embed the ideas of 'rolling back (shrinking) the state' and 'strong market rationality' (Taylor-Gooby, 2012). The actor accounts illuminate the disruption at the field level, and the practice implications of these shifts. Recognising the way in which shifting ideas at the societal-level can lead to field-level disruption, thus weakening constraints in such a way that has implications on the practices of organisational actors from the voluntary sector, extends our understanding of the practice implications of societal level ideational shifts, as illuminated through actor accounts.

However, alongside these narratives illustrating the field-level disruption resulting from the financial implications of the austerity agenda, actors described the ways in which they and colleagues were engaging in work to build inter-organisational collaborations in part to build strength, but also in order to position the sector more effectively in relation to national level policy. Within some accounts, organisational actors explained their approach to inter-organisational collaboration within the current context.

5.2.4 Inter-organisational collaborations

A number of organisational actors described how they are bringing-together new partnerships of organisations, or inter-organisational collaborations (Phillips et al, 2000) in order to strengthen the positions of voluntary sector actors. This approach to partnership working isn't described as a new endeavour, but rather an activity which is taking on new significance in the current climate of weakening field constraints, as one organisational actor explains:

> *"I think there's an awareness that it needs to happen. I think people are aware that unless they start co-operating a bit more, people are going to struggle, if we don't. And there's strength in it."* (Organisation A)

Table 5.2.4 below contains extracts from actor accounts wherein participants are considering their experience of inter-organisational collaborations.

TABLE 5.2.4: Dimensions of inter-organisational collaborations

Dimension	Data
Actors engaging in inter-organisational collaborations in response to field-level shifts	"It just seems to make sense to me, that in these straightened times, and I'm not suggesting that those organisations fold, or morph into one or anything, I think that people should keep their identities, but the idea of having some kind of loose-knit partnership that dealt with that, I think that would work" (Staff, Organisation A) "groups are happy to talk to each other through us, in a sense. It takes the curse off it in a funny kind of way. So that's been really interesting, so we'll probably end up doing more of that" (Staff, Organisations A) "We've actually got a really good partnership of organisations, who probably, if you go back 5 years, probably wouldn't have even spoken to each other civilly. Do you know what I mean? My opening line at the meeting was, it's my old cliché line of, 'they may have lent you a chair in 1974 that you never got back, but you know what, it's time to forget that, let it go and let's do the next thing'. And it gets a bit of a laugh, and then people know what you mean, I think. So if you look at the partners we've got, they've been brilliant. They've all been fantastic. Sharing stuff, suggesting stuff, getting involved" (Staff, Organisation A) "So collaboration has been a huge focus for this

organisation for the last three years...and we've got in our strategic plan what we call some key touchstones in terms of collaboration" (Staff, Organisation B) "you look to reinvest in the smaller partners, right from the smallest to the medium-sized, that you work in partnership, you look to benefit the whole sector and not just your balance sheet" (Staff, Organisation B) "I think from their own perspectives they're saying, 'we do have a history of working together, we do want to support each other, because we're all in it together really. Let's all be in it together" (Trustee, organisation C) "supporting organisations...thinking about positioning themselves differently, supporting them to find other people to collaborate with and to potentially manage better" (Staff, Scoping Interview 2)

As table 5.2.4 above illustrates, LIO actors suggest that they are using inter-organisational collaborations as a way of navigating, and thus responding to, the shifting field context. When considering their activity related to inter-organisational collaborations, these organisational actors describe how the current climate of cuts and field level disruption - borne out of societal level ideas relating to shrinking the state - have led to organisations having to behave differently, work together to a greater extent and in different ways in order to survive at present.

Such collaborative activities are referred to as a way of surviving and of being strong as a sector. It isn't described as a new activity; indeed voluntary organisations are accustomed to working with others in varying forms of partnership (see discussions on various examples of voluntary sector-state partnerships in Lewis, 2005; Morison, 2000; Salamon, 1989). It can rather be described as an embedding of a well-established practice. However, of particular note is the value assigned to such partnerships within the current context of weakened field constraints. The relevance of such collaborations, which are not hierarchical or market driven, have been discussed in terms of structuring newly emerging fields (Phillips et al, 2000) but there hasn't been similar attention on the role such collaboration has in established fields which are experiencing disruption, with resultant weakening of field constraints. This development of the existing literature therefore provides an insight into how such

collaborative endeavours as organisational responses might be examined within other contexts of institutional complexity.

As well as weakened constraints being enacted through loss at the field level (loss of engagement structures; loss of personnel and relationships), additions to the organisational field can also represent a weakening of constraints. By additions to the field, this study is referring to the establishment of new organisations or multi-agency partnerships, and associated new personnel, which are established as a result of new societal policy directions. Their introduction can represent a weakening of constraints due to the lack of established working arrangements, lack of field-level knowledge and the lack of relationships why typify the field at this point of change. These will be explored in more detail below.

5.2.5 New field structures

As well as the experience of dialogue opportunities reducing, and the confusion caused by the cuts to public sector budgets, a further shift at the field level was raised in a number of actor accounts: the establishment of new field structures with which organisational actors must engage and build relationships. This can be understood as a third example within the typology of how actors are experiencing and narrating the weakening of field constraints. The most frequently discussed emerging structure was the Clinical Commissioning Groups (CCGs), which have begun to replace the work of the Primary Care Trusts. Table 5.2.5 (below) presents aspects of the actor accounts, which details their experiences, and perceptions of the process of the new CCG structures emerging.

TABLE 5.2.5: New field structures

Dimension	Data
New statutory sector structures being created which is causing confusion and problems in terms of practical issues such as funding agreements and relationship building	"The Clinical Commissioning Group saying 'well we want to commission work locally', but they don't know what's there to commission. And when they do know, they haven't got that much confidence, because they think that the voluntary sector is the voluntary sector" (Staff, Organisation A) "We've struggled and we've tried hard, and we know we're doing things that they would like, but it's getting very, I think they're so busy looking internally at how they're set-up that they can't really think outside the box. I think that's one of the things about reorganisation. You're so busy coping with things that you can't

	see anything outside" (Trustee, Organisation A) "It's no different to any other area, a bit of a nightmare I think. It's, it's particularly difficult because the CCG is going to cover two local authority areas, which has always been a contentious issue for this area" (Staff, Organisation B) "The bad bit is that [the CCG] really don't understand the sector, and the managerial element did, or more so, so an interesting set of challenges" (Staff, Organisation B) "I just don't think we have the contacts really with the CCG... for sector organisations there's a bit of confusion about who's commissioning them" (Staff, Organisation C)

As new field level structures are introduced to the organisational field, actors describe the challenges posed by these changes, and the work which must then take place, in terms of establishing new relationships, building reputations, and developing working practices. A number of actors point to their experiences of problems caused by, for example, the lack of good working knowledge within the new public body – for example the Clinical Commissioning Group or CCG - regarding voluntary organisations, and associated activities, which exist within their area. A further set of challenges was described in terms of how new structures will manage funding arrangements, as illustrated in the following extract:

> *"I am a bit sceptical... about longer term, how it's going to pan out, particularly when you've got work that may come out [for tender] on a [unitary authority] scale, or whether it will be commissioned through individual local authorities"* (Trustee, Organisation B)

The way in which the accounts detail the challenges surrounding the establishment of new structures and associated working practices within a well-established field, point to an additional source of weakening constraints as experienced by these organisational actors. As practice norms, and thus established ways of working, are lost, these organisational actors describe the barriers they face. This therefore represents a third manifestation of weakened field constraints, as described by the voluntary actors within this study. Once again, developing an understanding of how weakened constraints are manifested and experienced can help to inform future

studies, in terms of attending to the micro-level experiences of change, and how and why change is taking place.

Alongside the aspects of the narratives illustrating the experience of new field structures emerging, it became clear from the accounts that actors were describing the ways in which they engaging in activities designed to promote their work, and the voluntary sector as a whole, to these new structures. Although actors expressed frustration at the problems posed by emerging field structures, within their accounts, organisational actors explained how they were promoting the quality of the voluntary sector in new ways.

5.2.6 Demonstrating and promoting the quality of work in the voluntary sector

One aspect of the weakening field constraints is that organisations are trying to develop new relationships with new personnel, and emerging field level structures, such as the Clinical Commissioning Groups. As was explored above, in such cases, organisational actors describe their experience of people within new statutory structures not trusting voluntary sector organisations and actors (see section 5.2.5 above). However, in response to this, participants in this study described the various ways in which they were trying to forge these new relationships, through proving the quality and worth of their work. Table 5.2.6 below presents a series of extracts from narratives which illustrates this work being undertaken.

TABLE 5.2.6: Dimensions of demonstrating and promoting the quality of the work of the voluntary sector

Dimension	Data
Actors framing the sector in terms of quality and promoting the sector in those terms	*"And what we're trying to say is, 'well, what we'll try to do if find a way of being able to reassure people that, yes, it's the voluntary sector, but they do effective work, this is how they measure it, this is how we can evidence that what they do actually changes people's lives'. So we're not just counting people who came through the door, we're showing the different that's being made" (Staff, Organisation A)* *"The CCG are not happy to invest immediately... so what we did is that we formed a consortium, I'm sure [colleagues] may have told you about it. And that's the reason for the consortium really, to present to the CCG and others, other commissioning boards, the fact that we've got a track record, and we are able to handle..." (Staff Organisation C)*
Considering how the sector can be promoted more effectively	*"specifically about trying to create a sector brand, so we've done a significant piece of research...we're certainly going to be publishing the research, and we'd be really interested in, you know, maybe it's something that could be explored at a national level, because there is, certainly the ethics of the sector are not branded strongly enough for us as providers, there is something about that. So we're going to be doing some other work on that." (Staff, Organisation C)* *"So [the consortium project] is positioning the local sector to go, 'actually Mr Commissioner, we understand why you need to have bigger contracts, to save you money, because it's the transaction costs, you know, you can't have 27 relationships. We'll do that in a consortium approach. So come to our 'farmers market', you haven't got to go to Tescos" (Staff, Organisation B)*

In the extracts above, actors describe the ways in which they are trying to use different approaches to promote the work of the voluntary sector. Within these examples, actors describe their work in terms of pro-actively promoting the sector within a range of contexts, for example in relation to newly emerging Clinical Commissioning Groups, or within the context of impact measurement.

Recognising this actor response illuminates the way in which organisational actors describe their engagement with the challenges posed by the shifting organisational field. Considered another way, it surfaces aspects of the actor accounts through which they describe how they are using the weakened field constraints and engaging in practices to reconfigure field relationships, and position their organisation, and the wider organisational population, in a more favourable position in relation to critical resources (Greenwood et al, 2011).

For example, in an attempt to build new relationships with the emerging Clinical Commissioning Groups, one member of staff in Organisation C discusses a particular approach he has devised which is aimed at developing an evidence base around quality of work in the voluntary sector:

> *"We used some of [the funds] for admin, and then the rest of it we've used for an internal competition to get groups involved and to demonstrate the achievements of the groups" (Staff, Organisation C)*

This example illustrates the work being undertaken in order to re-establish field-level relationships. Actors describe how they are trying to establish new field constraints, or institutionalised rules of engagement (Phillips et al, 2000), and agree a new version of local social order (Fligstein, 2001). When discussing why they are doing this, actors describe the need for institutional clarity, for recreating those inter-organisational relationships in order to support effective service/activity development and delivery.

5.3 Conclusion

This chapter has surfaced an important aspect of the relationship between societal level ideas, as constructed and communicated through institutional messages, and the accounts of actors within local infrastructure organisations. The ways in which organisational actors narrate their experience of field level changes have been surfaced, along with the way in which they describe their responses to the shifting context. Considering this micro-level analysis against the backdrop of the societal level discursive analysis of documents, the discussion has considered the links between shifts in ideas nationally, and how individual actors experience the impact at the local field level.

Exploring the shifts at the field level as weakened constraints has enabled me to consider how actors are exploiting instances of weakened constraints as resources to develop and promote new ways of working together, new ways of developing relationships, and new ways through which to promote the work of the voluntary sector. In short, actors are working to re-establish institutional features, or constraints, at the field level, which could, in time, have implications for their organisational survival (Greenwood et al, 2001), using the discursive space afforded in part by the weakening of constraints at the field level.

The following chapter now looks in more detail at the accounts of the LIO actors, exploring the extent to which actors are using the space created by field-level shifts explored within Chapter 5, to engage in identity work against the backdrop of multiple and shifting logics as supported through the messages in national documents.

6. DISCURSIVE IDENTITY WORK: EXPLORING ACTOR NARRATIVES

This thesis has thus far explored the way in which national documents (such as policy documents) act as institutional messages which construct and convey multiple institutional logics, or belief systems and "principles guiding field participants" (Reay and Hinings, 2005:354) within the voluntary sector. The subsequent empirical chapter (Chapter 5) proceeded to explore actor accounts in order to surface the field-level changes which were being narrated, and how such changes could be understood as a weakening of field constraints, and how this in turn can create discursive space for actors at the field level. Returning now to the actor narratives, this final empirical chapter considers how actors engage in identity work within the discursive space provided, using the logics surfaced in Chapter 4 as resources within this work.

In doing so, this chapter builds on the small but growing number of studies, which take the micro level of institutional context as the focus (see van Dijk et al, 2013; Zietstma and Lawrence, 2010). The discursive relationship between messages surfaced at the societal level, and the discursive dimensions which are apparent in accounts of actors at the local level, is explored. In pursuing this discussion, this chapter considers the following research question:

> *"What rhetorical strategies do LIO actors adopt as they engage in debates over ideas about the role of the sector, the state and the state-sector relationship?"*

This discussion explores the ways in which actors within their narratives construct messages relating to identity, and considers the extent to which the messages within actor narratives correspond or depart from messages prioritised at the societal, or national, level. In so doing, this chapter makes two central contributions to knowledge.

First, I illustrate how relatively powerless actors within LIOs are using multiple, and contradictory, logics (as explored within Chapter 4) as critical resources in their identity work[11] in order to resist messages conveyed by national government whilst retaining coherence, or legitimacy. This chapter builds on the small amount of extant work which considers how actors engage in forms of identity work in order to align with, or

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[11] Identity work is the process by which actors work to shape a coherent identity in the face of numerous social identities available to them (Watson, 2008; Creed et al, 2010)

distance from, institutional logics (see for example Chreim et al, 2007; Gawer and Philips, 2013; Kodeih and Greenwood, 2014; Lok, 2010; Rao et al, 2003). I then develop extant understanding specifically by demonstrating how actors within LIOs engage in identity work as a form of *resistance* by using multiple logics as critical resources (Hargreaves and Van de Ven, 2009), using the discursive space afforded by instances of weakening field constraints discussed in Chapter 5 aligning and distancing from favourable or non-favourable belief systems, or identity cues. This work surfaces the active nature of identity work, challenging the tendency in extant scholarly work to present the voluntary sector as passive within its contexts (Acheson, 2014).

Within this exploration of the identity work undertaken by LIO actors, a secondary contribution is made to extant voluntary sector scholarship. This study builds directly on a study by Taylor and Warburton (2003), surfacing how a shift has taken place from actors prioritising the voluntary sector's political identity under a New Labour administration, to prioritising the moral or normative identity within the Coalition era (2010-2015). Building on this extant work, this study is able to surface the way in which actors are adept at shifting identity priorities in response to a shift in national messages prioritised by Government.

This chapter begins by introducing the theoretical concepts which have been used in order to explore the data and address the above research question. First, the concept of identity work will be introduced, and explained as an example of institutional work. The section which follows will revisit the institutional logics surfaced within Chapter 4, explaining how logics are characterised within this chapter as a resource for identity work. Following the discussion of the theoretical concepts underpinning this chapter, the empirical work will be presented. This starts with a presentation of data which illustrates how, during the period characterised by the Coalition administration (2010-2015), actors are prioritising the voluntary sector's normative identity. The chapter then goes on to discuss how actors are articulating the differences and distances between the voluntary sector and the state, including direct critique from within actor accounts of the state and statutory approaches to welfare services and the management thereof.

6.1 Identity work as an example of institutional work

Within Chapter 4, the discussion surrounding the empirical work demonstrated how the discursive devices used within documents can position and characterise the voluntary sector in a variety of ways. The documents can thus be characterised as institutional messages which promote a form of 'institutional identity', which has been defined as "the imagined characteristics of the targets of policy...which justify policy decisions" (Loseke, 2007: 661-662). An institutional identity includes understandings about organisational behaviour (King, Clemens and Fry, 2011), and is often discussed in terms of 'outside' groupings, such as intermediaries, pushing or encouraging identities onto groups (Kodeih and Greenwood, 2014). Kennedy (2008) highlights the tendency within much extant work to converge on the premise that actors respond to cues and do not tend to deviate from a socially sanctioned 'norm' due to the risk posed by sitting outside of the group, for example losing access to resources. We thus return to the presentation of passive actors, responding to external cues.

However, as has been noted above, it has been suggested that actors at the micro level are not merely passive recipients of the messages produced at the societal level (Collinson, 2003). Indeed, in order to explore agency within institutional theory, a significant body of work is building surrounding the concept of institutional work, which has been defined simply as, "intelligent, situated action", (Lawrence and Suddaby, 2006: 219), and:

"*The efforts of individuals and collective actors to cope with, keep up with, shore up, tear down, tinker with, transform, or create anew, the institutional structures within which they live, work, and play, and which give them their roles, relationships, resources, and routines*"

(Lawrence et al, 2011: 53).

It is a concept which has come to the fore in recent years due to the need for scholars within institutional theory to confront issues of agency. This is in response to the central critique of new institutionalism which suggests that actors are treated as passive recipients of institutional order (Scott, 2008), or 'cultural dopes' (Hirsch and Lounsbury, 1997; Powell and Colyvass, 2008). Institutional work has therefore been an important development within institutional theory, due to the way in which it

effectively introduces the concept of agency. Acknowledging instances of institutional work makes it possible for scholars to theorise how actors engage with, and even change, their institutional context (Seo and Creed, 2002). Rather than reifying institutions as being something external to actors, it shifts understanding of institutions to their being "constituted in the conscious action of actors" (Lawrence and Suddaby, 2006:219).

This introduces a contradiction; how actors at once passively respond to identity cues from the societal level, whilst also engaging in struggles over identity. The way that this tension, or conflict, has been theorised within institutional theory is via debates surrounding embedded agency (see for example discussions of embedded agency in Battilana and D'Aunno, 2009; Lawrence et al, 2011). In brief, embedded agency asks how agents can affect the institutions within which they are located (Holm, 1995). The concept of 'institutional work' (see for example, Creed et al, 2010; Gawer & Phillips, 2013; Smets & Jarzabkowski, 2013; Ziestma & Lawrence, 2010) therefore helps to consider active work within the context of institutional constraints.

This concept of institutional work helps our understanding of the active 'work' that actors engage in to consolidate, align or shift identity, within their narrative accounts. Identities, and identity work, involve power struggles (Jenkins, 1996: 25) and can be considered ongoing projects which are constantly being negotiated or fought (Watson, 2008). Jenkins (1996) suggests that "identities exist and are acquired, claimed and allocated within power relations" (p25). One definition of identity work is the way in which people are "engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness" (Sveningsson and Alvesson, 2003: 1165). Thus, recognising identity work as a form of institutional work is useful, as it acknowledges the active nature of negotiating or defending identity as an important feature of the institutional context. Exploring the actor narratives within this study surfaced that, whilst actors engaged with ideas related to organisational and particularly voluntary sector identity, it was useful to consider *how* they were actively tinkering with discursive elements of their institutional context – where actors discursively located organisations, and the sector, in relation to other sectors and why.

This study focuses on actor narratives through the analysis of a series of actor accounts, and suggests that discursive strategies are used by actors in order to engage with the beliefs and associated practices within institutional logics at the societal level. In Chapter 4, the discursive analysis of national documents demonstrated how messages at the national level were shifting, but also how there were multiple logics 'at play' during a given era. Considering in particular the way in which the state is prioritising different roles (and thus associated identity cues) for the voluntary sector within these documents, analysis at the micro level can uncover the extent to which these societal shifts correspond with shifts within narratives at the micro level, and how relatively powerless LIO actors at the local level within voluntary organisations, deal with the voluntary sector identity cues within their individual narratives.

The stability of particular identities is also important when considering how actors within the voluntary sector privilege certain identity cues over others. Certain identity cues have become enduring, or stable, and have therefore become sufficiently 'real' and thus take on a normative quality throughout the population (Kennedy and Fiss, 2013). This takes on particular relevance when set against the efforts of the state to diffuse certain identity cues and introduce others within institutional messages. One way in which an identity becomes 'real' is in securing an element of cultural support (Meyer and Scott, 1983) which can also be understood in terms of how an identity is 'legitimised' (Goodrick and Reay, 2010). The literature on legitimacy is vast, and will not be considered at length within this study. However, the act of legitimising (Greenwood et al, 2002) – or how an identity becomes perceived as "desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions" (Suchman, 1995: 574) - is useful here, because it helps to unpick why certain identity work is being done within a given era.

Recent studies surface how organisational actors conduct identity work which aligns with well-understood norms and practices of the field in order to achieve legitimacy of identity (see for example Gawer and Phillips, 2013; Glynn, 2008). The gap emerging within this body of literature is how identity work is conducted to engage in resistance rather than alignment, whilst not standing outside of the sanctioned 'norms' of the field. This study responds to this gap, and develops current understanding by surfacing the ways in which LIO actors engage in identity work which seeks to align with one

identity norm, whilst challenging another. Storytelling, or 'mythologizing', is one form of identity work, which at once embeds a sense of security in their position (Westerholz, 2006) but also ties the actor to a well-rehearsed identity cue. Where this study develops existing debates is in the focus on well-established identity, and how storytelling can be an important device in maintaining and adapting identity. Extant work (see for example Westenholz, 2006) explores how actors engage in field stories when negotiating emerging identities, and it is useful to observe the significance of storytelling in this alternative context of well-established, enduring identity cues associated with a mature field.

Storytelling has been explored in many organisational contexts. For example, Scully and Creed (2005) explore storytelling as a device to instigate organisational change; Creed et al (2002) consider how stories can be aimed at altering other institutions; Chen (2013) studies storytelling as a means of demanding accountability within an organisation. However, storytelling as a device or tactic within identity work within a shifting institutional context has not been considered, and this is a gap to which this chapter responds.

6.2 Logics as a resource for identity work

Surfacing the multiple logics constructed and communicated within documents (see Chapter 4) was an important and necessary starting point for a consideration of how actors within LIOs are using these multiple logics as a resource within their identity work. The micro-level analysis presented within this chapter illuminates the puzzle of how organisational actors are using instances of weakened field constraints (loss of established partnership structures or established ways of pursuing inter-sector communication, for example) and responding to the relative complexity of their institutional context (Greenwood et al, 2011).

A small but growing body of extant literature has started to explore the way in which institutional logics can be used as resources in identity work. Studies have explored how actors engage in identity work in order to align with a logic shift (Lounsbury, 2001) or indeed to resist a logic shift (Marquis and Lounsbury, 2007; Townley, 1997). However, there remains a gap in understanding how actors use multiple logics in their identity work in order to simultaneously resist and align with logics, and what this

means in terms of the agency of LIO actors. Work has been undertaken to consider how actors subtly challenge identities associated with a new logic, whilst publically accepting the logic shift (Lok, 2010) but once again, this fails to consider the part that multiple logics can play in the ability of micro level actors to openly resist a logic within their narratives, whilst retaining legitimacy of identity via aligning with an alternative, yet coherent and accepted logic.

The data which is discussed within this chapter surfaces the ways in which actors align or distance from institutional logics which were surfaced within Chapter 4. As the discussions surrounding the empirical work refers back Chapter 4, below is the summary table (6.2) which presents the institutional messages relating to voluntary sector, the state and the relationship between the two, which were surfaced within this discursive analysis of documents.

TABLE 6.2: Logics summary table

Era		State identity	Voluntary sector identity	Relationship
1979-1997	**Belief systems**	Small state and competitive market for public services	Voluntary action is historical, a deep-rooted human impulse, has qualities which are well-understood	The state and voluntary secto should operate in separate spheres
	Associated practices	The state should have a limited role in service delivery; should not have direct the voluntary sector, but provide a context in which organisations can operate well.	Voluntary organisations can get closer to communities, flexible, innovative, operate at a lower cost (as compared with the state)	The state should not interfere with voluntary sector organisations and their activit
1997-2010	**Belief systems**	The state has a central role to play in society; principle of 'mixed economy' with regard to public services	The voluntary sector has enduring qualities; has a role in improving civic life; should exist within a mixed economy of public services	State-voluntary sector partnership
	Associated practices	The state should be involved in service delivery, but alongside the voluntary sector (via a competitive market)	Voluntary organisations have a range of strengths with regard to working with disadvantaged communities; must improve its performance, develop and modernise	The state and the voluntary sector should work closely together in order to help to change society, and realise greater outcomes
2010-present (2014)	**Belief systems**	Small state, competitive market for public services; communities should have more power over decisions which affect them	Voluntary groups have enduring qualities; have community obligations; should behave more like private sector entities	The state should reduce its interference with voluntary sector organisations and oper more within separate sphere
	Associated practices	The state should have a reduced role in service delivery, and transfer power to communities.	Voluntary groups should be able to behave like private entities, play a role in an open market with relation to public service	The state should allow volunt groups to operate independe

	delivery; voluntary organisations should play a greater role in strengthening communities

As Table 6.2 above illustrates, the national documents analysed surfaced the degree of institutional complexity generated by aligning with multiple institutional logics. This work demonstrated the way in which these national documents constructed institutional messages which conveyed this complexity. As the targets of such documents, voluntary sector actors are faced with this multitude of institutional logics, and this complexity is consolidated over the different political eras explored. For example, with the election of the New Labour administration in 1997, the voluntary sector is at once discussed within the context of community empowerment obligations, whilst also being framed by discursive features consistent with market rationality, discussing how voluntary sector organisations could become more efficient and effective deliverers of public services (see for example Cabinet Office, 2006; DCLG. 2007; Treasury, 2002). Such competing logics set the scene for identity work at the micro level.

6.3 Analysis

The presentation of the empirical work which follows explores two central aspects of LIO actor identity work. The first is the work undertaken to align with a normative, well-understood institutional identity: the voluntary sector, alluding to notions of collective ethos, mission and values. The second aspect of LIO identity work explored is the work which is undertaken to resist or directly challenge the logic of market rationality, and critically the way in which the voluntary sector's service delivery role is being emphasised at the national level. This second empirical section includes the presentation of a number of discursive devices which are used by actors within their accounts to embed this resistance. These include engaging in comparison between the permanence of the voluntary sector and the impermanence of state approaches (6.4.1) distancing the voluntary sector from the state (6.4.2) and critiquing the state and the private sector (6.4.3). In particular, the extracts displayed here surface how actors unpick the role-identity assigned to the sector within the market rationality approach to service delivery.

6.3.1 Voluntary Sector Identity: Definitive ethos, mission, values

Within the accounts, actors referred to the voluntary sector in a number of different ways. One form of institutional identity that ran through many narratives related to

the ethos, values or 'guiding principles' of the voluntary sector. Actors talked about these as central characteristics of voluntary organisations, of the voluntary sector as a whole, and as points which distinguished this population of organisations from statutory organisations or private sector entities.

Table 6.3 below presents a series of extracts from the accounts of voluntary sector actors which discuss normative characteristics of the voluntary sector. These have been grouped into a series of dimensions which were surfaced through the analytical process (described within the Methodology, Chapter 3)

TABLE 6.3.1: Identity work based on normative identity cues

Dimension of identity work	Data
The voluntary sector holds communities together and effects change at the local level	*"We're trying to grow voluntary and community action, as the glue that holds communities together. So you're not wanting a bidding war, you're wanting to be able to invest in people that are doing things, and support what's going on" (Staff, Organisation A)* *"You have to invest in local activists, the local institutions that are the glue that makes things work, invest in things that make life better, and that's different [to public service delivery]" (Staff, Organisation A)* *"And I think the growing your own is the main value statement for those local providers, that they are skilling up the local community and that they understand particularly those ones that work at neighbourhood level, what community resilience really means, and it's a very bandied word at the moment, by the government."* (Staff, Organisation B)
The voluntary sector is strong and has an enduring mission	*"What wins people over, particularly in the voluntary sector, is your values and your mission statement" (Staff, Organisation B)* *"Our mission, and our mission will stand, and regardless of whether we get the tender or not, our mission will be the same, our mission and the role of the organisation will stay the same, it's just how we do it will be different", (Staff, Organisation C)* *"strategically, even when you're being quite innovative, you need to be clear about and have a sort of checklist...you've got your mission and vision and*

	strategic areas...you know, parameters and checklists and criteria for making decisions about things which bring you back to those really essential points, to make sure that you area guided in your decision-making" (Staff, Scoping interview 2)
The voluntary sector is guided by core values and ethos	*"What makes us different? We are value-based organisations and groups, whether we have articulated that clearly or not. The public sector and business might like to say that they are, but they will only ever skim the surface of that, we're the only ones that can do that, and that's exactly why we should be involved"* (Staff, Organisation B) *"people are starting to be more careful about organisational identity...which is, 'how do I link this back to the values in my organisation and what I do?'" (Staff, Scoping interview 4)* *"It's integrity as much as anything else. Integrity and ethos of the organisation, it's the ethos of an organisation that has an integrity of its own, so they do know what they're getting and what the values are."* (Trustee, Organisation A)
The voluntary sector sticks to its guiding principles	*"I think the reason it hasn't changed are probably two reasons. The first is that there's a need for the role that it undertakes. The level at which it's recognised fluctuates, which we might get onto. But essentially the need for a neutral broker between the non-profit sector and public bodies is needed now as much as ever. So it's partly that. The other is that the trustees, down the generations, have stuck to the guiding principles within which the organisation was founded." (Staff, Organisation A)* *"each organisation should look to its core function as an organisation, and its objectives and understand whether or not, as a result of them getting involved in public service delivery, does that still meet the core aims and vision of their organisation"* (Staff, Scoping interview 3) *"There's a huge danger...if you lose sight of what you are, what you're there to do, because you're surviving. What you're surviving for, is you're surviving to survive" (Staff, Scoping interview 5)*

The importance of charitable identity	*"We flirted with the sort of social enterprise idea, because it sounded sexier, it sounded like you were going in a different direction, but we've actually pulled back from that now, said no, we are a charity in the way that we describe ourselves, because we are very proud of our heritage, and I think when you get in, you know, there are so many different terms going now, there's charity, third sector, there's voluntary sector, and then social enterprises has come along and really muddied the water...I think there's been a conscious effort really to drop the social enterprise idea really, because it more identifies you into what your core values and purpose are"* (Trustee, Organisation A) *"We're a charity; we have a culture that's done us very well over the last [X] years. People know what they're getting when they work with us, and we work very differently to both the public and private sectors, and we should actually celebrate that rather than try to morph into something that we're not"* (Staff, Organisation A) "I think there are opportunities for the sector, because, generally, people will trust the sector, and think, "...they're not in it for profit, they're in it because they're a charity, the people who are involved in it want to do good things" (Staff, Scoping interview 5)

When considering how actors have discursively presented these features within their narratives, it is interesting to note that actors appear to be harnessing and prioritising identity cues which are well-understood, and well-rehearsed within a voluntary sector context (Cairns et al, 2005; Tonkiss and Passey, 1999). Familiar characteristics are used, which are related to the values or core role of the organisation, for example:

> *"So there have been points where the organisation has had to make a decision that it is going to do something, or not going to do something in order to stay true to its role, function"* (Staff, Organisation A)

Actors are prioritising aspects of their identity which are well-understood, such as being 'value-based', or being guided by a voluntary sector 'ethos'. In so doing, they are aligning themselves, their organisation and the voluntary sector with images of the sector which are considered legitimate (Taylor and Warburton, 2003). Scott (1995)

labels these characteristics 'normative', centring on a shared understanding of the core values to which groups and individuals can associate themselves.

These characteristics, or identity cues, chime with those surfaced within the societal level analysis associated with the 'enduring voluntary action' characteristics of the overarching logic (for a summary see table 6.2 above). LIO actors at the micro level actors are thus drawing down identity cues within their own identity work which were surfaced within the societal level documents across all three eras. This would suggest that actors at the micro level are using the identity cues associated with the enduring voluntary action logic as critical resources within their own identity work, or within a broad cultural 'toolkit' (Swidler, 1986) in order to embed a particular role-identity for the voluntary sector.

In drawing upon the well-understood and widely acknowledged ideas associated with the voluntary sector (Lewis, 1996) actors are effectively legitimising a particular institutional identity. This kind of identity work involves presenting this organisational population, or sector, in a particular light, locating and identifying with a specific 'conceptual system' (Rosa et al, 1999: 64). So when an actor within one of the study's scoping interviews stated that:

> *"an organisation should have the* ability to, I think, *respond to need which fits in with the ethos of their organisation" [Staff, Scoping interview 3]*

Emphasis is placed on aligning organisational activity with a particular 'ethos'. The actor does not proceed to define what they mean by ethos, nor confirm how people can identify what an organisation's ethos actually is. It is therefore not explicit what or how activities could be aligned with this 'ethos', and this all contributes to the assumption that 'ethos' within the context of the voluntary sector is something which will be understood. This is legitimising particular identity cues, associated with the well-rehearsed aspects of voluntary sector identity.

Legitimising an identity is an important form of identity work which can effect institutional change (Goodrick and Reay, 2010). In effect, actors are embedding normative, or moral, identity cues over and above others. In surfacing how actors in the era of the Coalition administration prioritise the normative, moral aspects of the

voluntary sector's institutional identity, this chapter builds on the work of Taylor and Warburton (2002)[12], who concluded that organisations prioritised their political legitimacy (i.e. organisations prioritised representative capabilities and cross-sector partnerships) within New Labour's first administration. The discursive study of national documents within this thesis (Chapter 4) surfaced the significance of the partnership logic during New Labour's administrations[13], which is coherent when considering the opportunities afforded to voluntary organisations during this period to 'get around the decision-making table'. In other words, it makes sense that organisations during the New Labour era sought to take opportunities to discursively align in a closer partnership with the state when this was a government priority.

However, the empirical analysis in my study demonstrates how organisational actors may be adept at shifting the focus of their identity work as a shift takes place in the dominant logics of an era. As the current political administration has reduced the focus on partnerships (Lowndes and Pratchett, 2012) this study suggests that organisational actors in the voluntary sector are now engaging in different kinds of identity work, prioritising normative aspects of the voluntary sector identity, and thus promoting a different institutional identity for the sector.

Noting this shift in priorities at the micro level, the dynamic process of identity work is illuminated. Where it has been acknowledged that the maintenance of identity is essential to institutional survival (Selznick, 1957) attention has not been given to the *tactics* engaged by micro-level actors in order to assert an institutional identity, and how the priority of such work shifts over time. Developing a better understanding of this temporal process can inform debates about the significance of identity work at the micro level, and the ways in which actors adapt to the shifting context. This in turn illuminates existing discussions which consider the relationship between logics and discursive work (Lok, 2010) as it demonstrates how actors at the micro level engage with logic shifts via their discursive work.

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[12] Both this thesis, and Taylor and Warburton (2002) explore the frames of understanding (Maguire and Hardy, 2006; Suddaby and Greenwood, 2005) which are used in order to resonate with a well understood and widely accepted organisational 'type'.

[13] See Chapter 4 for a discussion of the partnership logic in the New Labour administrations

Where there has been significant focus on how groups go about achieving legitimacy (Navis and Glynn, 2011; Wry et al, 2011) there has been less consideration of how existing organisations in well-established populations and fields shift the focus of their identity work in order to maintain the legitimacy of their identity across shifting political eras. In helping to illuminate an important aspect of this process within a voluntary sector context, this study develops existing understanding about how voluntary sector actors can be active in the process of re-legitimising a historical role-identity as the institutional context shifts and attempts to change role-identities for voluntary organisations.

When considering Table 6.3.1 above, there are a number of extracts which highlight points when organisational actors have had to make choices, or act, in order to maintain this aspect of their identity. For example, the chair of trustees for Organisation A talks about the central place of 'ethos' and the need to protect this characteristic:

> *"One of the main things that, as chair, that I try and protect is the ethos that it does what it was set up to do. And within that it's a very wide remit, but it's got to be doing that, and I've worked in the voluntary sector for many, many years, and you see organisations that get seduced into going down ways that are not really their mandate" (Trustee, Organisation A)*

The level of effort referred to by this extract provides some insight into the active nature of the identity work being undertaken at the local level. Here, actors are not simply referring to aspects of the identity of their organisation casually or passively. Instead, actors convey the way in which they work to achieve and maintain this institutional identity. The following extract highlights this active work poignantly:

> *"You look to benefit the whole sector and not just your balance sheet, that you hold on tightly to your value base and test yourself with a fierce determination around that." (Staff, Organisation B)*

The cases of identity work explored above, and in Table 6.3, are examples of work which focus on characterising and positioning the voluntary sector identity, but it is also interesting to consider how they are also examples of storytelling about the sector

and its identity. Storytelling emerges from the data above as a central vehicle through which actors convey the institutional mythology of the voluntary sector, i.e. the enduring, culturally-laden identity markers (Hannen, 2010). For example, within this extract, this actor from Organisation B is embedding the power of the sector, through emphasising the scale and longevity of the sector and what organisations can achieve collectively:

> *"The power is in the people, the sector is still these thousands of volunteers and all these service users and you know, unless organisations totally go under, that's there, that's always at our finger tips, and I'm always saying 'this is in our grasp people'"*. (Staff, Organisation B)

This is a useful example of how actors converge on an institutional 'script' which presents well-understood, and unchallenged stories which contribute to, and build upon, the identity of the voluntary sector. The presence and persistence of such 'institutional myths' (Deephouse and Suchman, 2008) may actually be a central aspect of the "cultural repertoires of meaning that organizations appropriate" (Glynn, 2008: 421) when reflecting on their identity, particularly in relation to other groups such as the state or private sector service providers. The focus on this kind of cultural repertoire may also shed light on a degree of potency, or 'cultural power', surrounding the voluntary sector identity, and in particular, the identity cues associated with normative, or moral, legitimacy. Glynn (2008) suggests that cultural power stems from institutional 'situatedness', as opposed to individuation and distinctiveness, and this does appear to be playing out within the local voluntary sector context as explored within this study. This is also a particularly important observation when considering the context of weakened field constraints which characterise aspects of the field. Where established norms or constraints are weakened (as discussed in Chapter 5) the work of LIO actors to assert the cultural potency of the voluntary sector identity becomes of greater importance.

As well as engaging in this kind of 'positive' identity work (i.e. aligning with the enduring voluntary action logic characteristics), actors within this study engaged in identity work which effectively distances from an alternative logic which is coherent at

the societal level – the market rationality logic. This identity work will now be discussed.

6.3.2 Identity work: devices to resist identity cues associated with a dominant logic

When exploring identity work which is undertaken to distance from cues of an institutional logic, such as market rationality, a number of nuanced discursive practices can be surfaced and discussed. The first example of this which will be discussed demonstrates how actors within this study draw comparisons between the voluntary sector, and the statutory and private sectors. Within these examples of identity work, voluntary sector actors characterise the voluntary sector in relation to others. This broader identity work will now be explored.

The data presented below surfaces a number of ways in which actors within this study draw comparison between the voluntary sector and the state. The first example displayed and explored (Table 6.3.21) is how actors portray the voluntary sector as a long term, or permanent feature of society, as compared with the impermanence of state policy approaches.

TABLE 6.3.21: Comparing the permanence of the voluntary sector with the impermanence of government

Dimension of identity work	Data
Permanence of sector	*"Because this stuff comes in cycles anyway, doesn't it? Because in 10 years the world will have changed again. Because, I'm old enough to remember what it was like in 1980 when everybody said that it was the end of the world, and everything was falling, the wheels were falling off. And, you know, we kind of got through that and things changed, and things changed again, and it will happen."* (Staff, Organisation A) *"[A national organisation] won the contract; that contract's finished because [that organisation] didn't deliver it very well, [that organisation] has gone, 'bye, we're leaving [this area] thanks'. If it'd been local providers they would have, you know, they're there for the long term"* (Staff, Organisation B)

	"Society is a long term evolution. Society, whether big, small or medium sized, is a long term thing. It's a cultural thing that has grown up... society just goes on. And that's why, I think, institutions like (this organisation) need to be there. Back to this rock thing, as a balance, as a reference point" (Trustee, Organisation A) *"I think it's cyclical, I think irrespective of who's in government now, it will keep happening. We've been here before, and the sector will still be around, it will look very different, but it will still be around. And when new groups are setting up, they will still be looking at their mission, their aims, their values, and you know, that's the nature of it" (*Staff, Organisation B*)*
Impermanence of state approaches	*"[the government has] got ideas which aren't followed through, then things get tied up in politics, and it's clear that there are, I think one thing that virtually everybody on the ground would say, in every field, is that the rate of change is too great"* (Trustee, Organisation A) *"I would almost guarantee that before the next election, there'll be some form of small grants programme for small organisations...I'd be amazed if they don't. Because as the election starts to loom, they'll want to be able to say, 'you know, we've been able to start putting money back into local things'. It's bound to happen, it's bound to happen. But the sector, whatever the sector is, will survive this. It's survived worse"* (Staff, Organisation A) *"[The Government] have got very clear areas where they want changes, 'we want these changes and we want you to implement these changes. And we want that done in this timeframe.' And often that timeframe is unrealistic, sometimes those changes are unrealistic"* (Staff, Organisation C)

The series of extracts above surface how actors are embedding a sense of permanence of the voluntary sector. It is particularly interesting to consider that these statements of permanence are being made within a time of pressure on all sectors, with the austerity agenda heralding severe cuts to public sector budgets (Lowndes and Pratchett, 2012) which in turn impact significantly on many voluntary organisations

(Corbett and Walker, 2013). For example, this staff member from Organisation B makes the following statement about the nature of the sector, and how its permanence cannot be destroyed:

> *"We are so many and so diverse and so creative that you can't destroy that. So it'll come out somewhere else, even if those big organisations don't do it the way they always should have done"* (Staff, Organisation B).

Such references assign human characteristics to the voluntary sector, i.e. creativity. Assigning such a strong, resilient character to this grouping of organisations further embeds the enduring nature of the sector. As well as assigning human characteristics to the sector of organisations, this actor from Organisation A alludes to a permanence of the sector being linked to the human urge to act:

> *"The sector's been around for a very, very, very long time, whatever it's been called, because people will always want to do things, won't they? Most of the groups and organisations that we know started because someone went, 'that needs doing, let's just go and get that done' (Staff, Organisation A).*

This allusion to a deep-seated human trait, i.e. the 'need to act', speaks to the 'enduring voluntary action' institutional logic characteristics explored in Chapter 4. Messages, particularly from within the New Labour and Coalition eras, refer to the human instinct to act to improve society, and we see this idea reflected in the actor narratives also. However, the way in which actors draw comparisons, particularly with government, draws additional dimensions into this institutional message, suggesting that the sector's permanence is in contrast with the short-termism and associated rate of change reflected within state approaches. For example, this trustee from Organisation A suggests that the rate at which national government introduces changes is challenging for organisations at the local level:

> *"The number of changes, which are one manifestation of what we call bureaucracy but have a life of their own, they are too frequent because people who want to be doing things on the ground, don't want to be coping with that level of change. And I suspect that a lot of it is driven by political point scoring and political ambition"* (Trustee, organisation A).

This extract displays a further dimension of the comparisons drawn between the state and the sector. Where the sector has been linked to laudable characteristics of 'creativity' and 'diversity', the state's approaches here are linked to the more questionable acts of 'political point scoring and political ambition'. Such allusions sit in stark contrast to the more altruistic attributes assigned to the voluntary sector. Such contrasts act as a way of discursively separating the sector from the state.

This observation is the first example surfaced of the way in which actors are using such comparisons as a discursive device which in effect uses the discursive space created by multiple logics of a given era (Hardy and Maguire, 2010). Within this discursive space, actors are able to draw sharply defined boundaries around both the voluntary sector and the government, highlighting the core differences between the two. With the boundaries firmly drawn, space is then created between the two and further identity work can then take place.

Table 6.3.22 below presents further extracts which display how actors from voluntary organisations discursively separate the voluntary sector from the state. Having first considered the juxtaposition of permanence and impermanence, the extracts from actor accounts below surface further examples how actors demonstrate the distance between the voluntary sector and the state. Table 6.3.22 first presents examples whereby actors allude to the sector's independence then presents extracts wherein actors are questioning the state's knowledge and understanding of the voluntary sector.

TABLE 6.3.22: Discursively demonstrating the distance between the voluntary sector and the state

Dimension of identity work	Data
Discursive separation between the voluntary sector and the state	*"Sometimes they think in the council and the NHS that their money is the only money, and therefore they have an overly paternalistic attitude towards the sector, and of course the sector will say, 'well legally that doesn't fit with our mission, so stuff off. I can't just turn around and do what you want me to do, because I have a board of trustees, and charitable status that I must stick to.' So it's those strands which means values are more than a golden*

	thread, they're a legal framework, aren't they?" (Staff, Organisation B) *"Well, because some of the voluntary sector isn't funded by the local authority or the government, they don't give a stuff what's going on governmentally, and haven't done for the past 10 years. They work to their own agenda, they're self-sufficient"* (Staff, Organisation B) We can do that because we're not a local authority... And I think that's the power of the sector; I think we're small enough to still genuinely, and not as throughout the health and social care rhetoric, have patients at the centre, or people at the centre of what we do" (Staff, Organisation B)
The state doesn't understand or have knowledge about the voluntary sector	*"I don't think this government believes anything it says. I don't think it believes anything about the Big Society. It's a construct that helps them, that justifies to them what they're doing, I think." (Staff, Organisation A)* *"I don't think they understand the sector, I don't think they want to understand the sector"* (Trustee, Organisation A) *"So everything that the government minister involved has said about [community organisers], that I've heard him on record saying, I just don't think he gets it. I don't know, I don't think so, I think they have a very simplistic understanding, and it's all very nice to live in that naïve world, that they seem to live in on a number of policy agendas, but you know it's not going to result in what it could."* (Staff, Organisation B)

The extracts in Table 6.4.22 above illustrate how actors are discursively embedding a sense of distance between the voluntary sector and the state. In surfacing how organisations within the voluntary sector are not financially dependent on statutory agencies, and questioning the extent to which the state understands the sector, actors are once again using discursive space created by multiple logics, and thus multiple coherent identity cues (Hardy and Maguire, 2010) in order to engage in their own identity work.

For example, in the following extract, this actor from Organisation C is highlighting that the state does not appreciate the particular value of the sector:

> *"Even though at the same time, they're saying that there's much value in the sector, and they want to keep the sector around, keep the sector alive, I don't think they recognise and understand what the sector really does, and the value of the sector"* (Trustee, Organisation C).

Through embedding this familiar message about the value of the sector, but raising the idea that the state does not understand this value, this actor is confirming both the difference between, but also the distance between the two.

A discursive technique which has surfaced within this study of actor narratives is the way in which organisational actors engage in discursive work which critiques the work and approach of national government. Working from a coherent and secure identity standpoint, i.e. identity aligned with normative identity characteristics, subsequently organisational actors within this study seem able to articulate a series of openly critical reflections on the state, such as its deceit, and impermanence of policy approach. The extracts in Table 6.3.23 below illustrate a number of these critical statements:

TABLE 6.3.23: Voluntary sector actors critiquing the State

Dimension of identity work	Data
Critiquing the state	*"I would almost guarantee that before the next election, there'll be some form of small grants programme for small organisations...I'd be amazed if they don't. Because as the election starts to loom, they'll want to be able to say, 'you know, we've been able to start putting money back into local things. It's bound to happen, it's bound to happen. But the sector, whatever the sector is, will survive this. It's survived worse"* (Staff, Organisation A) *"And with a Conservative Government, they're not prepared to fund social justice; they're not prepared to fund initiatives that make a very small difference. It's a case of if it doesn't fit in this box, it can't be done, is how I feel. It's that whole cost benefit stuff. You can only understand that on a local level if you know that provider and you know what the outcomes are, and outcomes as well. I mean the outcomes frameworks for health, for*

	everything, were talking a lot about outcomes, but there are very different understandings…what an outcome is from public health, from our NHS providers, CCG, the voluntary sector, who I think have a much better understanding because we've been doing it for a damn site longer. About what that means for people and what the difference is" (Staff, Organisation B) *"But there has been a lot of pump-priming money, mainly through Europe, but also some through the Government, to try to build capacity within the voluntary sector to be ready to work as a consortium, to bid for the contracts. It was great when it was first announced, but within the latest paper there was also the announcement that it would be payment by results. So however ready you are, if you haven't got the reserves to be able to front-load, and the voluntary sector is not going to be a prime, whether that is acting as a consortium, or whether that's acting as a big, stand-alone voluntary sector organisation."* (Trustee, Organisation A) *"I think there's just been general, there was a certain amount of annoyance probably in the sector as a whole, and certainly I'm thinking of sort of the faith sector, the whole thing about the Big Society in the first place, was 'we're already bloody doing it' kind of thing. And then you know, because there's been really nothing to back it up, and in fact, so much, you know, there's been withdrawal of money from the sector and undermining it more, then it just does become something that smacks of hypocrisy really."* (Trustee, Organisation A) *"Because they talk a lot about public service delivery, about the sector having a part to play in public service delivery, but at the scale that they're talking, the sector will never be in it. We'll be priced out of the market and we are not big enough to compete"* (Staff, Organisation B) *"[Social value] was presented by the Coalition Government as a way to benefit the third sector, but I don't think it will benefit the third sector. I think procurement processes are very much angled towards large scale organisations, and that private sector organisations very used to procurement processes, are very good at winning contracts really, but not so good at delivery, as we say with G4S at the Olympics…It's definitely a political agenda, isn't it, about trying to privatise, and trying to introduce*

	competitive processes" (Staff, Organisation C) *"I think the sector is generally, is very, very much trusted by the public, more so than the public sector and more so than the private sector, which is why I think the opportunity for the sector is at the moment. Because people don't trust the private sector, quite rightly in some instances for me, because as I say, it wasn't the public sector that got them into this mess. I think they're very dissatisfied with the public sector"* (Staff, Scoping interview 5)

The examples in the table above illustrate the numerous dimensions of critiques of the state which were discussed by organisational actors within this study. Actors' criticisms range from questioning particular projects or policies, such as 'The Big Society', or 'The Social Value Act', to challenging the overall approach of national government, and its ability to comprehend the 'nature' or 'place' of the voluntary sector. Some extracts go further, to suggest something more sinister is taking place at a national government level, as highlighted in the following extract from Organisation A:

> *"I suspect, with my conspiratorial hat on, like, what they're trying to create is a field where nobody knows what anything is so almost like the state can disappear because it can be transformed into one of these other organisations. I mean, because, just typically when you get a conservative government or a conservative-led government, you know, I don't think there's any secret with the fact that they don't like the idea of a big state, they want a smaller, shrinking state. Now, if you can even muddy that in terms of what the state is, then you're onto sort if an easier ride, if all these organisations suddenly, no one knows what they are."* (Trustee, Organisation A)

Within this quote, the suggestion that the government is seeking to drastically unpick the state, and create confusion in terms of where the public sector ends and the voluntary sector begins, embeds both the importance of the division between the sectors, whilst simultaneously questioning the moral standing of the state.

6.3.3 Identity work: rejecting the identity cues of the market rationality logic

The final discursive tactic explored within this chapter is the way in which actors openly engage in identity work which actively distances the sector from the identity cues associated with messages of market rationality, and in particular the sector's role in the service delivery market. This discursive tactic suggests that actors are directly engaging with a dominant logic's identity cues, which exist at the national level, but directly undermine the strength of association between the voluntary sector and its role in the delivery of services.

Table 6.3.3 (below) sets out a series of examples from actor accounts wherein actors appear to be distancing the voluntary sector from aspects of societal messages, and rejecting notions of both professionalising voluntary sector organisations, and aligning voluntary action too closely with public services delivery. From their appearance in a number of actor accounts in the table below, it seems that such identity cues are understood, and therefore could be considered an aspect of the cultural 'toolkit' to which actors have access.

TABLE 6.3.3: Dimensions of identity work wherein actors are distancing from market rationality logic

Dimension of identity work	Data
Distancing from market rationality messages	*If the public body is buying a service, then what counts is the service-user's satisfaction with that, and unless there's some added value that a voluntary organisation can bring then in truth it doesn't matter who delivers public services...now I think all of that is a different thing to growing social capital, creating community, creating a society where there is less need for those public services" (Staff, Organisation A)* *"The underlying point about voluntary action is it's about community ownership of their own destiny. Being able to say, 'this is about us', or as the disabled community would say, 'nothing about us without us, we've got to be involved'. And that's the essence of voluntary action. The service delivery is, you know, John Lewis could probably deliver home care, they'd probably be very good at it once they'd sort of learnt a bit. But that's not really the issue.*

	The issue is what sort of community are those services going to be delivered to? What is the life of the community that creates a place for everybody? Because if we're just talking about service delivery, then we could be the chamber of commerce, there's no distinction" (Staff, Organisation A) *"The nature of [commissioning] is inimical to innovation, which is the thing that the sector does well. Because it's often a model where commissioners say, 'we want this. Can you do it?' not, 'What's needed? Who can best do it?' I think also that people came together, had an idea, then tried to find people to fund it. Because the voluntary sector's life blood in the end is people coming together because they want to do something..."* (Scoping interview 9) *"The majority of the sector are micro organisations, micro-organisations do not deliver [public] services. They work in communities, they are volunteer-led, they run on small amounts of money and deliver very valuable activities in the community, and with the community, and for the community. So they are not going to professionalise".* (Staff, Organisation C)

Within the extracts above (Table 6.3.3) actors are again clearly drawing on the identity of the voluntary sector in moral or normative terms, in a way which is consistent with the analysis explored above (see Section 6.3.1). Actors discuss the nature and purpose of voluntary action, focusing on the 'essence' of voluntary action, and how organisations meet 'real' need in the long term. What these extracts also demonstrate is how actors hold these normative characteristics and actions in direct contrast with what they consider to be less favourable identity cues, such as associating the voluntary sector with the delivery of public services. In other words, actors are rejecting the identity characteristics associated with the market rationality logic[14], whilst retaining their association with the enduring voluntary action logic.

This discursive approach, which involves comparing and separating-out two identity cues aligned with contradictory logics, but which are both associated with the voluntary sector, effectively elevates the more favourable identity cue (normative

[14] The identity characteristics of logics are discussed in detail in Chapter 4

identity) at the expense of the comparator. It is clear from the extracts above that the actors, within their narratives, place more value in what they consider to be the 'real' work of organisations within the voluntary sector, such as 'delivering valuable activities to communities', or 'growing social capital'. The actors suggest that characteristics or policy approaches of the state, or statutory organisations, are less valuable, (for example, 'paternalistic approach', 'John Lewis could probably deliver home care'), and therefore elevate what they describe as features or characteristics of enduring voluntary action. For example, this actor from Organisation A acknowledges that voluntary sector organisations will be involved in the delivery of public services, but diminishes the importance of this work, and importantly diminishes the risk associated with it:

> *"So yes there'll be contracts, and there'll be public services to be delivered, and yes there will be organisations that change to deliver that, maybe. But I think you'll still always have that kind of other layer of organisations that meet real, local need, and do those things they want to do. I think they will always be there. So I don't worry too much that somehow we're all going to turn into, I don't think it's going to become corporate-land in the next 5, 10, 20 years, I just don't think that's going to happen"* (Staff, Organisation A).

Actors may be 'artful' in the way in which they draw upon different institutional logics, and associated identity cues, in order to enable them to construct identities (Freidland and Alford, 1991; Kodieh and Greenwood, 2014; Westenholz, 2006), but this study extends our understanding of the details of actor techniques, through demonstrating how the identity work undertaken by actors can serve as forms of institutional work. Within such examples, actors are not only embracing one set of ideas, but using discursive tactics concurrently to reject or distance the sector from other identity cues which are 'served-up' by a more powerful actor (i.e. the state) within the institutional environment (Glynn, 2008). This active, 'agentic' presentation of micro-level, relatively powerless actors contributes to our understanding of the concept of embedded agency, through demonstrating how actors use institutional complexity created by multiple logics, in order to embed an identity through both aligning with, and distancing from, different identity cues which are present at the societal level.

The extracts in Table 6.3.3 also present actors engaging with multiple identity cues, aligned with different logics. The way in which actors make sense of these multiple cues, all of which are present at the societal level (see Table 6.2) demonstrates that actors do not simply align with an identity cue being encouraged by a more powerful change agent, i.e. the state, in order to avoid being excluded and missing opportunities (Kennedy, 2008). Exploration of this data instead demonstrates how actors are elevating an alternative identity to that being prioritised by the state. For example, documents of the current Coalition propose the need to:

> *"Ensure that CSOs have a greater role and more opportunities in delivering public services by opening up new markets in accordance with wider public service reform measures and reforming the commissioning environment in existing markets"* (HM Government, 2010: 3)

Actors within this study instead distance from an identity closely aligned with service delivery, suggesting that:

> *"The voluntary sector isn't just a [service] provider, you know, that actually the voluntary sector is a campaigner and an advocate for communities, and has a lot of knowledge about the needs of local communities"*
>
> (Staff, Scoping interview 1)

This therefore develops extant discussions about the way organisational actors respond to multiple logics. In suggesting that actors are 'artful' and engage in proactive identity work, we can better understand the significance of this work, and the role this can play at the micro level. It demonstrates that actors, even those considered to be less powerful, can be active in establishing their institutional identity. This develops extant understanding about the ways in which less powerful actors can use logics as resources to at once remain coherent and thus legitimate (i.e. aligning with the enduring voluntary action logic, which is well understood) whilst resisting and challenging a dominant logic of a given era, surfacing the contradictions between the two sets of identity cues in order to secure their position.

The strength of the identity cues surfaced within this study, and the distinctions drawn between identity cues associated with the 'enduring voluntary action' characteristics

and those associated with 'strong market rationality', enables actors to offer strong critique of national government, as explored in Table 6.3.23. Despite the relative power differentials between local and state actors, voluntary sector actors appear to use their identity as a point of distinction between the voluntary sector, the state and private sector service providers. Considering the aspects of the actor accounts explored above, the literature on institutional storytelling is particularly useful when reflecting on the use of language to serve particular means, as discussed here.

6.4 Conclusion

Returning to the research question posed at the start of this chapter, which asked how logics and associated identity cues are received and reworked within LIO actor accounts, this chapter has posited a number of reflections and contributions. Through demonstrating how logics and associated identity cues surfaced through the analysis of national documents are then reworked within voluntary sector actor accounts, the tangible link between ideas at a societal level, and a micro institutional level begins to be recognised.

This chapter has particularly exposed how voluntary sector actors are aligning themselves with normative or moral identity cues associated with the enduring voluntary action logic. As the summary in Table 6.2 above demonstrates, the characteristics associated with the 'enduring voluntary action' logic characteristics have been present discursively at the societal level as far back as 1978. It is the most enduring set of ideas surfaced, although less prevalent across the range of national documents in the Coalition administration which were analysed. Attempts by the current Coalition administration to shift the dominant logic, and associated identity cues (see table 6.2) in order to emphasise characteristics of a strong market rationality logic (relating to the sector's role in the service delivery market alongside other providers) have not led to LIO actors within this study aligning with these identity cues.

In demonstrating how actors have engaged in identity work to align with identity cues which emphasise their normative or moral identity, this study has surfaced a dynamic element of maintaining legitimacy, as it has traced the shifting of priorities between political eras. This study would suggest that the focus for organisations has shifted from an emphasis on the sector's political identity in previous eras (see Taylor and

Warburton, 2003) to the normative or moral identity cues within the Coalition era. This dynamic nature of identity work, and the way in which organisational actors are adept at shifting their identity priorities, demonstrates the important ways in which organisational actors actively engage with institutional logics at the societal level, and thus responds to calls for more attention on how identity evolves and changes over time (Kodeih and Greenwood, 2014). This illumination of the active work at the micro level also responds to calls for work which considers agency within voluntary sector scholarship (Acheson, 2014). Indeed, that voluntary sector actor engagement with institutional logics is not a simple response which tracks the societal priorities in order to remain 'on-side' with the more powerful actor, i.e. the state (Kennedy, 2008), is an important contribution to extant understanding. This study has illustrated how actor identity work is a pro-active judgement of national priorities and ideologies as conveyed through institutional messages, and the 'institutional fit' with other aspects of the sector's institutional identity.

It could be posited that the idea of enduring voluntary action, and associated identity cues, is so embedded, within both state documents and at the field level, that using it as a resource to resist alternative, contradictory logics, (as with market rationality for example) is something which cannot easily be challenged by those powerful actors. This chapter has also contributed a better understanding of the discursive techniques employed by voluntary sector actors in this study, highlighting examples of how actors engage in identity work which embeds normative or moral identity cues. Within this, institutional storytelling has been surfaced as an important vehicle for institutional myths (Deephouse and Suchman, 2008), and thus part of the actor's cultural repertoire harnessed within the examples of identity work discussed. This chapter also contributes to the extant literature which considers the purposes of storytelling within organisations. Although considered to be important in other aspects of organisational life (see Chen 2014 for a review) this chapter posits the idea that storytelling is, in fact, an important element within identity work, and could therefore open-up different ways of researching instances of work in organisations.

Having explored the identity work of LIOs in aligning with, and resisting the identity cues associated with institutional logics, this study will now draw together the

discussion relating to the empirical work at the societal and micro levels. The final chapter, which offers concluding discussions relating back to the three central research questions, considers what these empirical findings offer back to the study of the relationship between the voluntary sector and the state.

7. CONCLUDING DISCUSSION

This study set out to explore the relationship between the state and the voluntary sector. In particular, the central puzzle it addresses was to consider the extent of the interplay between ideas – or institutional messages – constructed and conveyed at the national level, and the ways in which actors within local infrastructure organisations rework these ideas within their narratives in order to resist or reject dominant messages, and the role-identity implications they contain, from the state.

The central puzzle identified here was borne out of a lack of studies within a voluntary sector context which considered the agency of those working and volunteering within this grouping of organisations (Acheson, 2014). This question of agency was reflected in contemporary and historical debates within literature exploring institutional theory, and this broad theoretical scholarship was used in order to build a conceptual framework, drawing on key concepts within each of the three empirical chapters around which this study is built. The conceptual framework of this study was of central importance, and indeed, a number of the contributions to knowledge made through this thesis are contributions to the extant understanding of aspects of institutional theory.

This study explored the interplay of ideas at the national and micro levels within a context of the voluntary sector as a clear object of state policy. Chapter 2 discussed the historical basis for this position, and explored the gradual shift in the role of the voluntary sector (or voluntary action) as well as the role of the statutory sector over time. This historical account, which tracked up to the Coalition administration of 2010-2015 helped to contextualise the empirical work which followed, as it explored a number of the key definitional discussions which have been a feature of ongoing debates.

As well as seeking to explore the overarching puzzle of the nature of agency at the micro level – the level of individual actors within voluntary organisations – the study responds to the lack of extant studies, within both voluntary sector and institutional scholarship which bridge the gap between exploring the societal level, and exploring the experience at the micro level (Lammers, 2011; Lawrence et al, 2011). The empirical work on which this study is built was conducted at both the societal and the micro levels in order to begin to consider how such bridging studies could be conducted effectively. Focusing on ideas, I constructed a methodology based on two kinds of data collection work: discursive analysis of national documents and qualitative interviewing to explore actor accounts. This methodology enabled me to respond to the following research questions:

> **RQ1.** What are the central ideas regarding the relationship between the state and the voluntary sector, and their respective roles, which are constructed within institutional messages over time?
> **RQ2.** What do Local Infrastructure Organisational actors suggest are the field-level implications associated with shifts in ideas regarding the role of the sector, the state and the state-sector relationship?
> **RQ3.** What rhetorical strategies do LIO actors adopt as they engage in debates over ideas about the role of the sector, the state and the state-sector relationship?

As highlighted within the Introduction to this thesis, I chose to structure this thesis in a way which was faithful to the chronology of the iterative research process, embedding the literatures and theoretical concepts within the discussions of the empirical work in Chapters 4, 5 and 6. As these chapters also contained discussion of the findings and contributions to knowledge, this chapter provides a concluding discussion, drawing together the central contributions to knowledge, the limitations of this research project and implications for future research.

7.1 The Contributions to knowledge

In order to draw together the central ways in which this thesis contributes to knowledge, each research question will be returned to in order to crystallise how each area of the research project enabled a series of contributions to be made. The first research question set the parameters of the research at the societal level:

> *RQ1.* What are the central ideas regarding the relationship between the state and the voluntary sector, and their respective roles, which are constructed within institutional messages over time?

The empirical work at the societal level involved a discursive analysis of national policy documents taking as their subject, in whole or in part, the relationship between the state and the sector. Undertaking this piece of empirical work responded to a gap within extant literature. Whilst a study by Coule and Patmore (2013) went some way to evoking the logics associated with particular eras through existing literature, little has been done to advance the empirical analysis of institutional logics evoked through national government documents. This is a problem, because without such empirical studies, we lack understanding of the interplay between societal and organisational levels (Lawrence et al, 2011).

The empirical analysis demonstrated how national documents authored by actors within government departments discursively construct and convey a series of institutional messages which align with multiple institutional logics. This was also a temporal study, surfacing logic shifts over four decades, enabling a temporal view of how ideas relating to the voluntary sector have shifted or remained, as well as gained or lost dominance between 1978 and 2012. The logics surfaced are summarised in Table 7.1.1 below.

TABLE 7.1.1: Summary of institutional logics constructed and conveyed through national documents

Characteristic of the logic	Conservative Era (1979-1997)	New Labour Era (1997-2010)	Coalition Era (2010 - present)
Role of the state	**Rolling back the state** - the state should set the framework for activity but remain at arms-length and reduce its direct delivery	**Weak state primacy** - the state has a central role **Weak market rationality** – a need to increase competitive processes through market development	**Rolling back the state** - too much state control is dangerous so Government wants to transfer power down to communities
Role of the sector	**Enduring voluntary action** - voluntary action is historical, represents a deep-rooted human impulse and organisations have qualities which are understood	**Community Empowerment** - the sector has a role to involve people in civic life, and enable voices to be heard by decision-makers **Weak Market Rationality** - the voluntary sector has a responsibility to improve its performance **Enduring Voluntary Action** - voluntary action is historical and organisations have qualities which are understood	**Community Obligations** - the sector has a role in servicing and strengthening communities **Strong Market Rationality** - voluntary sector groups should be able to behave like private sector organisations, and have access to the public services 'market' on a level playing field **Enduring Voluntary Action** - voluntary action is historical and organisations have qualities which are understood

State-Sector relationship	**Separate spheres** - the sectors should work together but allow distance and non-interference by the state into the workings of voluntary organisations	**Partnership** - the state and the voluntary sector should work together, due to shared aims and visions for communities	**Separate spheres** - the state should allow groups to operate independently of state interference. The focus becomes communities

The point which is particularly striking about this analysis is the way in which multiple logics are present during any given political era. Extant literature commonly discusses institutional logics in terms of single dominant logics, and therefore explore one logic being displaced by another (Kodeih and Greenwood, 2014; Zilber, 2011). However, the analysis of national documents conducted within this thesis points to multiple, and at times competing, institutional logics being constructed and supported concomitantly within single documents, and across the documents analysed from each political era studied. For actors within voluntary sector organisations, this can mean that messages from national government can construct seemingly contradictory identity cues. For example, the logic of 'enduring voluntary action' is constructed and conveyed when considering the role of voluntary organisations with regard to vulnerable, hard to reach groups (see for example Cabinet Office, 2002; Conservative Party, 2008) but simultaneously, messages in documents construct logics of 'market rationality' when discussing public service delivery contracts (see for example HM Government, 2010; Home Office, 2004). Surfacing this institutional complexity, and the apparent contradictions this creates, illuminates the complex institutional context within which actors are working.

This study has demonstrated that documents contain messages alluding to a sector identity premised on different logics, and do so for a particular purpose. On the one hand, documents are constructing and conveying identity cues based on the historical values of the sector, whilst also alluding to somewhat contradictory identity cues more proximate to private, profit-driven entities. This study has demonstrated how the state constructs and conveys this kind of institutional complexity (Kodeih and Greenwood, 2014), appealing to a well-established logic which may resonate with actors (Maguire and Hardy, 2006; Suddaby and Greenwood, 2005) within the voluntary sector whilst simultaneously embedding a logic which is in-line with an administration's ideology, i.e. strong market rationality as an example within the current Coalition administration (Taylor-Gooby, 2012).

This contribution to institutional literature is important, because it demonstrates how promoting institutional complexity via discursive tactics may actually be a way in which the state is attempting to shift the dominant logic of an era, whilst retaining a degree

of coherence with the target audience i.e. the voluntary sector. Surfacing this level of detail about ideas has in turn enabled a more nuanced and therefore meaningful analysis of the interplay between the societal and micro levels of analysis.

An aspect of the discursive analysis of documents which paves the way for future studies is the consideration of 'transition documents'. The analysis of these documents revealed how they performed a particular function of marking an ideational shift from one political era to the next, surfacing as they did the apparent flaws within previous eras, and looking ahead to 'better times'. Extant studies have explored the central ideas contained within such documents (for example see Alcock 2010b; Crowe et al, 2010 as examples of papers which consider aspects of the Conservative Party Green Paper). However this study is the first to consider their role in a larger political project in terms of how they create discursive space for new ideas (Hardy and Maguire, 2010), which can then play a part in the subsequent political administration's attempt to embed their political ideology. A summary of the ideational shifts proposed by these documents is outline in Table 7.1.2 below.

TABLE 7.1.2: Ideational shift within transitional documents

	Wolfenden (1978) **Labour administration transitioning to a Conservative administration**	**Deakin (1996)** **Conservative administration transitioning to the New Labour administration**	**Conservative Green Paper (2008)** **New Labour administration transitioning to a Coalition administration**
State	The state is overbearing, monolithic, excessive Promotes a rolling back of the state	The state is no longer monolithic and overbearing Promotes state primacy – voluntary sector-state partnership	Too much state involvement is dangerous and threatens civil society More power should be transferred to communities
Sector	Important but supplementary to the state; virtuous, enduring, possessing qualities - could add value to service delivery Promoting a greater involvement of voluntary organisations in service delivery	The sector has numerous enduring qualities The sector should play a greater role in civic life and consider working more with private sector organisations	The sector has qualities but has been stifled and co-opted by the previous government The sector should be able to be more autonomous, but also should be able to operate more like private entities
State – Sector Relationship	Voluntary organisations as extension of state provision – supplementary Promotes separate spheres, whereby the voluntary sector should have a greater degree of autonomy	Critiques a separate spheres relationship between the sectors Promotes partnership - a closer relationship between the state and the sector	The state has been too controlling of the voluntary sector Promotes more of a separate spheres relationship

What is particularly salient about this contribution to knowledge is what it can offer future studies into changing political ideologies and the power ideas may have in such shifts. Acknowledging and understanding more about this subtle, discursive process whereby a transition document paves the way for a shift in the dominance of particular logics could provide a point of access for other studies seeking to trace ideational, or logic, shifts over time. Exploring these 'transition documents' enabled the study to go beyond observing that a shift had taken place between political eras, and effectively pinpointed a document within which such a shift was discursively playing-out. In creating discursive spaces for new ideas such documents herald changes in the dominance of particular institutional logics, and associated ideas or messages. For example, considering the shift between the Conservative administration (1979-1997) and the New Labour administration (1997-2010) the Deakin Committee report critiques the incumbent administration's characterisation of the state as 'monolithic' and 'overbearing'. In so doing, the report effectively opens up a discursive space for a new characterisation to emerge. Into this space, the Deakin Commission Report suggests a state which should set the framework for activity, and be a central player in regeneration and renewal (Deakin, 1996), setting the foundations for the New Labour administration to both play a more active role, but also build an active partnership with voluntary sector organisations.

Acknowledging this function of transition documents offers a unique contribution to extant institutional literature, by exposing a mechanism which enables shifts in logics – or at least their dominance - in periods which are not characterised by significant upheaval. Studies which have explored institutional shifts have thus far focused upon periods characterised by 'punctuated equilibrium' (Parsons and Fidler, 2005; Romanelli and Tushman, 1994) which denotes times of significant upheaval. If we understand the role that transitional documents play, this offers an alternative approach to studying periods characterised by more subtle shifts between dominant logics at the level of state policy.

This insight into logic shifts over time was possible only because this aspect of the empirical work considered historical and contemporary documents spanning four political eras. This approach enabled the study to take a temporal view of logics, and hold eras in direct comparison, noting how language shifted, drawing different ideas to the fore whilst pushing others into the background. This aspect of the empirical work also responds to a gap in studies of policy ideas over time, as a greater emphasis within extant literature is placed on snapshot, or international comparator studies, rather than studies tracing ideational change over extended time periods (Hall, 1993).

Thus the analysis of national documents enabled a series of significant contributions to be made. It also laid the foundations for the subsequent analysis of LIO actor accounts, in that it provided a body of empirical work with which the micro-level analysis could be considered. The conceptual framework provided a meaningful way in which to consider the multi-level analysis. The first aspect of the empirical work at the organisational level focused upon how actors were discussing shifts at the field-level. The focus on language and ideas enabled the reference back to the ideas at the national level. The contributions made in response to the second research question will now be discussed. The second research question posed at the study's outset framed this field-level focus:

> *RQ2.* What do Local Infrastructure Organisational actors suggest are the field-level implications associated with shifts in ideas regarding the role of the sector, the state and the state-sector relationship?

The actor accounts of field level changes offered a particularly powerful illustration of how actors from within LIOs narrate their experience of the fall-out from the shift in dominant institutional logics. The power of such accounts is heightened when considering that they detail what is happening within a *mature* organisational field. Extant literature has ensured that we know a great deal about the institutional processes playing-out within new, emerging organisational fields (see for example Braithwaite and Drahos, 2000; Maguire et al, 2004), and commonly recognise mature fields to represent stability (Hinings et al, 2004) unless experiencing brief periods of

upheaval, often characterised as moments of 'punctuated equilibrium' (Newman, 2000). Yet actors from LIOs within this study were describing features of the field-level context which represented changes and adaptations which could be traced back to the shifts at the national level - shifts that had been traced in the rhetoric of national documents as explored in Chapter 4. Noting that a well-established field could experience a weakening of constraints is an important contribution to extant work, because it offers a way of understanding changes to mature fields which are more subtle, or more nuanced than those often considered. This development can help us to better understand periods of ideational change and how these changes can play out within well-established fields of organisational activity.

Within the analytical process, it became clear that what precisely actors were describing when they considered changes at the field level were weakened field constraints, in a number of guises. Field constraints are the rules, or normative practices, which guide field level behaviour (Philips et al, 2000), and this analysis pointed to three distinct categories of constraints that were changing, or weakening. Grouping these together within categories supported a better understanding of how actors within this mature field were actually experiencing, and articulating, change.

This led to the development of the following typology, which characterises the shifts that were being explained. See Table 7.1.3 below:

TABLE 7.1.3: Typology of weakened field constraints

WEAKENED FIELD CONSTRAINT	DESCRIPTION	EXAMPLE
Changing field structures	The loss of acknowledged structures and rules of engagement.	"There were certain outlets and arenas in which you could speak...and we were, if you like, dialogue partners... When they've gone, it becomes much more difficult" (Trustee, Organisation A)
Disruption at the field level	Upheaval and instability in the public sector	"The cuts have had a massive impact, because whole departments have just disappeared basically." (Staff, Organisation C)
New field structures	New statutory sector structures being created	"It's no different to any other area, a bit of a nightmare I think. It's, it's particularly difficult because the CCG is going to cover two local authority areas" (Staff, Organisation B)

Not only did the production of this typology help us to better understand the accounts of actors within this individual study, but also how societal level shifts (such as those analysed in Chapter 4), can be experienced at the field level. For example, recognising that the shrinking of state infrastructure, as a practice associated with the strong market rationality logic, is experienced in ways such as a loss of acknowledged partnership or communication structures at the field level, makes the link between the societal and the field levels tangible and thus able to be acknowledged and discussed. It also illuminates the implications of such logic shifts, and enables us to discuss them in relation to one another.

Although the typology of weakened field constraints within this context may be particular to this organisational field, a particularly poignant implication of this contribution is what it can tell us about how we can empirically explore the interplay of ideas between the national and the local levels. In paying attention to the accounts of actors, this study is able to consider – through the lived experience of actors - the implications of ideas which both signal, and construct, a shift in institutional logics. This attention to the lived experience of actors at the field level also responds to acknowledged gaps in extant literature, which commonly prioritises exploring macro level processes at the expense of developing a better understanding of actor experiences (see for example Palmer et al, 2008; Lawrence et al, 2011).

This approach, which prioritised attending to the lived experience of actors, meant that this study could go on to consider the field level responses to weakened constraints that actors were discursively constructing. Two particular responses, or field-level practices, were illuminated; developing alternative communication channels; and inter-organisational collaborations. Both these practices featured within accounts as means of navigating the shifting field context. The latter is of particular interest in terms of developing academic understanding about how actors within their accounts assign value to this particular field level practice in contexts characterised by weakened field constraints.

Inter-organisational collaborations have been discussed in terms of their value in newly-emerging fields (Phillips et al, 2000) but this study extends this understanding, by considering the value assigned by actors in well-established organisational fields. Understanding such collaborations - described by actors as ways of working together to survive the local-level disruption generated by the austerity agenda (Lowndes and Squires, 2011) – as particularly significant field level responses to weakened field constraints is an important finding in terms of understanding how organisations are traversing the shifting field-level context. It also has implications for understanding how collaborations might play a part in other contexts characterised by institutional complexity.

Chapter 5 thus explored the discursive accounts in terms of how actors narrated the shifting institutional context, and this set the scene for the final empirical chapter which sought to respond to the third and final research question:

> *RQ3.* What rhetorical strategies do LIO actors adopt as they engage in debates over ideas about the role of the sector, the state and the state-sector relationship?

From the discursive analysis of the LIO accounts emerged prominent discursive features, most notably in the form of identity work. These aspects of the accounts were even more striking because of the relative power differentials between the LIO staff and volunteers taking part in this study, and the power associated with the national documents, as they are authored by individuals within state-departments, national committees and political parties. A focus on discursive practices enabled a consideration of agency at the micro level, which had been a central puzzle at the outset of this study. This was achieved by drawing on the central concept of 'institutional work' in order to understand the discursive identity work in which actors engaged within their narratives.

The analysis considered the ways in which LIO actors exploit the multiple logics which are constructed and conveyed within national documents, using the space created by this multiplicity to engage in identity work, using characteristics of institutional logics as resources. This is particularly important when set within the recent calls for considering how voluntary sector actors translate dominant narratives (see Acheson, 2014). This study focused on logics and identity work as one plausible way of empirically engaging with and responding to this call.

The detailed attention to the language used in actor accounts enabled this study to explore in detail how actors appropriated and at times reworked characteristics of the logics within their active identity work. The empirical analysis explored how actors used multiple and conflicting logics to their advantage, able to both align with favourable logics, whilst concomitantly distancing from logics which were less favourable, such as the identity cues associated with market rationality. The

discussion surrounding the analysis considered how this work effectively confirmed their own identity position, which meant that they retained legitimacy via aligning with cues associated with 'enduring voluntary action' (focusing on features such as sector values, ethos and guiding principles) whilst simultaneously distancing from unfavourable identity cues such as those associated with market rationality.

As mentioned above, it was the attention to the detail of the language used by actors within their accounts which enabled the study to recognise how actors can be artful in their use of logics as critical resources. This attention to linguistic detail enabled the discursive devices to be examined, in order to really pay attention to how actors were going about this kind of discursive work. In particular, the study found that actors prioritised identity cues associated with the normative or moral identity of the voluntary sector and that they enacted this within their accounts. One way in which actors did this was to engage in institutional field level storytelling relating to the sector's normative identity. Actors also engaged in comparisons between the voluntary sector and the state and market, through which they discursively embedded the permanence of the voluntary sector as compared with the impermanence of statutory approaches associated with particular political administrations. These devices worked to prioritise identity cues relating to the 'enduring voluntary action' logic.

A central contribution made by this study is premised on the finding that the devices explored in actor accounts do not align with dominant logic-shifts at the national level. Chapter 4 established that the national documents of the present Coalition administration increasingly prioritise the 'market rationality' logic, and that logics associated with partnership and community involvement had receded (although were still referenced to a lesser degree in literature relating to the Big Society). Despite this shift at the national level, this study demonstrates how relatively powerless actors can discursively resist adopting the identity cues promoted by the state, as a more powerful actor. In making this contribution, this study develops extant work which suggests that powerless actors tend to align with cues promoted by powerful actors

(Glynn, 2008) particularly in terms of not wanting to be excluded or missing opportunities which might otherwise be open to them (Kennedy, 2008). This contribution to existing institutional literature is important because it illuminates the need to empirically explore other institutional contexts, particularly those contexts which support the assumption of a lack of power or agency. Paying attention to ideas embedded within and conveyed through language can illuminate the ways in which power is being challenged or resisted in less visible or overt ways.

Exploring this process of actor-resistance is an important observation, but there is another frame through which to observe agency at the micro level. As highlighted in Chapter 6, this study builds on work by Taylor and Warburton (2003) which observes that voluntary sector actors during the New Labour era (1997-2010) prioritised their political legitimacy over and above their normative or moral legitimacy. This study develops this understanding, by showing how actors are prioritising moral or normative legitimacy in the current era of the Coalition administration. For example, actors discuss their priorities in terms of being the "glue which holds communities together" which is contrasted with the idea that "it doesn't matter who delivers public services" (Organisation A). Through the discursive technique of promoting one set of ideas about the role-identity of the sector, and reducing emphasis on another set of ideas (around the sector's role in service delivery), voluntary sector actors, such as this actor from Organisation A, are rejecting and reworking the shift observed at the societal level. In so doing, actors are challenging the state's priorities regarding the identity of the voluntary sector.

Aside from making the observation that priorities have changed for some voluntary sector actors (shifting from a political to normative legitimacy focus) this observation offers more insight into identity work. This particular contribution is of greater significance because it also signals the dynamic processes involved, suggesting that this kind of identity work is not static, but can shift depending on factors such as the priorities being conveyed at the societal level. This is an important contribution, particularly when considered against the backdrop of the societal level shifts in

institutional logics. It shows how actors at the local level are able to engage with logics, but also that this process shifts and can be recast in different eras. Where actors may have been happier to align with the political legitimacy prioritised within the New Labour era, actors within this study have centred on their normative identity in order to resist the increasingly dominant logic of market rationality.

We can therefore observe the overarching dynamic nature of identity work within the voluntary sector field. Far from being passive recipients of institutional order, or actors who simply instantiate institutional logics, this study builds on a small but growing number of studies which explore embedded agency (see for example Creed et al, 2010; Gawer and Phillips, 2013) and recognise the active role of actors as they engage proactively with the institutional context, and in particular, institutional logics. Acknowledging and illuminating the active way in which actors within LIOs engage with institutional logics via their identity work has also demonstrated how relative power differentials do not necessarily impede an actor's discursive ability to distance themselves from the identity cues promoted by the incumbent political administration.

Pursuing this study, therefore, a number of contributions to knowledge have been made. Despite this, as with any study on this scale, a number of limitations exist, and these will be outlined below. The section which follows will also summarise where aspects of this research could now be taken in subsequent research projects, in order to develop extant understanding of the relationship between the voluntary sector and the state, but also understandings and applications of key concepts from within institutional theory.

7.2 Limitations of this study and future research possibilities

This research project was necessarily bounded, and because of this, there were limitations which need to be summarised. An important aspect of the study, which was explored in the methodology chapter, was the choice of organisations through which I accessed the individual actors that I would go on to interview. The choice of local infrastructure organisations was important within this study (for a full explanation, see Methodology) as was identifying organisations working at the local

level. However, it must be acknowledged that this choice determined the nature of the narratives the study would construct. Actors within different organisational settings would have had different stories to tell, whether from larger organisations, smaller organisations, organisations further immersed in public service contracts or organisations which had totally rejected this agenda. The choices I made therefore impacted on the kind of data I had access to.

One way in which this study could have been developed is by choosing two different kinds of organisations, which operate within different institutional circumstances (Lok, 2010) which would have enabled comparisons to be drawn. If, for example, the study had explored the narratives of actors fully engaged in public service delivery, the narratives around organisational and sector identity may have been different, leading me to make slightly different interpretations about the way that identity priorities are changing within the sector (from prioritising political legitimacy in the New Labour era, to prioritising moral or normative legitimacy in the present Coalition era). However, the approach I chose to take within this study was the most appropriate way to advance understanding of the particular case of LIO actors, which, as explained in the Methodology, play a particularly significant role at the interface between the state and the wider, local voluntary sector (Macmillan, 2011).

It is also important to acknowledge the limitations imposed by the choice of documents analysed. The limitations of this study meant that it was necessary to restrict the number of documents, but this, as well as document selection, may have impacted on the data and thus the analysis and conclusions drawn. It would be interesting to consider a different range of documents in a subsequent study and consider how the data and analysis differ.

A number of limitations can be traced back to the snap-shot nature of the data collection at the micro level. The societal level analysis was enriched by its longitudinal nature. Having access to documents from previous eras enabled the study to take a longer-term view of ideational change, and thus observe how logics shifted, or

remained the same, over several political eras. Mirroring this at the micro, organisational level would have provided a richer data set, and enabled the study to consider how ideas shifted at this level across different political eras. However, the timescale of a PhD rendered such longitudinal work impossible, and the cross sectional approach adopted still enabled an in-depth exploration of how actors work with ideas and role-identity cues conveyed through institutional messages. Nevertheless, this is an area which would benefit from subsequent study, particularly with a general election in 2015.

A further methodological limitation was that there was not the scope within this study to seek interviews with those state-actors who played a role in the creation of the societal level documents. The puzzle regarding how ideas enter policy, and the process by which actors are involved in the debates and decision-making processes is an important aspect of the flow of ideas, and is the focus of much extant debate around ideas (see for example Beland, 2005; Campbell, 2002; Schmidt, 2009). As it does occupy considerable debate, this study took the under-explored aspect of the flow of ideas - from societal documents to individual organisational actors - as its focus. However, this would have made an interesting addition, or indeed would make for a useful subsequent study.

Similarly, a subsequent study which would be of particular interest would be a study into the perceptions that actors within state structures (such as Clinical Commissioning Groups) have of the voluntary sector and its role. Although this thesis has explored ideas within national policy documents, it would be fascinating to explore the ideas that individual actors within statutory bodies have of the state-sector relationship, and the sector's role. Although beyond the scope of this thesis, it would make for an interesting follow-on study.

7.3 Concluding Remarks

This in-depth, qualitative study exploring the relationship between the voluntary sector and the state has taken the more common academic pursuit - exploring the

state's approach to the voluntary sector in the context of national documents and considering what the implications could be for the sector – and instead explored the interplay of the ideas which populate the organisational field. This has built a more nuanced and detailed understanding of how key ideas have traversed a number of political eras, but also how those individual actors that work and volunteer within LIOs actually engage with and rework these ideas within their own narratives. The two-fold discursive methodology enabled the interactions to be surfaced and explored, and importantly this also enabled an aspect of the agency of LIO actors to be considered.

This study has also surfaced the importance of language-based approaches to social research. It is by acknowledging that ideas and language 'matter', and by engaging language-based methods in our research endeavours, that the power of ideas can be understood more fully in all aspects of the social world.

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APPENDIX 1: POLICY TIMELINE

- **1978: Wolfenden Committee**
- 1986 – Developing Local Voluntary Action
  Hatch, S. (1986) *Developing local voluntary action*, Occasional Paper 86/6, London: Policy Studies Institute.
- **1989 - Charities: A Framework for the Future**
- **1990 – Efficiency Scrutiny of Government Funding**
- **1996: Deakin Commission**
- 1997: Building the Future Together (Labour Party)
- **2002: Cross Cutting Review (HM Treasury)**
- 2003: Building Civic Renewal: Gov support for community capacity building (Home Office)
- 2004: Firm Foundations: the Gov support for community capacity building (Home Office)
- 2005: Funding and Procurement: Compact Code of Good Practice (Home Office)
- **2006: Partnership in Public Services: an action plan for third sector involvement (Cab Off)**
- 2007: The Future Role of the Third Sector in Social and Economic Regeneration (Cab Office)
- **2007: Third Sector Strategy and Local Government (CLG)**
- **2008: Conservative Green Paper, "A Stronger Society: Voluntary Action in the 21st Century"**
- **2010 - Renewed Compact Agreement**
- Giving Green Paper (Cabinet Office) and Building the Big Society (Cabinet Office)
- **2011 (July) Open Public Services White Paper (Cab Off)**
- **2012 (March) Open Public Services (Progress Update) (executive summary) (Cab Off)**

APPENDIX 2: EXTRACT FROM DISCURSIVE ANALYSIS NARRATIVE

2002

By 2002, the Labour administration was in its fifth year in Government, and the discourse of *"Positive Partnership"* between the State and the Voluntary Sector was firmly taking root.

The Cross Cutting Review (2002) surfaces this discourse, suggesting that good quality public services are crucial to civic life, and that the Voluntary Sector should be a partner with Government to achieve this goal, and enable society to reach its full potential. Within the opening paragraph of the Foreword to the document, the document states that the Government needs the Voluntary Sector to "reform public services" and support the "reinvigoration of civic life" (p3). Immediately the scene is set for the positive partnership. By the third paragraph, this new partnership is assumed to already be in existence, as it suggests that "This partnership *is* about fresh ways of thinking", (p3) (italics added).

The tone of the Foreword is used to frame the document as a whole, and it is urgent in its rallying call to the sector. It states the "our aim *must* be" [italics added], highlighting an urgent imperative for action. The inclusion of the phrase "we're all in this together" supports this urgent tone, suggesting once again at the collective, partnership approach needed.

As well as making overt references to the importance of the partnership between the State and the Voluntary Sector, The Cross Cutting Review (2002) uses linguistic devices to bring the sectors closer together. For example, the document refers to "our shared objectives" (p3), and "our joint vision" (p3), using the possessive determiner "our" to bring the sectors closer together, so they share the responsibility.

The principles of coproduction underpin the Labour administration's approach to the voluntary sector's role in public service delivery within the Cross Cutting Review (2002). The document suggests that the Government and the Voluntary Sector share a vision and aims for society, and that the two sectors should therefore work together to achieve better outcomes for society (p5).

2006

The *"Positive Partnership"* discourse remains firmly rooted as we move towards the middle of the decade. In 2006, the Government produced 'Partnership in Public Services: An Action Plan for third sector involvement'. The purpose of this document was to set out a plan for developing the partnership between the sectors for the delivery of public services. The fact that there is a document dedicated to this aim speaks volumes for where the relationship is located at this point.

Within this document, the discourse of *"the nurturing state"* has surfaced. The emphasis at this point is on how the state needs to change in order to become a better partner, and more nurturing of voluntary sector involvement (ii: Foreword). The emphasis has shifted slightly from a more simple sense of 'we're all in this together', as espoused by the Cross Cutting Review (2002), to a partnership whereby the state regains the powerful role of nurturer of the sector, and actor that provides the context. For example, the document refers to the need "to continue to improve the way it engages with the sector" (p3); "improving the day-to-day experience of third sector organisations" (3); draw together "a range of opportunities for third sector delivery"(5). Within these examples, the state is the actor and the sector is the recipient. It is a subtle shift, but one which does locate the power with the state.

Within the 'Partnership in Public Services' document, the message is very much about the responsibility of the state to create the right context for the voluntary sector to achieve its full potential in its involvement in public services.

An important aspect of the "nurturing state" discourse is the idea of the state supporting the development of capacity within the voluntary sector, in order to make the sector better able to meet the requirements of service delivery contracts, and fit into the commissioning process which surrounds such contracts. Sections of the report are dedicated to "Supporting Capacity" (p5), enabling the sector to play a greater role in service delivery, and "releasing the potential of the sector" (p12). This could easily be considered a coercive device, couched in terms of nurturing and support. It is, essentially, considering how the state can best achieve its aims through greater involvement of the voluntary sector.

APPENDIX 3:

CRESR ETHICS APPROVAL: Proforma for Post-Graduate Student Projects

While it is not possible to provide definitive guidelines, scrutiny of these questions will help you decide whether your research proposal requires full ethical review by the Faculty Research Ethics Committee (FREC).

This review should be completed by the student or the supervisor. In all cases it should be countersigned by the supervisor and kept as a record that ethical scrutiny has occurred and that a full ethics application is deemed unnecessary by the supervisor. The final responsibility for ensuring that ethical research practices are followed rests with the supervisor for student research.

Name of Student	*Ellen Bennett*	
Title of Research Proposal	The Power of Ideas: The relationship between the voluntary sector and state in policy and practice	
Name of Supervisor	*Peter Wells, Tracey Chadwick-Coule*	
	Yes/No	*Plans to deal with the ethical issues raised*
Does the research involve the NHS or Social Care? *If yes, separate procedures **must** be followed.*	~~*Yes*~~*/No*	
Does the study involve the discussion of sensitive topics likely to cause embarrassment?	~~*Yes*~~*/No*	
Does the study involve vulnerable participants who are unable to give informed consent?	~~*Yes*~~*/No* ~~*Yes*~~*/No*	
Will the study require the co-operation of a gatekeeper for access to research participants?	~~*Yes*~~*/No*	
If the project includes fieldwork, are there procedures for obtaining informed consent and protecting the interests of respondents?	*Yes/*~~*No*~~	Consent forms will be drafted detailing the right for participants to withhold information and to withdraw at any point up to 2 weeks following the data collection

		(i.e. two weeks following the interview date). The participant will be advised of this timescale both verbally and on the research information sheet. All confidentiality measures will also be explained in order to reassure participants. Written consent will be sought from all participants prior to their engagement with the research.
Will systems be in place to safeguard the researcher undertaking fieldwork?	*Yes/~~No~~*	Such protection will be minimal as the risks encountered on the fieldwork are unlikely to be beyond those encountered in normal life. Interviews will take place in the offices of organisations and local authority offices. I will adhere to CRESR's health and safety procedures.
Will it be necessary for participants to take part in the study without their knowledge and consent having been given?	*~~Yes~~/No*	
Are systems in place which store data and guarantee its protection?	*Yes/~~No~~*	Data storage and destruction will be carried out in accordance with the requirements of data protection legislation. Files containing the personal information of research participants will be password protected and anonymised. The researcher may also make use of CRESR's secure J drive and password protect entire personal drives in order to guarantee data

		protection. Paper data will be kept under lock and key.
Is there a risk that the study could result in psychological stress or anxiety or cause harm or negative consequences beyond the risks encountered in normal life?	~~*Yes*~~*/No*	
Are financial inducements (other than reasonable expenses and compensation for time) offered to participants?	~~*Yes*~~*/No*	
Are there any conflicts of interest in undertaking the research? (E.g. already undertaking a consultancy role in the organisation being researched)	~~*Yes*~~*/No*	

Signed by student E Barrett ..... *Date: 02.04.2011.*

Signed by supervisor ..... *Date:* .....

Approved by CRESR Ethics procedure ..... *Date:* .....

Approved by CRESR Director/Deputy ..... *Date:* .....

APPENDIX 4: RESEARCH OVERVIEW

PhD Project Brief

I am a PhD student at Sheffield Hallam University, based within the Centre for Regional, Economic and Social Research. I want to work with a small number of organisations in order to gain some insight into their experience of the current, and previous, policy environments within which they operate. The working title of my research is:

"*The power of ideas: state-voluntary sector relationship through policy and practice*"

My PhD research is exploring the relationship between the state and the voluntary sector, specifically within the context of the public service delivery policy agenda. In particular my research is considering the following:

- How the Government's approach to the voluntary sector and its involvement in public service delivery has changed over time
- How the public service delivery policy agenda is impacting upon voluntary organisations, and how voluntary organisations are responding
- The relationship between voluntary organisations and state organisations, and how this relationship is affected by the state's policy approach

Having explored Government policy relating to the sector over the past three decades, I have become more aware of how the ideas contained within Government policy changes over time, and how this reflects a changing stance towards the sector as different Government administrations come into power. I'm interested in the impact at the local level of the ideas contained within policy, and whether particular policy ideas have an impact at the local level, in terms of how an organisation operates and behaves.

The local level

Having explored the policy context in some detail, I now want to discuss the relationships at a local level. I'm interested in how the relationship is being characterised, how organisations perceive the state, and how they perceive the state's approach to the sector.

What will happen to the information gathered through this research?

The results of this research will, in the first instance, appear within my thesis, which will be available in the institute library. The longer term aim would be that aspects of this study would be included within academic publications.

Ethical Considerations

I will provide a consent form prior to all interviews which highlights some of the issues relating to ethical considerations of this research. In summary, I will ensure anonymity for both organisations and individuals. All participants will be able to withdraw from the research and transcripts of all interviews can be provided prior to analysis if requested.

Please don't hesitate to get in touch if you would be happy to discuss this further:

Ellen Bennett **telephone**: 07742 968436 **email:** Ellen.K.Hawkins@student.shu.ac.uk

APPENDIX 5: SAMPLE LETTER TO POTENTIAL PARTICIPANTS FOR SCOPING INTERVIEWS

25th July 2011

Dear ,

I am writing to you in order to ask you whether you would consider taking part in a short interview, which will form part of my PhD research. I am undertaking my PhD at Sheffield Hallam University, within the Centre for Regional, Economic and Social Research. I am supervised by Tracey Chadwick-Coule and Peter Wells.

In my research, I am exploring the relationship between voluntary organisations and the state. I am particularly interested in the service delivery agenda, and how the current climate is impacting upon relationships. I am focusing my research on organisations within the North West. The issues that I would like to discuss within this research include the following:

- the relationship between the voluntary sector and the statutory sector
- Issues around organisational identity and independence and the impact of public service delivery

I am keen to conduct a short series of interviews in order to help me to understand some of the key issues, and major concerns, across the sector at the current time. This will help to inform future research activities for my PhD.

Infrastructure, or Support and Devlopment Organisations, are my focus, as I feel that these organisations have an insight into the issues impacting the sector at the local level.

If you would be happy to take part in one of these short interviews, it should not take longer than 1 hour. Your involvement would really help to shape the nature of subsequent research. In return, I would be happy to share the culmination of this initial work through providing a summary of my findings across the interviews, which may be useful to your organisation in thinking about this agenda.

I would be happy to provide you with any additional information, in order to help you to make a decision (such as outline questions, a more detailed research summary etc). If you think it would be useful to have an initial chat about your potential involvement, please don't hesitate to contact me on [number] or email me on ellen.k.hawkins@student.shu.ac.uk. I would be grateful if you could let me know whether you would like more information, or indeed whether you are happy to participate, by Friday 12th August as I am hoping to conduct these interviews in August and September.

Yours sincerely

APPENDIX 6: INTERVIEW GUIDE

I have prepared this interview guide in order to provide you with an introduction to the issues I'd like to discuss. These issues are designed to guide the interview, but I would hope that interviews move on to cover topics which are specific to your work and interests. If you'd like some further clarification on any of the issues outlined prior to the interview, please don't hesitate to get in touch using the details at the bottom of this page.

The questions I will be asking you centre on the following broad themes:

- Your role within the organisation, and the history of your involvement with the organisation and the voluntary sector in general
- The organisation's role and activities in pursuit of this role
- The organisation's relationship with the local statutory sector, historically /currently
- The organisation's approach and response to the public service delivery agenda

Your role within the organisation

I'm interested in exploring how and why you became involved with this organisation. I'd like to discuss your background within or outside of the voluntary sector. It would be useful to find out a bit about your current role within the organisation, and what your particular areas of interest are.

The organisation

Although I understand the broad work of your organisation, I know that the position and role of organisations can be complex, with their own unique histories. I'd like to find out more about how this organisation positions itself and why; what are the core functions of the organisation, and the extent to which this role has changed, or remained the same over time, and what might have been the motivation behind this.

The organisation's relationship with the state

I'd like to spend a bit of time exploring the organisation's relationship with local statutory organisations, such as the Local Authority, both in the present day and at key points in the past. I'm interested in what has affected this relationship, considering issues from within the organisation such as personnel and organisational activities, and issues from outside the organisation such as state policy direction.

Public service delivery

The overarching context for my research is the way in which voluntary sector organisations are involved in various ways in the delivery of statutory services. I'm

interested in this organisation's specific choices within this context; what decisions were made about this organisation's stand-point, what activities have been pursued and have there been any problems to overcome? I'd like to discuss how the organisation positioned itself and why.

Ellen Bennett t: 07742 968436 email: ellenkbennett@yahoo.co.uk

APPENDIX 7: CONSENT FORM

A study into the relationship between the voluntary sector and the state

Interview Consent Form

Please confirm your agreement to participate by circling your responses to the following questions.

Have you had an opportunity to discuss this study with the researcher?	*YES*	*NO*
Have you been able to ask questions about this study and received satisfactory answers?	*YES*	*NO*
Do you understand that you are free to withdraw from this study: • At any time prior to, or during the interview? • In the two weeks following the interview? • Without giving a reason for your withdrawal?	*YES* *YES* YES	*NO* *NO* NO
Do you understand that any personal information collected during the study will be anonymised and remain confidential?	*YES*	*NO*
I understand that the interview will be audio recorded	*YES*	*NO*
I understand that parts of this interview may be used verbatim in publications/presentations but will be anonymised	*YES*	*NO*
Do you agree to take part in this study?	*YES*	*NO*

Your signature will certify that you have voluntarily decided to take part in this research study. It will also certify that you have had adequate opportunity to discuss the study with the researcher and that all questions have been answered to your satisfaction.

Signature of participant:..... Date:.....

Name (block letters):.....

Signature of researcher:..... Date:.....

APPENDIX 8: INTERVIEW SCHEDULE

Within these interviews I am interested in exploring the views of the individuals within the organisation. I want to understand why the organisation had adopted particular approaches or views, and I want to understand how the organisation interacts with state policy.

Introduction

Q1. Could you start by telling me a bit about your role within this organisation?

Prompts: How long have you worked/sat on the board of trustees? Could you tell me a bit about your work/volunteer history that brought you to this point?

Background to the organisation and its position

Q2. Please could you to describe the role of this organisation?

Prompts: What would you say are the key aspects of its role in relation to **a)** the voluntary sector locally and **b)** the statutory sector?

Q3. Why has the organisation adopted this role/set of roles?

Prompts: What has influenced the organisation in these decisions?

Q4. Have there been any particular points in the organisation's history where key decisions were made about its role or the direction of its work?

Prompts: EG has there been a culture change, or direction change at any point? What do you think prompted this change/these changes?

Public service delivery

I want to explore both the organisation's **approach** to the public service delivery agenda - so what work/activities/projects has it undertaken within this area - and the organisations **response** to this agenda

Q5. How has this organisation **responded or reacted** to this agenda?

Prompts: For example, does it support the agenda of voluntary sector involvement in public service delivery, and if so, why? Or if not, why not?

Q6. Has the organisation undertaken any specific areas of work to either support of challenge the public service delivery agenda? (Response to agenda)

Prompts: For example, have you embarked on any particular projects, policy dissemination, or specific work around supporting voluntary organisations (to prepare

for competitive bidding for contracts etc.)? How / Why was the decision to undertake this work made?

Q7. Has the organisation felt the need to challenge this agenda in any way? If so, has it taken particular action – what sort of activities has it undertaken? Have there been any implications in terms of your relationship with your members, the wider sector or state?

Q8. Would you say that the organisation gets involved to any degree in setting policy/contributing to policy – formally or informally?

Prompts: Are there any arenas where this happens? Are there any particular relationships which enable or don't not enable this to happen?

For this study, I've been reading a range of government policies which include public service delivery and the role of the voluntary sector. I've observed that during different Government administrations, the way that policies refer to the sector sometimes changes. So, for example, the state has characterised the sector as:

- separate to the state and not the focus of any real state attention
- separate to the state but with a useful supplementary role, and along with private sector providers, exist as an alternative provider of services (offering competition and part of the privatisation model)
- almost seen as part of the machinations of the state, 'independent' in name but provider of core services with a duty to play a key role in society (working in partnership with the state)

Q8. Do these characterisations ring true in terms of the experience of this organisation?

Does your organisation react to how the state positions the sector as a whole, and LIOs in particular? Where would you position your organisation in relation to the state? How do you maintain your position?

Q9. How would you characterise the relationship at the moment?

Big Society

Q10. Thinking more specifically about the Big Society agenda of the current coalition, I'd be interested to explore the particular case of Liverpool, as there was a very public rejection of the Big Society pilot back in 2011. Could you tell me a bit about the background to this public withdrawal? Do you know why Liverpool chose this course? How did this organisation respond? Have there been any implications of this decision for a) the voluntary sector, or b) the statutory sector in the City?

APPENDIX 9: RESEARCH DIARY

29.6.13

Key points from today

Local authority is in disarray - until recently they've been asking for help.

The sector still thinks there is strength in partnership.

All language is about being bold, acting, sticking on course, not being taken off-course by local authority, CCG.

- ignore some of the mess
- be less reactive
- hold nerve
- develop plan and stick to it
- promote ourselves better (shout about it, got to keep doing it) (partnership work)

Power shift - 'for the first time in years I don't feel like the nervous one'

State not in control of partnerships (they are members of some)

Developing own big ideas and sticking to them.

VCS - just got to crack on, things will settle, there will be opportunities

Task:

Have a go at writing summaries - tell the story. What are their big ideas? What aspects of context are dominating at the moment? How does this compare to national policy?

Points:

- Boundary shifting
- Focus on action
- Renavigating relationships
- New power balance
- Mythologising → self-preservation
- mission, values, identity

APPENDIX 10: EXTRACT OF DISCURSIVE ANALYSIS OF ACTOR ACCOUNTS

ORGANISATIONAL IDENTITY: MISSION, VALUES, ETHOS

A theme which is focused consistently by actors across all three organisations is the idea of the organisation's mission. It was focused upon as the central factor, which determined all organisational activity:

> "*all our activities lead back to our mission....*" (Chief Officer, Organisation B, p1)

Similarly, the Chief Officer of Organisation A raised this in terms of 'guiding principles', and the central importance that the organisation puts on "holding true" to those principles (p2 and p5). Echoing this, a trustee of the same organisation suggests that:

> *"One of the main things that, as chair, that I try to protect is the ethos that it does what it was set up today. And within that it's a very wide remit, but it's got to be doing that"* (Chair of trustees, Organisation A)

There is something very active here, in terms of the organisation making the decision to hold onto, or remain true to, the organisational mission.

Linked very closely to the idea of 'organisational mission', is the ethos and values of the organisations. These aspects of the organisational identity are referred to by participants from all three case organisations.

There is a sense, as with 'mission', that part of the significance of organisational ethos and values is that they are understood by others, and in some way have come to signify organisations within the voluntary sector. This has been referred to by a number of actors as the 'essence' of the sector, and could be considered a central aspect of the identity of organisations, and the overarching sector. It has been suggested by some that it is a key aspect which sets the voluntary sector apart from other, for example, the private sector. It has also been argued that some of these ideas have become normative characteristics assigned to organisations, without any attempt to demonstrate their worth, simply by the fact that they sit within this broad organisational field.

However, they are held onto firmly by some, for example, a trustee from Organisation A suggests,

> "*people know what they're getting and what the values are" (Chair of Trustees, Organisation A, p14*)

The ethics of the sector is an idea which is returned to again and again by a number of interviewees across all three organisations. It is a central aspect of the identity of organisations and the sector as a whole. However, the chief executive of Organisation A wants to make the point that "no sector has the monopoly on goodness".

As some of the discussions above have explored, much of what interviewees have focused upon when they consider their organisation's identity, is the perception of others. Positioning is a theme which is raised by a number of participants across all three cases, and is primarily concerned with the organisational position in relation to the large agendas or national preoccupations, as far as the organisation understands them.

Blurring the boundaries

An issue which is raised by a number of participants is the perception that the government is attempting to blur the boundaries between the sectors. One participant observed the risk to the voluntary 'identity' by the emergence of pseudo voluntary sector organisations, which are in fact public sector departments which have established themselves as a social enterprise, or community interest company,

> *"Because if you take a typical public sector organisation, and this is happening now, and you pick them all up and stick them in another building over there, and you say right now you're a social enterprise, what you end up with is exactly the same culture, but just called something else. And that's my concern, that these parts of the public sector are coming out into other areas, they're being called something else, and then allowed to compete against charities"*
>
> (Organisation A)

Jess, the chair of trustee from Organisation A reflects on this blurring,

> *"the further out you get from the model, the more it gets diluted. And you can widen the catchment area a bit, but I would prefer to be able to know exactly what a charity is, and then stick within that. And I think the government is doing that, it's trying to widen this wonderful..."*

Field in flux

In organisation A, a number of references were made to the way in which the current context has changed in recent years. This is attributed to a number of factors. Staff member from Organisation A started by alluding to a general shift in the organisation's wider context,

> *"And then obviously there's the cuts, and people's attitudes have changed a bit and people know now that they've got to be a bit more open about having these conversations and they've got to explore it at least."*
>
> (Staff, Organisation A)

When asked about how things are changing, a significant change was in the local authority, and how it relates to voluntary organisations. The chief officer from

Organisation B highlights uncertainty and lack of direction in the local authority as a factor in local unease, as he refers to the local authority as being "in disarray" and

> *"struggling to think 'what are we about as an authority'... they're not sure where they're at...they just don't have a consistent view at the moment and we're trying to nudge that consistency*".
>
> (Staff, Organisation B)

This lack of a clear identity has an impact on the field, as the local authority's struggle for clarity leads to Organisation B taking action in terms of encouraging improvement through, "trying to nudge that consistency".

Staff from Organisation A suggested that the cuts to the local authority had been a significant factor in the changing context;

> *"The city council... has gone through their upheaval as well. They've lost a lot of skill and experience, expertise and capacity, they actually need us to be strong at the minute. They need to be able to come and talk to us, and rely on us and lean on us... They probably wouldn't have bothered to talk to us about [this work] three or four years ago".*
>
> (Staff, Organisation A)

The reducing budgets have brought with them a demand to reorganise local government, which in turn has led to staff losses. All three case organisations refer to the loss of relationships as posing challenges to the established ways of working. The constraints which typify the organisational field, such as established ways of working, established relationships and appropriate lines of communication, are being replaced by an era without a clear roadmap. With the public sector described as being 'decimated' and 'in disarray', spaces are opening up within which organisations are developing new ways of working, with expertise being shared in new ways.

This changing context represents a change in the institutional landscape within which these two sectors co-exist and interact. The disarray caused by loss of staff and associated expertise has led to a weakening of the constraints which typify the organisational field, such as established ways of working, through recognised hierarchies and relationships, leading to these two organisations interacting in a different kind of way.

Field level changes

I would suggest that this represents a weakening of the field level constraints which have come to typify the voluntary sector field over the past decade or so (Local strategic partnerships and associated structures which facilitated relationships at a local level provided a way of doing things, a way of communicating, a way of

engaging). This weakening of field constraints represents a change to the field, and I now need to consider the extent to which the aspects of field-level changes can be linked back to policy ideas.

APPENDIX 11: ANALYSIS CATEGORIES

Fields Constraints

Data source	Thematic analysis	Themes: Analytical Category	Theoretical dimension	Themes: Responses described	Theoretical dimension
Organisation A: Ava, Frank, George, Jess, **Organisation B:** Daisy, Clive, Ethan **Organisation C:** Callum	Loss of acknowledged dialogue arenas – Loss of partnership groups - Unclear rules of engagement	Changing field structures	**Weakened field constraints**	Engaging with elected members more proactively in terms of getting messages through and establishing channels for voice Carving out new relationships through informal or untried channels – ad-hoc phone calls, representation 'through the back door'	**Finding alternative routes for voice and representation** (reinvigorating routes or finding new routes)
Organisation A: Ava, Claire, Frank, George, Jess **Organisation B:** Andrea, Clive, Daisy, Ethan **Organisation C:**	Upheaval and instability in the public sector - Budget cuts to public sector - Loss of relationships and working practices	Disruption at the field level	**Weakened field constraints**	Promoting and creating new ways of working together – forming new partnerships in order to work differently	**Developing inter-organisational collaborations**

Alice, Bea, Callum					
Organisation A: Ava, Frank, George, Jess **Organisation B:** Clive, Daisy **Organisation C:** Callum	Creation of CCG and associated structures - their focus on internal workings at present (not looking 'outward', lack of established relationships thus far	New, emergent field structures	**Weakened field constraints**	Actors frame the sector in terms of quality and promote the sector in those terms Actors consider how the sector can be promoted further	**Promoting the work of the voluntary sector**

Identity Work

Data source	**Thematic analysis**	**Analytical Category**	**Theoretical dimension**
Organisation A: Chris, Jess, Frank, George **Organisation B:** Andrea, Clive, Ethan **Organisation C:** Alice	Strength of mission, values and ethics of voluntary organisations. Essence of the sector Importance of core work aims and guiding principles e.g. voice The importance of charitable identity The voluntary sector holds communities together	Highlighting importance of normative identity cues associated with the voluntary sector	**Identity work based on normative identity cues aligned with ideas of 'enduring voluntary action'**
Organisation A: Ava, Chris, Frank, George, Jess, Lewis **Organisation B:**	Permanence of the voluntary sector versus the impermanence of approach of the state/statutory sector Distance between sector and state	Articulating differences between the voluntary sector and the state and embedding resistance to messages from the state	**Identity work to resist role-identity cues associated with a dominant logic**

Andrea, Clive, Daisy, Ethan **Organisation C:** Bea	Critiquing the state: Idea of state not knowing what it is about, not having clarity, not believing in anything, not understanding sector and not being realistic Distancing from ideas associated with market rationality - commissioning and specific service delivery	relating to the role-identity of the voluntary sector	

ANALYSIS CATEGORIES: IDENTITY WORK

Data source	Thematic analysis	Analytical Category	Theoretical dimension
Organisation A: Chris, Jess, Frank, George **Organisation B:** Andrea, Clive, Ethan **Organisation C:** Alice	Strength of mission, values and ethics of voluntary organisations. Essence of the sector Importance of core work aims and guiding principles e.g. voice The importance of charitable identity The voluntary sector holds communities together	Highlighting importance of normative identity cues associated with the voluntary sector	**Identity work based on normative identity cues aligned with ideas of 'enduring voluntary action'**
Organisation A: Ava, Chris, Frank, George, Jess, Lewis	Permanence of the voluntary sector versus the impermanence of approach of the state/statutory sector	Articulating differences between the voluntary sector and the state and embedding resistance	**Identity work to resist role-identity cues associated with a dominant logic**

Organisation B: Andrea, Clive, Daisy, Ethan **Organisation C:** Bea	Distance between sector and state Critiquing the state: Idea of state not knowing what it is about, not having clarity, not believing in anything, not understanding sector and not being realistic Distancing from ideas associated with market rationality - commissioning and specific service delivery	to messages from the state relating to the role-identity of the voluntary sector	