

practice paper

Co-producing knowledge: reflections on the benefits and challenges of researching in partnership with voluntary sector organisations

Eddy Hogg, Centre for Philanthropy, University of Kent, Canterbury, UK
E.Hogg@kent.ac.uk

Irene Hardill, Centre for Civil Society and Citizenship, Northumbria
University, Newcastle, UK
Irene.Hardill@northumbria.ac.uk

John Ramsey, Age UK, London, UK

This practice paper explores the co-production of knowledge in a collaborative PhD studentship funded by the Economic and Social Research Council (ESRC) and Age UK, which examined the formal volunteering undertaken by older adults in England. Some third sector organisations, especially larger ones such as Age UK, are both producers and users of social science knowledge. In this paper we critically reflect on the co-production of knowledge, and the ways in which both student and supervisors experience the co-creation of knowledge.

Introduction

Co-producing social science knowledge is an approach that requires academics and research users to work collaboratively and interactively; it is dependent on robust partnerships and an appreciation of the institutional and professional priorities that each partner holds (Hodgkinson et al, 2001). In this practice paper we seek to reflect critically on co-producing knowledge in a collaborative 'CASE' PhD studentship, funded by the Economic and Social Research Council (ESRC)¹ and Age UK² (Bell and Read, 1998). The ESRC is the major funder of social science research and postgraduate training in the UK. Its CASE³ studentships were based on a model widely used in science (MacMillan and Scott, 2003) whereby non-academic organisations and university departments jointly supported doctoral students researching topics of mutual interest (Bell and Read, 1998). In our case, a team based at Age UK and Northumbria University⁴ gained funding in 2008 to undertake research to understand '*Diversity and participation in volunteering: the contribution of older volunteers to voluntary organisations and community building*'. Age UK is one of the UK's largest charities, with a long history of serving the needs of people aged 50+ years (Age UK, 2010). It produces and uses knowledge, and it engages in partnerships with academics to co-produce knowledge in order to improve the work it does. Our partnership predated

the studentship; we had already collaborated on several ESRC-funded research and knowledge exchange⁵ projects (Hardill and Baines, 2009).

Following this introduction, the paper is divided into three sections: first, the co-production of knowledge is outlined; next, the studentship is described; and this is followed by a short conclusion reflecting on the wider implications of this studentship.

ESRC and the co-production of knowledge

In this section, we consider the changing policy context driving the production of knowledge in higher education. This, it is argued, has resulted in UK social science increasingly having to demonstrate the impact its research has on society and the economy – the benefits to individuals, organisations and nations (Hardill and Baines, 2009; Buchanan, 2013). This is enshrined in the ESRC's *Royal Charter*, which mandates it to 'advance knowledge and provide trained social scientists which meet the needs of users and beneficiaries, thereby contributing to the economic competitiveness of our United Kingdom, the effectiveness of public services, and the quality of life' (ESRC, 1994: 1). These recommendations followed the publication of the White Paper on science and technology, *Realising our potential*, in 1993 (Cabinet Office, 1993), which incentivised universities to interact more closely with the user world (Caswill and Shove, 2000). Since 1993, the ESRC has placed increasing emphasis on involving users of social science knowledge from all three sectors of the economy in the production and application of social science knowledge (Hardill and Baines, 2009; Buchanan, 2013).

The ESRC supports social science postgraduate training in those university departments it recognises as meeting its training guidelines. From 1997, university departments seeking ESRC recognition for postgraduate training have had to highlight their provision to enable students to successfully develop and manage collaborative relationships (Bell and Read, 1998). Between 1998 and 2010, the ESRC held annual funding calls for CASE studentships from academic teams (and a collaborating partner organisation) based at ESRC-recognised 'outlets' for postgraduate training (Bell and Read, 1998).

Unlike standard studentships for which the student defines the subject of the PhD, CASE studentships were scoped by academics and a collaborating partner organisation, the latter being expected to make a financial contribution (Macmillan and Scott, 2003). The identified topic was designed to be relevant to the collaborating organisation as well as to advance knowledge for a PhD. The ESRC required CASE partners (academic and user) to demonstrate collaboration in order to ensure that the studentship was supported by both organisations, including a credible supervisory team with a history of successful collaborative working. The ESRC CASE studentship application form had questions probing:

- the degree to which the research topic had been co-produced;
- the robustness of the partnership;
- the partner organisation's financial commitment;
- the wider support being offered to the student.

A key concern was to tease out the likelihood of the partnership surviving the duration of the studentship, and indeed beyond. The struggle of maintaining partnerships was

highlighted in a recent evaluation of the ESRC Follow On Knowledge Exchange scheme (Hardill et al, 2012); several of the academic award holders interviewed described their relationships with their project partners as 'brittle and liable to fracture' (Hardill et al, 2012: 3).

Collaborative studentships were a common form of collaboration for third sector organisations. Of the 335 awards made between 2000 and 2004, 50 (15%) were with third sector organisations (Demerritt and Lees, 2005), and in the year we received funding (2007-08), a third of the awards were with third sector/civil society organisations (Hardill and Baines, 2011). Throughout the period when CASE studentships were directly managed by the ESRC, a significant minority of the awards made were with third sector organisations.

The academic supervisor's partnership with Age UK predated this studentship, and included evaluation work (Hardill and Dwyer, 2011) and a CASE studentship with another department of Age UK. During 2007, John, the Head of Volunteering at Age UK, and Irene, then Professor in Human Geography at Nottingham Trent University, identified a research topic looking at the meanings and motives that underpin older adults' participation in, and attachment to, unpaid voluntary work in social welfare organisations other than Age UK. We chose this funding route as John had no pressing need for findings, so we used a tried-and-tested cost-effective funding route, requiring a limited financial outlay on the part of Age UK. The studentship offered the potential for Age UK to gain insights into volunteer motivation in organisations beyond its own organisation, with the long-term goal of feeding into its policy and practice. Such insights were directly relevant to John's national role, with responsibility for the strategic direction of the management of over 50,000 mostly older volunteers.

Once CASE funding was secured, a student was recruited to undertake the research. In the summer of 2008 we advertised nationally for a student, and received several applications, including one from Eddy, who was completing a taught ESRC-recognised Masters in Human Geography at Manchester University. Eddy applied for three studentships, two of them CASE; he was keen to do a PhD on an applied topic that met his broad interests in the social world. He was flexible about the precise topic, but the fact that the studentship was with a charity that was a household name was attractive as he wanted to see his work have impact beyond the academy.

Eddy understood the principles of CASE studentships, and looked positively on the prospect of an academically rigorous piece of work that had real-world relevance. In preparation for his interview he read everything the academic supervisors had published in the previous two years. This convinced him that their work was applied and that they had previously collaborated successfully with Age UK. He was attracted to the idea of a long-term engagement (Macmillan and Scott, 2003), a sharing of ideas, allowing 'time for interaction and exchange, for pitfalls as well as climbing out of them, are crucial to producing meaningful research relationships' (Conlon et al, 2014: 36). At this stage, however, Eddy – who had not previously undertaken applied research or worked in a collaborative partnership with a non-academic partner organisation – did not appreciate the nature of partnership working. He had presumed that the relationship would extend to other staff within Age UK, rather than one key contact within it. Collaboration, however, occurs between individuals, as the next section describes.

Co-producing research in an ESRC–Age UK CASE studentship

This section outlines the research process and highlights the central importance to the collaborative process of trust, taking ownership, and dialogue. Eddy joined an established partnership to deliver a project with research questions and methods already specified. He met his academic supervisors frequently, while supervisions with the entire team were held less frequently, once a term. Eddy was responsible for setting the agenda for these meetings, which played an important part in his developing a sense of ownership over the project from the very start. While the research topic was specified in the grant application, Eddy needed to develop a sense of ownership of the project to ensure that it was completed on time, producing results that were useful to the partner organisation, and of a quality to lead to a PhD.

Eddy reshaped the project in two distinct ways. The first change happened when the scope of the study was broadened, from fieldwork focusing on organisations – other than Age UK – delivering social welfare and providing volunteering opportunities for older adults to include organisations from across the third sector with older volunteers. He raised this in an academic supervision, and was advised to consult John directly. Following John's agreement, Eddy quickly felt that ownership of the collaboration moved from the supervisory team to him and the management of the relationship became his responsibility (Macmillan and Scott, 2003). This was a pivotal moment, as from that point on, Eddy worked more directly with John, rather than dealing with him via his academic supervisors. The pre-existing partnership was extended to include Eddy as an equal partner – this is essential in a relationship as it creates trust and a mutual sense of purpose. The fact that John and Eddy were quick to develop a professional relationship was central to this, as was Irene and John being willing to open their existing partnership to him. These negotiations and meetings – facilitated by an existing partnership – enabled us to freely discuss the research and work to meet the 'differing expectations around the collaborative research project' (Macmillan and Scott, 2003: 102). Collaboration occurs between individuals, and the establishment of these relationships was essential to the knowledge sharing that followed.

The second change was to place particular emphasis on the 'lifecourse' as an underpinning concept for the thesis. The lifecourse is defined as 'a sequence of socially defined events and roles that the individual enacts over time' (Giele and Elder, 1998: 22). A lifecourse approach afforded Eddy the opportunity to examine individuals' life histories using a variety of data gathering tools, to understand how life events and histories of volunteering and other forms of work (paid and unpaid) influenced decisions to volunteer in old age. A visual representation was developed, with guidance from the academic supervisors. This focus was constantly negotiated through dialogue with John, who was clear that older volunteers must remain as the main theme.

Eddy feels that if the PhD had not been conducted in collaboration with John and Age UK, he would at this stage have begun to look at volunteering across the entire lifecourse, and not just among older adults. Instead, a compromise was reached, which met all of our needs and through which both Eddy and John felt they were gaining what they wanted. Macmillan and Scott (2003) note that such negotiations take place throughout a collaborative PhD, and that as a result a degree of ambiguity may remain as to who has ownership of the project. John helped to guide the research without making demands on what was done (other than stipulating that the focus remained

on older people) and, as a result, Eddy felt he had a high degree of ownership of the project, including the direction of the research. Consequently, the ultimate focus of the PhD was what he wanted it to be. The level of trust in the relationship allowed clear ownership to remain with Eddy through these negotiations. Maintaining trust and taking ownership of a project are both essential and inseparable bedfellows for collaborative research to deliver outcomes.

The research questions remained largely the same, as did the methods employed, which consisted of a national online survey of third sector organisations on their engagement with and management of older volunteers. In-depth interviews were undertaken with key managers in a subset of organisations and life history interviews were conducted with 26 older volunteers. The national online survey did not include Age UK organisations but focused on other third sector organisations providing volunteering opportunities for older people. These were accessed through Councils for Voluntary Service and Volunteer Centres across England, a database of which was produced by Eddy, having been pointed towards them by Irene and John. John's professional contacts within the sector were extremely useful during the data collection, opening doors and acting as a helpful gatekeeper.

During the fieldwork phase, Eddy felt that it added credibility to him as a postgraduate to introduce himself as a researcher working in collaboration with Age UK, and it helped to reassure participants that the research Eddy was conducting was worthwhile and useful, something Macmillan and Scott (2003) suggest is a common strategy for those undertaking collaborative research. However, while he introduced himself as a 'researcher working in partnership with Age UK', he did not really feel that he was. Rather, he felt that he was working in partnership with one Age UK employee, John. This could reflect the fact that fieldwork was undertaken in organisations not part of Age UK, and that during the studentship Age UK was undergoing restructuring following the merger of Age Concern with Help the Aged.

During the data analysis stage, the entire supervisory team was involved. Summaries of emerging findings in the form of short reports and briefings were provided by Eddy. These were discussed during tutorials. During these, different knowledges, not merely epistemic knowledge but also *techne* and *phronesis* (the knowledge of practitioners and citizens), were used to understand the emerging findings (Flyvbjerg, 2001), highlighting ways that collaborative studentships mobilise multiple knowledges. Moreover, during the studentship John began to use these emerging findings to inform his work. John was very clear what findings would be particularly useful to him and to Age UK. Most useful to him were insights from organisations other than Age UK into the ways in which older people get involved in volunteering, what strategies help to retain them and what barriers exist to older people volunteering in the first place. While Eddy produced reports on all stages of data collection for Age UK (via John) to use, the PhD primarily drew on the in-depth life history interviews with older volunteers. Through regular dialogue, John was able to filter the data and analysis useful to Age UK, while Eddy could filter the data and analysis to feed into the doctoral thesis. Collaborative studentships allow for multiple uses of data, thereby facilitating both academic and wider impact, in this case on policy and practice within a third sector organisation.

Collaboration to deliver impact on policy and practice had been woven into the fabric of the PhD. Beyond the relationship between the student, supervisors and John at Age UK, Eddy attended and spoke at a variety of academic and charity sector

conferences and seminars over the course of his doctoral study. Towards the end of the studentship, rather than attending conferences, the focus moved to knowledge exchange events to disseminate and explore the research with different user audiences. Together in December 2011 we prepared a public policy seminar, which was co-convened by the ESRC, the Institute of Volunteering Research (IVR) and the Centre for Civil Society and Citizenship at Northumbria University.⁶ The practitioner audience was drawn from the third sector, and included older volunteers. The seminar allowed for the sharing of research outputs and discussion of analysis to feed into how the sector in the North East of England engages with older volunteers. Similarly, in 2013 we were awarded funds to disseminate the PhD findings as part of the 2013 ESRC Festival of Social Science, and to this end we worked with Gateshead Council and their Older People's Assembly. Again, this involved direct knowledge exchange with third sector organisations and policy makers in the North East, with the utility of the research endorsed by John and Age UK.

Following the award of the thesis, John requested that Eddy produce an Executive Summary. Eddy was expecting Age UK to require a final report but they did not, as John had already been using the key findings – as they emerged – to develop Age UK's strategic work on enabling and encouraging statutory bodies and other third sector organisations to promote volunteering and social action among older people. John used the reports that Eddy produced throughout the studentship to inform the work of his department; he gained insights into the work that older volunteers undertook in a diverse range of organisations, large and small, and the barriers and opportunities that older volunteers encountered in beginning and continuing volunteering. As noted above, throughout the four years of the studentship John was closely involved in the fieldwork, participated in the data analysis and contributed to the emerging findings. In other words, John had co-produced the research throughout the process and therefore did not need a formal research output in the form of a final report. While the CASE studentship method of collaboration had suited John because he was in no rush to get findings, he nonetheless did not have to wait until the end of the process to feed them into Age UK's work.

Conclusion

In this practice paper we have examined the ways in which a collaborative PhD studentship, co-supervised by an academic team and the Head of Volunteering at Age UK, co-produced knowledge that resulted in a PhD. As well as this, during the studentship a series of progress reports and a wider range of data than were eventually included in the PhD thesis – including data on enabling and encouraging statutory bodies and other third sector organisations to promote volunteering and social action among older people – informed the strategic work of Age UK. The policy and practice impact that resulted from the collaboration did not occur at the end of the studentship, but rather was a feature throughout through dialogue with John. The co-production of knowledge is dependent on robust partnerships, built on trust, and forged and sustained by people who invest time and energy in them. With collaborative studentships, these partnerships have to be extended to embrace the student, and for a studentship to succeed all parties have to be flexible to accommodate new ideas from the student, while ensuring that the needs of the collaborating partner organisation are still met. Partnerships take time to form and grow, and CASE studentships offered

excellent potential for deep collaboration, once trust had been established. Without investing in the ways described above, it is unlikely that the knowledge produced will be genuinely co-created or prove as valuable for all partners.

Notes

¹ The ESRC is one of seven non-departmental public bodies sponsored by the Department for Business, Innovation & Skills (BIS). It receives funding primarily through grant-in-aid from central government – today this funding comes from BIS, and forms part of the UK Science Budget.

² Age UK was created in April 2009 following the merger of Age Concern and Help the Aged.

³ CASE originally stood for Collaborative Award in Science and Engineering.

⁴ The studentship was first held by Nottingham Trent University with Professor Peter Dwyer as second supervisor, and moved to Northumbria University in 2010 when Irene Hardill moved institutions, and Dr Siobhan Daly joined the supervisory team.

⁵ Knowledge exchange funding opportunities are designed to offer support for new and additional knowledge transfer activities that are likely to have an impact on policy and practice.

⁶ www.esrc.ac.uk/funding-and-guidance/collaboration/seminars/archive/older-citizens-seminar.aspx

Dedication

In memory of our colleague and friend John Ramsey, Head of Volunteering, Age UK, who died peacefully on 20 September 2014.

Acknowledgement

The research reported in this paper was supported by ESRC CASE studentship ES/G029806/1. The authors alone are responsible for the opinions and interpretations expressed in the paper.

References

- Age UK, 2010, History, www.ageuk.org.uk/about-us/who-we-are/our-history/
- Bell, E and Read, C, 1998, *On the CASE: Advice for collaborative studentships*, Swindon: ESRC
- Buchanan, A, 2013, Impact and knowledge mobilisation: what I have learnt as chair of the Economic and Social Research Council Evaluation Committee, *Contemporary Social Science*, 8, 3, 176-90
- Cabinet Office, 1993, *Realising our potential: A strategy for science, engineering and technology*, Cm 2250, London: HMSO
- Caswill, C, Shove, E, 2000, Introducing interactive social science, *Science and Public Policy*, 27, 3, 154-7
- Conlon, D, Gill, N, Tyler, I, Oeppen, C, 2014, Impact as odyssey, *ACME: An International E-Journal for Critical Geographers*, 13, 1, 33-38
- Demeritt, D, Lees, L, 2005, Research relevance, 'knowledge transfer' and the geographies of CASE studentship collaboration, *Area*, 37, 2, 127-37
- ESRC (Economic and Social Research Council), 1994, *Royal charter*, Swindon: ESRC
- Flyvbjerg B, 2001, *Making social science matter: Why social inquiry fails and how it can succeed again*, Cambridge: Cambridge University Press

- Giele, J, Elder, P, 1998, *Methods of lifecourse research: Qualitative and quantitative approaches*, Thousand Oaks, CA: Sage Publications
- Hardill, I, Baines, S, 2009, Personal reflections on knowledge transfer and changing UK research priorities, *21st Century Society*, 4, 1, 83-96
- Hardill, I, Baines, S, 2011, *Enterprising care: Unpaid voluntary action in the 21st century*, Bristol: Policy Press
- Hardill, I, Dwyer, P, 2011, Delivering public services in the mixed economy of welfare: perspectives from the voluntary and community sector in rural England, *Journal of Social Policy*, 40, 1, 157-72
- Hardill, I, Moss, O, Biddle, P, 2012, *Evaluation of the ESRC Follow On Scheme: Report prepared for the Evaluation Committee*, Swindon: ESRC
- Hodgkinson, G, Herriot, P, Anderson, N, 2001, Re-aligning the stakeholders in management research: lessons from industrial, work and organisational psychology, *British Journal of Management Research*, 12 (special issue), S49-S54
- Macmillan, R, Scott, A, 2003, On the case? Dilemmas of collaborative research, *Area*, 35, 1, 101-9