Learning as a process of personal-social transformation: volunteering activity in health and social care charities

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ABSTRACT
This paper explores how people learn about global societal challenges as they work towards them in collaborative activity. It focuses on the activity of volunteering within UK health and social charities and draws upon the approach of Transformative Activist Stance to conceptualize learning in this environment as a form of individual and social transformation. The study is a multiple qualitative case study, which includes three charities that address complex health and social challenges. By exploring how volunteers learn about and address complex societal challenges findings show the transformative opportunities this process offers for volunteers, the charity, and the wider community.

This study builds on and expands the theoretical perspective of Transformative Activist Stance (TAS) by drawing upon it to examine the process of learning in the currently underexplored area of the charity and voluntary sector. The article begins by outlining how TAS helps to overcome dualistic approaches to human development and why this is particularly important in the charity and voluntary context. TAS is then presented in further detail, specifically highlighting its dialectical concept of personal and social transformation. The article goes on to explain the relevance of this concept to the charity context, where volunteers are working toward and learning about complex societal challenges. The case study methodology is then justified, and the selected methods and analysis process are explained. Findings relating to personal and social transformation are presented, and, finally, the contribution of the study toward advancing TAS is summarized.

Dualistic approaches to human development that separate cognitive processes and social influence have long been challenged and critiqued through a cultural-historical activity theory (CHAT) perspective as being unable to explain processes of learning (e.g., Karimi-Aghdam, 2016; Stetsenko, 2016a). This problem has been highlighted through the approach of TAS (Stetsenko, 2008) as neglecting the ethical and value-based foundations of the Vygotskian tradition and being particularly inadequate to address societal challenges and social change in the current time of social and political turbulence (Stetsenko, 2016b). So far there have been few studies on how people learn about global societal challenges, such as violence, poverty, and chronic health conditions. These complex issues are dynamic and may require “learning what is not yet there” (Engeström & Sannino, 2010, p. 2) as the object of learning could be described as “not stable, not even defined or understood ahead of time” (Engeström, 2001, p. 137).

The study addresses this gap by focusing on the activity of volunteering within health and social care charities where people freely give their time to collectively address complex health and social challenges and, through this process, learn about them. Despite being developed from studies on social change, TAS has so far not been widely drawn upon to examine the learning processes of people volunteering within charities. This study presents the charity and voluntary environment as a

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fruitful context within which learning can be understood as a dialectical process of social and individual transformation. In particular, the study presents learning in this environment as not simply about acquiring value-neutral knowledge, but as more concerned with “becoming a certain kind of a person” (Vianna & Stetsenko, 2014, p. 582).

Findings are presented from a multiple case study involving three health and social care charities based in North West England. Multiple qualitative methods including observations of volunteer training, charity staff interviews, and interviews and focus groups with volunteers allowed a range of perspectives and positions to be taken into account. Each charity addresses a complex health and social issue including stroke, sexual violence, and HIV and relies on volunteers to help provide services. Dealing with such complex issues and supporting vulnerable populations means that training and development is often a mandatory part of the volunteer process within charities. It has even been argued that without training, volunteers might do more harm than good (Siu & Whyte, 2009).

By exploring how people learn about complex societal challenges and conceptualizing these as objects of volunteering activity findings show the transformative opportunities this process offers for volunteers, the charity, and the wider community. The collectively constructed knowledge of volunteers is a mediating tool that enables such transformation. The charity and voluntary environment is presented as a useful context for illuminating and developing particular aspects of TAS, such as values, emotion, and imagination. Across the cases there were examples of volunteers becoming activist learners by overcoming contradictions within their activity through their strong emotional connection to and imagined outcome of the object of their volunteering activity (Vianna, Hougaard, & Stetsenko, 2014).

Transformative Activist Stance

The approach of TAS has been developed to explore concerns of transformation, activism, and social change (Stetsenko, 2008), making it a useful perspective to draw upon to explore the learning processes of volunteers within health and social care charities. TAS is informed by the CHAT view of collaborative activity through which

people not only constantly transform and create their environment; they also create and constantly transform their very life, consequently changing themselves in fundamental ways while, in and through this process, becoming human and gaining self-knowledge and knowledge about the world. (Stetsenko, 2008, p. 483)

TAS is defined in this article as individuals collaboratively and actively working toward a meaningful life project and through this process transforming the world and themselves. Such meaningful life projects or pursuits involve a commitment to changing social and community practices and are mediated through the use of theoretical knowledge as a “transformative tool” (Vianna & Stetsenko, 2011, p. 317). In this process individuals change their world, gain knowledge, and become “unique individuals” (Vianna & Stetsenko, 2011, p. 318). This ongoing process of becoming as a form of personal transformation is central to the conceptualization of learning in TAS and is defined as

a path of a continuous, ceaseless, and dynamic moment-to-moment transformation in one’s standing and relations vis-à-vis the social world carried through one’s own active pursuits whereby a person is constantly changed yet without positing any ontological breaks with the previous states of Being. (Stetsenko, 2012, p. 144)

In TAS, this process is not a “mundane occurrence,” but one that involves struggle as individuals take “an activist stance vis-à-vis the world” and commit themselves to “a vision of how the world should be and to developing a life project to achieve this vision” (Stetsenko, 2012, p. 151). Such a life project or activist project is “imbued with dialogism, ethics, and interrelatedness” and is grounded in collaborative and purposeful activity (Stetsenko, 2012, p. 147). TAS links to the critical pedagogy work of Freire and prioritizes values, activism, and social change, which emphasizes a purposeful transformation of the world, rather than adaptation to existing conditions (Stetsenko, 2008).
TAS highlights the unique position of individuals or subjects within an activity and their activist stance toward the object or force driving the collective activity forward. The status of volunteers conceptually and practically is a key differentiating factor to current research informed by TAS, which has concentrated on projects of social change in educational (e.g., Vianna et al., 2014) and other statutory institutions (e.g., Vianna & Stetsenko, 2011, 2014). How subjects are positioned and how they position themselves in an activity through a division of labor has a fundamental impact on access to knowledge, participation in practices, and therefore the potential for transformation. For example, volunteers are positioned differently within the system of a charity to paid workers, and the relationship and possible conflicts between these two different “workers” have been previously discussed in volunteering literature. Conflicts include a perceived threat to paid staff positions and differing perceptions of the identity of the organization (Kreutzer & Jäger, 2011). Such conflicts could be described as historically accumulating contradictions (Engeström, 2001), which provide an opportunity for transformation.

Through the perspective of TAS, as individuals act on meaningful life pursuits through collaborative activity they gain knowledge about the world and themselves (Stetsenko, 2008). This dialectical approach allows learning to be viewed as an ongoing and relational process, which challenges the idea of passive subjects merely reacting or adapting to their environment. Instead, subjects are positioned as active agents able to change themselves and therefore their environment: They are activists committed to social change (Stetsenko, 2014). This conceptualization provides a view of learning where knowledge is a purposeful activity to be “performed and enacted” (Stetsenko & Arievitch, 2004, p. 68), manifested in transformation, and “conducted in view of social goals and agendas” (Stetsenko & Arievitch, 2004, p. 60).

Central to this process are ethics and values, which are the axiological dimensions of TAS that are inseparable from learning (Stetsenko, 2016b). The following section sets out the context for this study, which is particularly ripe for exploring these dimensions. Part of the uniqueness of the charity and voluntary sector and what distinguishes it from government and private sectors is its “values-expressive character” (Jeavons, 1992). Therefore, the connection between knowledge and values and emphasis on social change is particularly relevant to exploring learning within this specific context. This article positions the activity of volunteering within health and social care charities as an important substantive, yet currently underexplored, area of learning with the potential for theoretical advancement.

Following a TAS perspective, the volunteer activity is not considered to be separate to development and learning, but is “the very realm that these processes belong to and are carried out in” (Stetsenko, 2008, p. 480). The study also addresses the scarcity of empirical research in the development of TAS (Ritchie, 2008) and positions the charity and voluntary environment as particularly fruitful to further develop particular aspects of this theory, such as emotion and imagination.

**Volunteers and complex societal challenges**

Charities and other voluntary groups working in the area of health and social care have a long history and tradition of dealing with complex societal challenges and working to create transformative change. For example, the role of volunteers in voluntary and community groups was instrumental in addressing the first cases of HIV and AIDS in the United States (Chambré, 1991), and women volunteers in UK Rape Crisis centers have come together to support survivors of sexual violence since the 1970s (Rath, 2008). Such societal challenges, which involve learning about “emotionally laden topics” (Hutchinson & Quartaro, 1993, p. 93), are described in CHAT as runaway objects that are difficult to control and predict:

They seem to have a life of their own that threatens our security and safety in many ways. They are contested objects that generate opposition and controversy. They can also be powerfully emancipatory objects that open up radically new possibilities of development and well-being. (Engeström, 2008, p. 227)
The process of working toward the object of an activity is relational and implemented through negotiation and dialogue (Miettinen, 2005), which also involves emotion or “the passions that imbue human activity” (Nardi, 2005, p. 41). Nardi (2005) outlined the transformative potential of the emotions of subjects on the activity and particularly its object, and Roth (2007) argued that emotions are “integral to what people do and know in the workplace” (p. 41). An “emotional investment” is identified as being central to the motivation of long-term volunteers (Rochester, Ellis Payne, & Howlett, 2010, p. 29). This kind of “emotional payoff,” according to Roth (2007), is why subjects assert their agency and participate in certain activities:

Individuals choose to participate in activities and, as part of this participation, choose goals that promise some type of payoff—more often than financial, payoff is related to satisfaction, sense of accomplishment, expansion of action possibilities, expansion of control over life conditions—and higher emotional valence. (p. 55)

Following the perspective of TAS, as volunteers are motivated to collaboratively work toward these runaway objects, they transform not only the world but also themselves. This dialectical process of transformation is not in addition to learning, but an integral part of learning and development (Stetsenko, 2008). Conceptualizing this learning process through the perspective of TAS helps to avoid taking a dichotomous approach to the learning and development of volunteers that concentrates on either training evaluations of tasks or informal learning “on the job.” Engeström (1995) argued that analyzing learning through these separate approaches cannot account for the motivation for and future possibilities of the activity, which are vital considerations when “faced with societal change and institutional contradictions” (p. 411). Such an approach also neglects the emotions integral to learning and leads thinking to become an “autonomous stream,” which is “divorced from the full vitality of life, from the motives, interests, and inclinations of the thinking individual” (Vygotsky, 1987, p. 8).

Volunteers work toward these objects of activity from their unique stance and position within the charity. They will have individual goals for getting involved in the volunteering activity, such as a personal or professional connection to the charity cause, and will relate to the shared object of collaborative activity through these different motives. Volunteers are considered to transform these organizations by providing a unique contribution to people using the charity services through the voluntary nature of their role as opposed to staff, who are being paid to support them (Taggart, Short, & Barclay, 2000). However, the affordance for agency and voice from these different positions has also been considered to impact on volunteer retention as “when something goes wrong, volunteers may be less invested in addressing the problem than paid staff and may simply leave rather than working with the organization to fix the trouble” (Garner & Garner, 2011, p. 814). Positioning volunteers within the environment or system of a charity is important for avoiding conceptualizing volunteering as an isolated “individual behavior,” which neglects the organizational and institutional context of volunteering (Hustinx, Handy, & Cnaan, 2010).

Volunteers have been described as “professional amateurs” (Andreassen, Breit, & Legard, 2014), which involves a balance and possible tensions between formalized training and the authenticity of personal experiences or “experiential knowledge” (p. 335). Within this context an instrumental, individualized view of learning in which volunteers simply acquire static knowledge and skills from the charity organization is limited. At the same time purely looking at informal learning within the role is also insufficient, as the scientific or abstract knowledge involved in these challenges, such as defining HIV or a stroke and how it affects the body and what are the psychological effects of sexual violence, need to be taught and learned systematically through instruction (e.g., Vygotsky, 1987).

**Methodology**

This research followed a case study methodology, which provides an “extended, holistic view that allows for the contribution of multiple perspectives” (Barab, Evans, & Baek, 2004, p. 208) and allows the analysis of “concrete, real-life instants of human activity” (Roth & Radford, 2011, p. 9). This
section explains and justifies the methodology in further detail, including a description of the cases, data generation methods, and the process through which TAS was incorporated into data analysis.

The aim of the case study methodology in this research was particularization: “To present a rich portrayal of a single setting to inform practice, establish the value of the case and/or add to knowledge of a specific topic” (Simons, 2009, p. 24). A further aim was analytic generalization in order to expand and generalize theory (Yin, 2003) and specifically to broaden the theoretical perspective of TAS to a new empirical context (Ridder, Hoon, & McCandless Baluch, 2014). To strengthen analytic generalization, a multiple case study of three organizations was conducted (Yin, 2003). The unit of analysis in each case was the group of volunteers who were involved in delivering services, and the charitable organization was the context of each case. This definition of the case allowed volunteering to be viewed as an activity developed in a social and cultural context over time, where a community of subjects work toward a shared object and are organized through a division of labor according to the rules of the community. This context was useful to further understanding the individual subject within a collective activity, as called for by previous CHAT research (e.g., Daniels & Warmington, 2007).

Ethical approval was granted from the University of Manchester prior to data collection, and findings have been anonymized with the use of pseudonyms to protect the identities of participants and organizations.

Case studies

The charity and voluntary sector is not homogenous (Macmillan, 2013; Milbourne, 2013), but as the charity environment is of particular interest to this study I decided to focus on formal volunteering, which is defined as freely giving unpaid help as part of an organization to benefit others (Department for Communities and Local Government, 2010). Health and social care charities were selected that engage in health-related activities and that provide human and social services to a community or target population (Salamon & Anheier, 1996), which often includes vulnerable individuals (Department of Health, 2000, p. 9).

The study aims to explore how volunteers learn about complex societal challenges as they work toward them within the charity and voluntary environment. Three charities were purposely chosen as typical case studies to highlight these aspects, and each case addresses a complex health and social challenge including stroke (CS1), sexual violence (CS2), and HIV (CS3; see Table 1). The charities in this study have a long history of addressing complex health and social care challenges and rely on volunteer labor to deliver services. In CS1 volunteers are described as “the lifeblood” of the charity,

### Table 1. Case Descriptions

| Case Study | Narrative Description | Volunteer Roles and Training |
|------------|-----------------------|------------------------------|
| CS1        | A national charity that has worked for over 40 years on a regional basis to provide a range of services to support people affected by stroke: 4,000 volunteers work alongside 650 paid staff. | Variety of roles supporting stroke survivors, including communication support, social groups, and ambassadors. Organized training sessions include what causes a stroke, the effects of a stroke, and how to take and interpret blood pressure measurements. |
| CS2        | A city-based charity that has supported women who have experienced sexual violence at any point in their life for over 40 years: 50 volunteers work with two members of staff. | The main volunteer roles are helpline workers and counselors. Organized training sessions include rape and the law, active listening skills, and psychological and physical effects of sexual violence. |
| CS3        | A regional charity that has been working for over 30 years to provide a range of services to anyone living with, and affected by, HIV: 125 volunteers work alongside 15 members of staff. | Variety of roles, including facilitating group spaces, peer support, and events. Organized training sessions include the biological effects and social impact of HIV, how treatment works, and safeguarding issues. |
and Gillian, the volunteering advisor, said that “services would just not operate without volunteers.” Similarly volunteers in CS3 are described as being at the heart of the organization, and in CS2 Nadja, a volunteer trainer, said “the organization wouldn’t be able to run without the volunteers.”

Each case was selected for inclusion in the study, as it was considered to contain certain qualities that made it instrumental in understanding learning about complex challenges (Stake, 1995). These qualities included the challenging cause that each charity addressed, the volunteer activities that involved directly supporting people using the services of each charity, and the initial and ongoing training and learning opportunities available to volunteers. All cases were based in North West England, as that allowed me as the researcher to spend time in each case and to build up trust and generate data within the available resources. The multiple cases did not intend to be comparative. Findings were synthesized across cases to increase the richness of data, to gain a broader view of perspectives of learning experiences within volunteering in different contexts, and to deepen transferability of findings.

The cases in this study were chosen through strict criteria, but were also organizations I had personal contact with as a volunteer. During the study I volunteered within each charity once a month, and I attended volunteer meetings and conferences. In CS1 I volunteered in a communication support group for stroke survivors, in CS2 I volunteered on the helpline, and in CS3 I volunteered at support groups and external events. My experience and knowledge as a volunteer within all cases and my perspective and “stance” were useful tools for the study in terms of gaining access to the research sites, understanding and being familiar with the charity environment, and gaining the trust of research participants.

Methods

Data generation took place over the period of 1 year from May 2014 to May 2015. Qualitative methods were conducted to encompass the different perspectives and voices within each case. Methods are described in detail next and in each case included observations of two organized training sessions, semistructured interviews with two staff members and six volunteers, and one focus group ranging from three to seven volunteers (see Table 2 for a timetable). Participants were primarily selected on the basis of increasing understanding of and providing an opportunity to learn about the case (Stake, 1995; see Table 3 for participant list). Documents from each charity (e.g., policies, websites, and handbooks) provided data on context, culture, and history in order to enhance the understanding of each case (De Vaus, 2001).

Observations enabled me to observe practices of training and the charity environment about which I would then question participants within the interviews and focus groups. The aim of using focus groups was to elicit the multiple voices and dialogue within an activity system (Engeström, 2001), specifically focusing on the experiences of volunteers regarding learning and training. Volunteers were selected for individual interviews from either their contributions in the focus groups or conversations I had with them during the observations. Interviews enabled an understanding of “the lived experience of other people and the meaning they make of that experience” (Seidman, 2006, p. 9). The use of interviews and focus groups intended to construct the activity and practices of volunteering through the “eyes and interpretations” of multiple members of the activity.

Table 2. Data Generation Time Line

| Charity | Observations | Focus group | Interviews |
|---------|--------------|-------------|------------|
| CS1     | May and June 2014 (induction training and ambassador training) | September 2014 (3 volunteers) | June 2014–March 2015 (2 × staff and 6 × volunteers) |
| CS2     | October 2014 (two helpline training sessions) | November 2014 (7 volunteers) | December 2014–April 2015 (2 × staff and 6 × volunteers) |
| CS3     | November 2014 and January 2015 (HIV update training and peer mentoring training) | February 2015 (4 volunteers) | February–May 2015 (2 × staff and 6 × volunteers) |
| Case | Pseudonym       | Length of Time Volunteering | Volunteer Activities                                                                 | Method Participated in             |
|------|-----------------|-----------------------------|-------------------------------------------------------------------------------------|-----------------------------------|
| CS1  | David (m)       | 20 years                    | Community speaking, taking blood pressures at public events, supporting service users in groups | Focus group; interview             |
|      | Glenn (m)       | 3 years                     | Community speaking, taking blood pressures at public events, supporting service users in groups, driving service users | Focus group                        |
|      | Keith (m)       | 3 years                     | Community speaking, taking blood pressures at public events, supporting service users in groups | Focus group                        |
|      | Carmel (f)      | 6 years                     | Supporting service users in groups                                                  | Interview                          |
|      | Jerry (m)       | 11 years                    | Community speaking, taking blood pressures at public events, supporting service users in groups, driving service users | Interview                          |
|      | Noel (m)        | 6 years                     | Community speaking, taking blood pressures at public events, supporting service users in groups | Interview                          |
|      | Hazel (f)       | 7 years                     | Community speaking, taking blood pressures at public events, supporting service users in groups | Interview                          |
|      | Greg (m)        | 3 years                     | Taking blood pressures at public events, supporting service users in groups          | Interview                          |
|      | Gillian (f)     | 8 years                     | National volunteering advisor and trainer                                           | Interview                          |
|      | Eilyiah (f)     | 10 months                   | Regional volunteer support and training Volunteer Activities                        | Interview                          |
| CS2  | Sophia (f)      | 1 year                      | Answering calls to the helpline                                                     | Focus group; interview             |
|      | Terry (f)       | 2 months                    | Answering calls to the helpline                                                     | Focus group; interview             |
|      | Rebekah (f)     | 2 months                    | Answering calls to the helpline                                                     | Focus group; interview             |
|      | Stephanie (f)   | 2 months                    | Answering calls to the helpline                                                     | Focus group                        |
|      | Hayley (f)      | 2 months                    | Answering calls to the helpline                                                     | Focus group                        |
|      | Shauna (f)      | 2 months                    | Answering calls to the helpline                                                     | Focus group                        |
|      | Gia (f)         | 2 months                    | Answering calls to the helpline                                                     | Focus group                        |
|      | Joni (f)        | 3 months                    | Answering calls to the helpline                                                     | Interview                          |
|      | Justine (f)     | 4 months                    | Answering calls to the helpline                                                     | Interview                          |
|      | Harmony (f)     | 7 months                    | Answering calls to the helpline                                                     | Interview                          |
|      | Klara (f)       | 5 years                     | Counselor, volunteer manager, trainer                                               | Interview                          |
|      | Nadja (f)       | 7 years                     | Trainer Volunteer Activities                                                        | Interview                          |
| CS3  | Alaia (f)       | 1 year                      | Supporting public events                                                            | Focus group; interview             |
|      | Kayla (f)       | 6 months                    | Supporting service users in groups, supporting public events                        | Focus group; interview             |
|      | Jacqueline (f)  | 25 years                    | Community speaking, supporting public events                                        | Focus group; interview             |
|      | Brett (m)       | 1 year                      | Supporting individual service users, supporting public events                       | Focus group; interview             |
|      | Michael (m)     | 10 months                   | Supporting individual service users, supporting public events                       | Focus group; interview             |
|      | Alejandro (m)   | 6 years                     | Supporting service users in groups, supporting public events                         | Interview                          |
|      | Alex (f)        | 9 years                     | Volunteer manager and trainer                                                       | Interview                          |
|      | Joshua (m)      | 3 years                     | Service advisor and trainer                                                          | Interview                          |
(Engeström & Miettinen, 1999, p. 10). Overall, multiple methods intended to triangulate results and increase trustworthiness and credibility (Bryman, 2012).

**Analysis**

Data analysis followed the process of abduction, which refers to “the process of moving from everyday descriptions of the social world to social scientific descriptions and analyses of it” (Vogt, 2005, p. 1). Brinkmann (2014) argued that abduction avoids a simplistic and restrictive relationship between data and theory and concerns “the relationship between a situation and inquiry” (p. 722). For the analysis of my data I followed three stages as outlined by Åsvoll (2014, p. 293). First I looked for surprising ideas within the data then looking for explanations, second I tested new ideas that come out of this process by drawing upon the theoretical framework of TAS, and third I returned to the data with these new explanations to ensure that they had sufficient empirical basis. These stages are not individual components, but intend to be “mutually interdependent” (Åsvoll, 2014, p. 293) as part of an iterative process.

This approach allowed the incorporation of the theoretical framework in a way that rigorously tested it. For example, by being sensitive to surprising ideas I paid particular attention to what Engeström and Sannino (2011) described as “discursive manifestations of contradictions” within the data (p. 372). These manifestations include expressions such as “but” and “we/I have to,” which can be seen in the following quote from the interview with stroke volunteer David as he discussed information he saw as being “withheld” from him because of his position as a volunteer: “That makes it difficult. But [emphasis added] you are not going to be party to all information. You have to [emphasis added] accept that.

Within analysis this example was highlighted as a potential contradiction within the division of labor. Drawing upon the theoretical framework to identify such contradictions was useful because it prompted asking interesting and relevant questions around potential areas of transformation to explore in further detail. In this way the process of abduction helped to avoid the theoretical framework becoming a self-fulfilling prophecy (Mills & Bettis, 2006). The theoretical perspective of TAS was used as a lens to sensitize me to certain points in the data for both agreement and resistance, which directed the study in two directions: “Both toward and away from the perceptions and concepts of the framework” and thus enabled analysis to “go beyond what our frameworks provide us” (Mills & Bettis, 2006, p. 83).

**Findings and discussion**

**Learning as a process of transformation**

Through the lens of TAS, learning across the cases was conceptualized as a process of transformation through which individual volunteers, the charity, and the wider environment could be transformed. Learning as a form of transformation is therefore not conceptualized as a linear movement from one static state to another, but rather a process of interaction between the individual and their environment (Vygotsky, 1994). Although this process is dialectical for analytical purposes, examples of personal transformation and social transformation within and beyond the organization are discussed separately in the following sections.

**Personal transformation**

**Questioning the status quo and imagining the future**

Volunteers across all cases joined the charity with their own unique sociohistorical position (Vianna et al., 2014) toward the charity’s cause, which included their awareness and personal experience of it. These positions were discussed as a group during the training sessions I observed in each charity.
However, in each case volunteers described how they were confronted with the “enormity” of the charity’s cause through their volunteering activity. This was seen most clearly in CS2 in the training session on rape and the law:

It’s so black and white, there is so little success in prosecuting and what women go through to go to trial and not have prosecution and a judgment at the end. I always find that session very heavy. I always find that the whole mood of the group usually goes—wow, this is the stark reality. So no matter how well we support someone on the phone and build them up, that’s the harsh reality of how it is. I find that quite challenging—to find ways of bringing that session across without crushing people, without destroying the hope really that they could do valuable work. (Nadja, helpline trainer, interview)

Confrontations with this “harsh reality” provoked volunteers to question and challenge their existing beliefs, practices, and previous experiences, as well as wider politicized norms, or as Stetsenko (2014) described, the “status quo”:

I had assumed that if somebody called and said what’s the procedure for making a complaint with the police? It would be like, oh you feel ready to do this—good. But it’s not. It’s like, you be aware that this is a long arduous process that maybe won’t have any positive impact for you whatsoever. So it’s the realization that these crimes are going to go unpunished . . . and I suppose I like to have faith in our justice system. (Joni, helpline volunteer, interview)

As this quote from Joni shows, the act of questioning the status quo involved volunteers questioning their own beliefs and experiences. In a dialectical sense, volunteers are part of the status quo, so this personal questioning is an essential part of transforming themselves in order to transform the world. Helpline volunteer Stephanie described this relationship in the focus group: “I wasn’t conscious of being part of the problem but not trying to challenge yourself, never mind other people, but by challenging yourself and what you do and what you consider acceptable you are part of that problem.” In this case, the “problem” to which Stephanie refers relates to the social norms and attitudes toward sexual violence, which perpetuate myths and damaging stigmatizing practices.

The dialogic process of questioning and challenging the status quo, which I observed through the training sessions in each charity, enabled the development of a new perspective on the societal challenge or object of activity for volunteers in each case. For example, the object of sexual violence in CS2 was transformed for volunteers from something “scary” and “embarrassing” (Rebekah, helpline volunteer, interview) to something obtainable: It became “ok to talk about sexual violence properly” (Sophia, helpline volunteer, focus group). In CS3 Greg described realizing that stroke was not “only in the elderly,” but also “young people who have strokes and babies having strokes.” In CS3 volunteers described learning about HIV treatment in training and being confronted with how people living with HIV are “affected by HIV and their commitment to medication and care” (Michael, CS3).

This transformed perspective also transformed the volunteers as they became more confident in pursuing the object beyond the charity. Volunteers took a stance toward the object as they realized their own potential to act on it. This process involved volunteers being able to “imagine what does not yet exist, what they think needs and ought to be created and struggled for” (Stetsenko, 2014, p. 185). Volunteers like Joni addressed contradictions within the volunteering activity through their emotional connection to the object, which motivated them as activist learners (Vianna et al., 2014). For Joni “the realization that these crimes are going to go unpunished” motivated her to work on the object:

Me: I guess that session [on the law] could put you off wanting to be a volunteer in a way?
Joni: It did the opposite for me—I was like, well I definitely need to [volunteer] now! [laughs]

Therefore, the “ideal” aspect of the object (Foot, 2002) was an integral part of how volunteers were transformed as the imagined outcome of their volunteering activity drove them forward. More widely imagining a different outcome to the current status quo was also integral to the charity, as well as the volunteering activity, as was reflected in the vision and aims of each case. These visions
were communicated explicitly to volunteers within the training sessions I observed: CS1 imagined a world where there are fewer strokes and help is available for anyone affected by a stroke; CS2 imagined a world where women who have experienced sexual violence are listened to, believed, and supported; and CS3 imagined a world where people living with HIV lived happy and healthy lives, free from stigma and discrimination. This imagined outcome or driver of social change (Stetsenko, 2014) contributed to the development of the shared object within each charity as volunteers both formulated and instantiated the object of volunteer activity. Through this process, both subject (volunteer) and object (societal issue) were transformed. The role of imagination in “challenging the present and stretching beyond the status quo” (Stetsenko, 2014, p. 185) revealed to volunteers possibilities for their own unique contribution to the object (Vianna & Stetsenko, 2011) or what might be described as conscientização: “the awakening of critical awareness” (Freire, 1974, p. 15) as volunteers began to feel more able to act on the object.

Shared values that make knowledge meaningful

Values relating to the object in each case appeared as both explicit and implicit rules within the volunteering activity and practices of training. Explicitly, the initial volunteer application form checked for shared values to ensure that volunteers were “up for working in the way that we do” (Klara, helpline manager, interview). In addition, volunteers were monitored through the dialogic practices of training to ensure they were demonstrating these values. More implicitly shared values were an assumption for most volunteers who viewed the other subjects within the system as being “in the same boat” (Greg, stroke volunteer, interview), as understanding “the vision” of the charity and their views falling “within that” (Kayla, HIV volunteer, interview), and more generally that “everyone is going to be nice who volunteers there aren’t they?” (Joni, helpline volunteer, interview).

Values did not just “appear,” but were socially and historically developed through practices within the charity and volunteering activities, as well as from external activity systems. For example, in CS3 subjects recognized the damaging effect of stigma for people living with HIV from the 1980s, which continues to be “one of the biggest issues within HIV” (Brett, HIV volunteer, interview). Trainers across all cases placed much importance on the “challenging” of values and beliefs expressed by volunteers that were not shared by the system of the charity. In her interview Kayla described how in a HIV training session the view of one volunteer had come into conflict with the rules and values of the system:

From his opinion the volunteer was immediately positioned as not sharing the collective values of the charity or as Kayla described it “the vision of CS3.” Kayla went on to describe how the trainer “corrected” this view:

In this instance where a subject was positioned outside the values of the charity, it proved to be destructive to the system and led to the volunteer being asked to leave the activity. This example demonstrates that although the object of the volunteering activity was developed through dialogue between subjects, the rules were less open to transformation by volunteers, and from their position in the system there were few opportunities to challenge existing rules or create new ones. Such monitoring and tight regulation of values, although understandable in terms of the causes the charities are addressing, provokes consideration of how far the volunteer activity is reproducing, rather than transforming the system (or the charity) and how this allows for change, particularly in light of the dynamic object of activity. Across all cases for volunteers to be accepted into the
volunteer activity, they had to share the values of the charity, and it was these shared values that drove the activity of volunteering toward the object. Shared values helped to create intersubjectivity that brought volunteers together to work toward the cause of the charity and created a feeling of belonging. For example, the value that volunteers placed on service users motivated them in their volunteering activity and in their desire to engage in organized training:

I like the idea of gaining new skills in order to improve my capabilities of spreading the word about stroke and to become better at it in the hope that it will prevent some strokes occurring. And in the hope it will improve the life of some people who have suffered from stroke. So I want to be better at that and I’ll become involved in any training that will lead to that end. (David, stroke volunteer, focus group)

I don’t want to do it badly. I don’t want to engage in voluntary work—and this is crucial work for women—and do a poor job. So the training is crucial. (Stephanie, helpline volunteer, focus group)

I’m thinking about the service user and not wanting to mess it up really. If you’re really going to engage with somebody who clearly has a need for one-to-one support you need to do that right. (Kayla, HIV volunteer, interview)

A prominent connection between knowledge and values was identified within the cases because knowledge became meaningful to volunteers when it was directed toward both the values of the charity and their own stance toward the object of activity. As Vianna and Stetsenko (2014) argued, it is the activist stance that volunteers take toward these values that positions them as activist learners who can transform themselves and their environment, rather than passive learners merely adapting to their environment. Therefore, learning in this environment is not “value neutral,” as Stetsenko (2014) described, and the culturally and historically developed values, such as the value in CS3 that people living with HIV should be free from stigma, are integral to the activity and practices of volunteering within charities. The view of values being integral to learning supports the aim of education in this context as “not about acquiring knowledge for the sake of knowing, but a project of becoming a certain kind of a person” (Vianna & Stetsenko, 2014, p. 582).

**Social transformation**

**Knowledge as a transformative tool**

As volunteers were transformed through their activity, they felt able to pursue the object beyond the system of the charity as part of wider transformation. This wider transformation mainly took the form of continuing the dialogic practices of the volunteering activity. For example, in her interview Rebekah described feeling able to talk more widely about sexual violence in a way that she felt she could not have done before volunteering:

It’s one of the things Sophia said which is you never talk about it and I feel able to talk about it with other people. Like I told my Mum and Dad about it and I don’t know whether six months ago I would have been able to talk to my Dad about sexual violence! [laughs] But I was able to explain to him and have a conversation about it and I just feel much more like this should be talked about and I’m not going to be embarrassed to mention it or say anything. … The only way this is going to get better is if it’s not this secret shameful thing.

Here Rebekah is describing the dialogic process of volunteers negotiating and formulating the object toward which they are working. Klara also described this dialogic process, which she considered central to training practices of volunteering because bringing the object of sexual violence into awareness for volunteers made them “realize the enormity of it.” Volunteers and staff described this wider transformation as a “ripple effect” (CS1), a “multiple effect,” and “snowballing” (CS2). A particular tool that mediated the subject–object transformation in this environment was personal experiences. For example, in the focus group David described hearing the experiences of both volunteers and service users who had had a stroke as “new knowledge, that’s good diamond knowledge that you can pass on to people and help them understand.” However, if the object was not transformed for volunteers, then subsequently they as subjects were not transformed. Across the cases volunteer trainers described the danger of volunteers getting “stuck” in their own experiences:
[Volunteers] need to have dealt with their own experience and realize that their experience belongs to them. What we see sometimes is people impose that experience on to others and say—I’ve done this, you can do this. Now they need to have dealt with it, they need to know that that’s their experience and that’s really valuable. We can’t replicate that as non-stroke survivors and that’s going to be really valuable in supporting someone, but they have to remember that that’s their experience and that person they’re supporting could have a very different experience. (Gillian, stroke volunteer advisor, interview)

This tension between personal knowledge and experience and organizational objectives highlights the need for what Vianna et al. (2014) described as placing the personal experiences of volunteers in a wider societal context. Opportunities for dialogue and the multiple voices within the system of the charity provided a space for this wider context and thus enabled volunteers to become activists on, rather than passive “undergoers” of, the charity cause (Vianna et al., 2014).

Rather than considering the actions of individuals as being transformative, this study viewed their collectively constructed knowledge as having transformative potential that can be shared beyond the charity. Knowledge as a collaborative process regulated by the rules and values of the system became a tool for volunteers, not only for their own personal development, but also within and beyond the system. For example, in his interview stroke volunteer Noel said, “The knowledge I’ve gained has challenged me to look at what I do, what my wife does, where I can influence gently what my friends do.” In her interview, helpline volunteer Sophia also outlined a situation in which she had been able to provide guidance for a friend who disclosed that someone she knew had been raped.

Thus, the wider transformative potential of this knowledge goes beyond viewing it as a static, fixed entity to be “transferred” from one situation to another. Rather, knowledge became a transformative tool (Vianna & Stetsenko, 2011) as it was performed and enacted (Stetsenko & Arievitch, 2004) in the process of volunteers distributing it beyond the charity. The wider transformation of the volunteering activity was not limited to subjects distributing knowledge beyond the system, but also involved their extending their emotional connection to their volunteering activity, as stroke volunteer Keith described in the focus group: “I mean as volunteers this is our aim if you like, to try and get this passion across to the people we’re talking to.”

**New possibilities and widening of horizons within and beyond the organization**

The dynamism of the object produced a contradiction across all cases between the “need to know” (Nadja, volunteer helpline trainer) through systematic teaching of scientific knowledge through organized training and the requirement to learn “what’s not yet there” (Engeström & Sannino, 2010, p. 2) as “things come up” in the volunteering activity “and you’ve no idea” (Glenn, stroke volunteer, focus group). Referred to as “the gap” by stroke volunteer Noel and helpline volunteer Sophia in their interviews, volunteers addressed this contradiction by participating in a process of ongoing learning. In his interview, stroke volunteer Greg explained how he felt he was “training and learning all the time” in his volunteering activity as he encountered many different aspects of stroke, therefore widening his horizons. This widening of horizons was not just limited to the object of volunteering activity for Greg; it also included other learning opportunities, such as a poetry writing course:

> When it started we all looked at each other and said—poetry, us? You’ve got to be joking! And I love it, I absolutely love it now [laughs] I’ve written quite a few actually, mostly about stroke. . . . Like a couple of us said if I’d been at school and talked about poetry I’d have got battered! [laughs] A couple of the others said the same—talking about poetry, it’s not us! But there’s five or six of us now that stayed doing it. Every couple of months we’ll move into another room and talk about the poetry we’ve done.

Greg’s experience follows the transformative learning process theorized in TAS where new horizons are opened up for personal and social growth (Vianna & Stetsenko, 2011). Across the cases, volunteers described a feeling of freedom to learn, which also expanded their horizons for new possibilities (Engeström & Sannino, 2010):

> Another thing you’ve got to do as a volunteer is that you’ve got to open your mind. You’ve got to be prepared to learn and it’s a great opportunity to learn because it’s not like a job where you’re under pressure.
you’re the manager you’re supposed to know everything. I know nothing, I play dumb all the time—it’s great! You pick up so much more from people. (Noel, stroke volunteer, interview)

Volunteers across all cases were purposefully made a part of the organization, and historically volunteers had played an important role in developing and implementing the work of each charity. Through a TAS perspective the charities had been transformed for volunteers who were also able to have a transformative effect on the system. For example, each charity created new and “bespoke” roles to cater for volunteers entering the system who did not fit in with existing “standard” roles, and certain volunteers across all cases had also moved into the position of trainer. Rather than this process being a vertical progression in this study it was conceptualized as an expansion of horizons (Engeström, Engeström, & Kärkkäinen, 1995) and staff described how they had learned from the experiences and contributions of volunteers:

Some people have a training background so might have a lot of experience around delivering training from their paid work. I’ve learned a lot from working together with volunteers on training actually. I’ve learned from them about styles of delivery and different ways of how to do things. . . . It’s great that actually we benefit from people’s skills who are coming to give time. (Alex, HIV trainer, interview)

Therefore, the system of the charity was transformed as volunteers worked toward the object particularly by moving between multiple positions. For example, in her interview Nadja described how she entered CS2 as a volunteer to participate in the helpline training, but had been supported by the charity to become the main trainer for helpline volunteers. In CS3 Joshua described in his interview how the position of peer mentor volunteers enabled them to share their personal experiences and opinions in a way he, as a staff member, could not: “I cannot talk as a peer mentor because I’m not one, but peer mentors can and they can answer those questions. They can also say things that as staff we’re not technically able to say.”

Possibilities for the charity were also expanded as more experienced volunteers were able to support other volunteers, as Greg described: “Once you’ve built your confidence up and you feel that you can do it then you can help others that are coming in.” These examples show how the unique position of volunteers within the system and the intersubjectivity that coordinated their work on the object created expansive opportunities for the collective activity (Williams, Davis, & Black, 2007). However, contradictions also emerged from the different positions of staff and volunteers. For example, in his interview, stroke volunteer David described a situation where it was “other people’s decisions whether you are invited to [training] courses and they are often by invitation as opposed to a personal choice.” He went on to describe occasions where he was told “you are not in a position to need to know” certain information, such as organizational structure or strategies: “They wouldn’t tell you because it’s not for volunteers, it’s for staff only.”

Summary

In this study, TAS has proved to be a useful perspective to further understanding of how people learn about and address complex societal challenges by conceptualizing this learning process as transformational, both on an individual and collective level. The charity and voluntary environment is a fruitful context for exploring certain aspects of the theory such as values, imagination, and emotion and has highlighted both the affordances and constraints for transformative learning experiences. These findings and the contribution to theoretical advancement are further discussed in the following section.

Conclusions

This study explored how people learn about complex societal challenges within the charity and voluntary environment and drew upon TAS to conceptualize this learning as a process of transformation. Findings identified moments of personal and social transformation as volunteers described
qualitative changes within themselves and, to a certain extent, the charity and their wider communities in relation to their activity. This transformation took the form of a widening of horizons and new possibilities, such as Greg’s newfound passion for poetry. In this process the emotions and imagination of volunteers played a central mediating role and personal experiences and knowledge became transformative tools.

The socially and historically developed shared values and rules of the system of each charity enabled volunteers to use these tools to spread awareness beyond the volunteering activity resulting in wider transformation. However, this study showed that if shared values could not be created within the volunteering activity, there was destruction within the system, as was shown by the HIV volunteer who did not share the values and “vision” of the charity and was asked to leave. Sharing the values of the charity is important for anyone entering into the organization, including staff and volunteers, as it is these shared values that drive the activity of volunteering forward. For volunteers the sharing of these values is the main way in which they are accepted and made a part of the organization, from within which they can work toward the shared object and their own activist projects (Stetsenko, 2012). For example, the value that volunteers across all cases placed on service users motivated them to engage in training practices. Values within charities can become both a cultural tool and a rule to the activity of volunteering, which emphasizes the integral position of values within the activity and offers an example of how volunteers can enact agency over their learning. Therefore, as theorized in TAS, values are an integral aspect of learning in this environment, and rules regulating volunteering activity both protect these values and become mediating tools for volunteers. Furthermore, operationalizing the CHAT-informed concept of values in this context intends to contribute a clearer definition of this term within TAS.

Conceptualizing the process of learning as a form of transformation was particularly useful in this study to understand learning in the charity and voluntary environment, where challenging societal issues are learned about and addressed. The physical, social, and psychological impact of stroke, sexual violence, and living with HIV are issues that are dynamic and do not necessarily have a set “answer,” meaning that volunteers have to learn “what is not yet there” (Engeström & Sannino, 2010, p. 2) and imagine “what does not yet exist” (Stetsenko, 2014, p. 185). This environment enables a process of ongoing, continuous learning, which addresses the contradiction of the need to “know” and being taught certain knowledge and the perceived impossibility of feeling prepared for the volunteer role. The dialogic process of questioning and challenging existing practices, which is already viewed as central to the activity of charities, was conceptualized as being an integral part of this transformative process. Across all cases the questioning of the status quo involved volunteers questioning their own beliefs and experiences when they experienced contradictions between these and their new perspective of the charity cause. Exploring this kind of personal questioning, so far underexplored in TAS, provides a useful insight into how knowledge can be made meaningful to learners in accordance with their values and enable them to develop an activist stance (Stetsenko, 2012).

As previously recognized in TAS (Vianna & Stetsenko, 2011), my findings do not necessarily show personal transformation bringing about long-lasting social change, involving structural and systemic issues (e.g., the law and judicial system relating to rape). However, awareness raising in the form of extending dialogue on the object or charity cause beyond the volunteering activity was an integral part of both personal transformation for volunteers and transformation within and beyond the charities and can be seen as an important and perhaps initial contributing factor for wider social change. Further longitudinal studies are needed to explore the opportunities for social change and collective transformation within this context in more detail.

As was outlined at the beginning of this article, transformation within this theoretical perspective does not aim to describe a process of change from one static state to another. Rather, transformation encompasses a continuous, ongoing process of becoming human (Stetsenko, 2012) in which people actively transform the world through collaborative activity and shared values and in the process transform themselves (Stetsenko, 2014). The charity is therefore conceptualized as a “collective
instrument” (Engeström, 1991) through which volunteers perform and enact knowledge. This knowledge, which is imbued with the values of the charity, then becomes a transformative tool used in working toward the activist pursuits of volunteers within and beyond the charity (Vianna & Stetsenko, 2011). Furthermore, the unique position of volunteers within the charity and their multiple voices and historicity, along with the possible contradictions emerging from the division of labor in the system, contribute to the transformation of both subject (volunteers) and object (the cause they work toward within the charity). By focusing on an environment that has so far been underexplored in TAS, these findings make an original and significant theoretical contribution to conceptualizing learning as a transformational process.

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