

# Why measure and for whose benefit?

Addressing the challenges of measuring the contribution of volunteering for development in a multiple stakeholder environment.

# Contents

Foreword.....	3
About Forum .....	3
Abstract .....	4
Terminology .....	5
Context.....	6
Doing the easy stuff – do we really need to measure that much at all? .....	8
Measuring what we can.....	10
Measuring to compete on others’ terms? .....	13
Can we measure distinctiveness?.....	16
Measurement and the Sustainable Development Goals (SDGs).....	18
Conclusion and policy implications for Forum .....	26
Acknowledgements.....	29
References.....	30

## Foreword

This is the seventeenth in a series of discussion papers produced by the International Forum for Volunteering in Development (Forum), which follows on from our research work on trends in international volunteering and cooperation in recent years.

This paper aims to explore the different drivers that international volunteering and volunteering for development organisations face in addressing how the contribution of volunteers is understood and measured. It considers this in the context of the historical changes in international volunteering for development, locating different approaches to measurement to the interface of stakeholder expectations and changes in the narrative on aid and development.

The views expressed in this paper are not necessarily those of Forum or its members, or of the organisation for which the author works. The responsibility for these views rests with the author alone.



**Chris Eaton**

Chair of Forum

## About Forum



The International Forum for Volunteering in Development (Forum) is the most significant global network of international volunteer cooperation organisations (IVCO). Forum exists to share information, develop good practice and enhance cooperation across the international volunteering and development sectors. It promotes the value of volunteering for development through policy engagement, mutual learning and by sharing innovative and good practices. Forum is a 'virtual' network, with a global membership that includes a range of organisations involved in international development, including non-government and state organisations.



# Abstract

This paper aims to explore the different drivers that international volunteering and volunteering for development (V4D) organisations face in addressing how the contribution of volunteers is understood and measured. It considers this in the context of the historical changes in international volunteering for development, locating different approaches to measurement to the interface of stakeholder expectations and changes in the narrative on aid and development.

The paper draws upon the contributions made not only within the academic literature, but also in the area of crossover between academics and practitioners, such as the papers produced through the International Forum for Volunteering in Development (Forum). It traces the pathway of major international volunteering for development organisations from focusing on how inputs were a significant measurement criterion to the impact on volunteers and the engagement with ‘classic’ development outcomes. It considers approaches to measuring the distinctive contribution (e.g. the social capital model)<sup>1</sup> and recent work on valuing volunteering<sup>2</sup>, addressing the impact on returned volunteers as social activists<sup>3</sup>, pursuing their ‘in placement’ contribution<sup>4</sup>, leading to the SDGs post-2015 engagement about both the role and contribution of volunteering for development<sup>5</sup>.

The approach is based on the use of secondary sources and is not intended to engage in any new primary field research. It draws on the author’s direct experience of more than twenty years as a practitioner in international volunteering. It uses a case study approach to illustrate and support the propositions in the paper.

The central argument of the paper is that the focus of measurement has shifted over time, with a differential emphasis on the balance between inputs, outputs and outcomes. Since organisations sit within a complex framework of accountability – donors, volunteers, host communities and governments, and their own governance – there are significant implications concerning what is measured, for what purpose and for whose benefit.

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1 Development Initiatives (2004).

2 Burns and Howard (2015).

3 Allum (2008).

4 Lough and Matthews (2013).

5 Haddock and Devereux (2015).

The paper concludes by setting out future priorities for international volunteering organisations and concludes that an effective interface between academic research and practitioners is vital to the development of a body of knowledge on understanding and measuring the contribution of international volunteering.

## Terminology

In this paper, there is the use of a number of different terms, which in the operational world of the V4D sector are not necessarily used in a consistent way. This is not simply a technical question but a political one. The term *international volunteering* reflects both the source of volunteers and where they are placed (outside of their home country) but not the content or even objectives of what volunteers do, although many programs are 'development' focused. Many international volunteer cooperation organisations (IVCOs) may be specialists in this area. *Volunteering for development* (V4D) is a broader category, including national as well as international volunteers; yet it has a potentially narrower focus on *development and peace* in terms of content.

IVCOs may operate with both national and international volunteers as part of their programs, either separately or combined. In this paper, different terminology is used in alignment with different historical moments, but it may not always be consistent and may also be a simplification on occasions. This is a reflection of how the objectives of IVCOs using essentially the same or similar forms of intervention may change over time or are multi-layered.

## Context

The relative importance of measurement in respect of volunteering for development is arguably a reflection of both dominant and countercultural models of volunteering. There is a diversity of interests: those of the institutions, organisations and individuals who resource volunteering activity; those who undertake volunteering; the mediating agencies who send the volunteer; and the host organisations and communities that receive volunteers<sup>6</sup>. The issue of why and what is measured – and indeed how effectively it can be measured – is related to those diverse interests, which may contradict each other at any moment in time, and indeed may change over time.

In this context, the measurement of inputs appears a far easier prospect than outputs or outcomes. It has been far easier to count the number of volunteers who undertake volunteering for development – at least at the formal level – than to measure what contribution volunteers have made. Related to this is whether there is any interest in measuring volunteering in any other way. For example, if the objective of the institutional agency is primarily in seeing a given number of volunteers in place, then providing the volunteer, the sending agency (if not the institution) and host partner and community are 'content', then measurement can remain at the input level.

On the other hand, if, for example, the institutional donor decides that just counting numbers of volunteers is not sufficient, this can change the whole system dynamic; or if the host organisation requirements of volunteers changes from large-scale inputs to specialised expertise, this impacts on the capacity to deliver volunteers at scale; indeed, any changes in the balance of the key actors may do this.

Changes in the views of host communities as to what they require could prove significant; changes in volunteer expectations may not align with the priorities of other organisations; changes in the mission and values of sending organisations would make connections more or less easy with volunteers and host partners. IVCOs have mediated that space between donor, volunteer and community expectations as to what V4D will deliver, and have both shaped and responded to differential demands for measurement.

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<sup>6</sup> It is an interesting question as to whether local partners and communities 'request' volunteers or 'receive' them. Volunteer programs can be demand led but they are also supply led, where essentially the 'request' comes from the sending agency asking the local partner to take volunteers. The term 'receive' is intended to cover both supply and demand led situations.

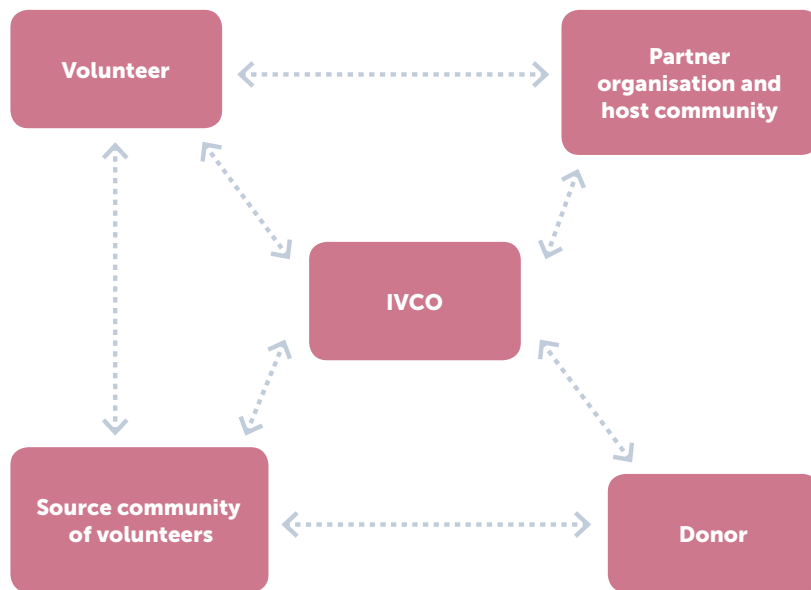


Figure 1: Key stakeholder relationships in the international V4D model

Figure 1 shows a simplified model of those relationships. It will vary from one situation to another, but in the traditional model, the mediating role of the IVCO is important to note. It is the only organisation that will have relationships with all other key stakeholders. Being able to demonstrate the contribution that V4D makes is a critical success factor, but different stakeholders may well have different concepts and different rationales that need to be accommodated.

## Doing the easy stuff – do we really need to measure that much at all?

The context of V4D – better termed North-South international volunteering in its emergent phase of the 1960s – is one of post-war reconstruction, both economically and politically. This took various forms at the level of multi-lateral interventions, nation state interventions and what is now termed civil society. The particular process of the changing balance of colonial influence combined with emerging nationalism and independence movements across Africa and Asia had been set rolling by the end of the Second World War and arguably concluded in this phase in Africa and Asia with the end of the apartheid regime in South Africa in the early 1990s.<sup>7</sup> It is not coincidence that this period was also an era of East-West conflict in the form of the Cold War, which in part was fought out through various means in Africa, Asia and Central and South America.

The confidence of the West in this area arguably drew upon theories of capitalism which, in the wake of burgeoning prosperity in the USA, Northern Europe and a resurgent Japan, appeared to contain the essential solution to poverty elsewhere. Alongside the economic model, the Cold War era emphasised the importance of foreign policy – dramatically in some cases – resulting in a developing rivalry in political and economic influence across a range of geographical areas between the West and the communist world.

The international volunteers sat somewhere in the midst of this. The economic was essentially about skills, the politically softer edge of what the Global North (both capitalist and communist) could offer the emerging nations of the Global South. In an era of solidarity movements, volunteer agencies may have ostensibly recruited on the basis of skills, but volunteer motivations were an essential ingredient.<sup>8</sup> The economic and political came together in the form of large-scale programs of service delivery – typically teachers and health workers, but also engineers and planners.

Measurement of service delivery at this point was not a problem that needed sophisticated understanding. It was assumed that bringing teachers and health

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7 The demise of left-leaning governments and movements in Central America was in some cases followed by the expansion of the US Peace Corps program, e.g. in Nicaragua. The unravelling of colonial history in the former USSR and Middle East is outside the scope of this paper.

8 Some examples would have been CIIR in Central America and IVS in southern Africa. IVS sent volunteers with skills to Mozambique in the 1980s, but their political sympathies would need to have been with the Frelimo revolution. See Judge (2004) for an account of the unspoken political life of international volunteers.



workers to countries where they did not have them in sufficient scale would inevitably be better than not having them at all. Building capacity to train local people would take time to go to scale. A counterpart model was favoured in many situations as a means of mutual sharing of skills and promoting the values of the sending country, but this was a long-term strategy. Combining large-scale delivery with skill transfer was not seen as a clear way forward and volunteers presented a cost-effective model for delivery.

It is not surprising in such a context that inputs were at the forefront of measurement, since achievement could be assumed. The number of international volunteers (IVs) sent would be a reasonable proxy of both economic and political objectives. This was an era where ensuring the supply and engagement of people who would volunteer was important – having a role was not such a problem since the perspective drew on the notion there was much to do.

In the 1980s and 1990s, we can see trends that impact on this focus on inputs. Firstly, there is the growth of locally generated professional staff as Indigenous teachers and health workers are developed in the emerging post-colonial countries. The need for large-scale inputs is no longer evidenced on a widespread basis, but quality begins to emerge as an issue. The requirements of the governments and communities become more sophisticated. In this context, there is the movement by IVCOs from service delivery/counterpart models to ones that are focused on capacity building local organisations and local capacity. This essentially demands a more sophisticated model of measurement as well as delivery.

Secondly, we can see a recognition by donors that the models of large-scale skill-based interventions are not generating the economic success that might have been expected. The 1960s model of unproblematic economic growth becomes less predominant as economies in the Global North stall and stagnate, while the anticipated success in Africa, South Asia and South and Central America is not realised. The assumptions underpinning the contemporary V4D model start to unravel. This implies the need to redefine the role of V4D and opens up the challenge of measuring more closely the contribution of volunteers.

Thirdly, the end of the Soviet Union and Cold War impacts on the balance of the battle for post-colonial influence across Asia, Africa and South and Central America. This impacts on the significance of the role of the international volunteer as a promoter of their home country.<sup>9</sup>

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9 See Lough and Allum (2011) for case studies on the changing patterns of state funding and the changing rationales for doing so.

Taken together, this starts to demand a sharper focus on the specific nature of the input and clarity on what difference the V4D input makes. In the wider context of what difference any development contribution makes, and a recognition that NGOs may not make up for the deficiencies in state-based interventions, the focus on contribution develops. This also seems in some western economies to be part of a focus on 'value for money' and a detailed driving down into the value of public expenditure generally. For whose benefit do we have international volunteers?

## Measuring what we can

Amongst volunteer sending agencies, this generates an era of repositioning which can be tracked to the 1990s in some form or other. Terminology becomes a sensitive issue as some agencies move towards consultancy, others reaffirm the high level skills of their development workers, while others retain the volunteer as the central focus of their work. By the turn of the century, the process of radical change in the international volunteer model is underway.<sup>10</sup>

The pressure to more clearly define the contribution of IV/V4D is coming from various directions. Governments, either as donors or as deliverers of development programs, are striving to demonstrate development outputs and outcomes and the new Millennium Development Goals (MDGs) provide, somewhat unevenly, a focus for this. Volunteer agencies – governmental and non-governmental – are being pressed to define their contribution and/or impact. Typically, this turns in different directions: on the volunteers; on partner organisations and communities during placement; and on what happens when volunteers return home.

Measurement has often focused on the volunteer experience. Put simply, for volunteer agencies to be able to recruit people onto their programs, demonstrating the positive aspects of the experience was important. For example, understanding the profile of potential volunteers (e.g. age, sex, educational background, marital status) was a precondition of defining how to promote the program. Demonstrating the 'life-changing' nature of V4D alongside, e.g. reassurance that employers would take a positive view of that experience, provided a focus not just to convince people to volunteer but also set out what might be measured.

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<sup>10</sup> See Allum (2007). In 1999, the European network for IVCOs, Forum, commissioned two papers on the future of international volunteering in the context of challenging discussions over the meaning and purpose of V4D, with agencies pulling in different directions. This led rapidly to the restructuring of Forum as a global network and the establishment of the IVCO annual conference. The rationale for V4D and the issue of contribution were immediate areas of focus.

What happened to volunteers after they had completed their assignment was important in informing how and where to recruit and to generally promoting the volunteering experience.<sup>11</sup>

Going beyond that starts to open the classic question of whether volunteers believe they have made a difference. While the answer is consistently 'yes', it is very often the case that volunteers recognise they have learnt more to influence their own life paths than they have contributed during their time as a volunteer. This anecdotal storytelling has traditionally had very strong currency.

*Anecdotally, we all know that (good) volunteer experiences can and often do influence the choices that former volunteers make later in their lives. (Christie, 2007)<sup>12</sup>*

Moving beyond the anecdotal that volunteering experience is valuable poses the question of what do we want to measure? One interesting case study is that of the experience in Canada, where international volunteering traditionally has been delivered by NGOs, with a significant element of state funding. Tracking the Canadian volunteer agency history between 1999 and 2007 is essentially a pattern of the agencies justifying the value of international volunteers when they returned to Canada, as the relevant government department, CIDA, sought to identify that contribution. CIDA commissioned a review in 2005, which concluded how:

*The "overseas experience" had a "profound impact on the values and beliefs of returned volunteers, as well as on their skill levels, the career and education decisions they have made on their return, and their involvement and support to local community or international development." (Jackson, 2005)*

Other studies also exist of what impact volunteers make on return, which tend to show they are more active in voluntary roles and therefore more active as 'citizens' in their home communities.<sup>13</sup> This is not methodologically difficult, since they tend to rely on sample surveys of volunteers – questionnaires – plus

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11 See for example Skillshare International Development Worker Research Report 1978-1998, published by Skillshare International (1998). "We now have a clearer picture of what kind of people become development workers, what work they will do when they are placed and what will happen to those who return."

12 The anecdotal has a more collective equivalent, which is highly visible in some cases: the US political system is full of former Peace Corps volunteers in both main parties.

13 See for example Sherraden et al. (2008) and Machin (2008) as contemporary pieces with the Canadian work.

interview follow-up.<sup>14</sup> Nevertheless, these approaches showed correlation but not cause and effect. Put simply, would international volunteers have followed a similar trajectory in any case?<sup>15</sup>

A further study of Canadian returned volunteers attempted to address this question. Kelly and Case (2007) refined the model used in the CIDA-commissioned study, using 1,150 former CUSO volunteers, gaining a significant 647 responses and holding 40 interviews. They also standardised their sample against the regular profile of CUSO volunteers, allowing for when people undertook their volunteering and which parts of Canada they came from. They produced a number of interesting findings, but one essential point – that Canadians who volunteer abroad tend to be active volunteers on return to Canada, are more likely to volunteer than Canadians as a whole and contribute more hours as volunteers.<sup>16</sup>

This kind of methodology, which attempts to address the change in perception or behaviour of volunteers, has been an attractive way of demonstrating the contribution of volunteers. This leads into the issue of who benefits from V4D and what has been studied. This tends to be about changes in the volunteers and how they might benefit, echoing the historic institutional recruitment needs of IVCOs. As Buckles and Chevalier (2012) noted:

*The few studies that have been done focus primarily on the benefits of volunteering for the volunteers not the consequences of volunteering for other stakeholders.*<sup>17</sup>

However, researching what happens to volunteers is arguably not the mainstream area of interest to at least two key stakeholders: donors and host partner communities. That takes us to what has become the holy grail of the contribution of volunteers: what is achieved during placement and how it can be measured.

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14 Jackson et al. (2005) sampled 500 returned volunteers followed by 10% interviews.

15 Some research on the Australian Volunteers International (AVI) program suggests this is likely. See Fidler (1997).

16 Kelly and Case (2007). This is discussed in Allum (2008).

17 See for example Tiessen and Heron (2012) and McBride et al. (2010).

## Measuring to compete on others' terms?

Organisations concerned with volunteering as a form of development activity are likely to have a desire to understand and measure what they are achieving, within the constraints of their resources. Indeed, the earlier history of interventions has been in part characterised by the principle of 'do no harm', which recognises that whatever the experiential value to the volunteer, there is no automatic positive outcome from V4D interventions.<sup>18</sup>

However, the increasing focus on development outcomes and ultimately impact, partly arising either directly or indirectly from the focus on MDGs, became connected to greater demands on reporting requirements in terms of contribution. This was also combined with an era of tightening public sector funding alongside value for money policies. These factors all combined to focus increased attention on what difference V4D makes in terms of development outcomes.

From the early years of this century, the global network for international volunteering agencies, Forum, found members simultaneously concerned about funding on the one hand and their ability to demonstrate impact on the other. There was a recognition that the tools were not really available and that volunteer agencies did little in this area. UNV, prompted in part by the pressure to demonstrate contribution to the United Nations MDGs, led a major action research project, including six international volunteer agencies who were members of Forum, to pilot and develop tools that would enable a better understanding of the impact (or contribution) of V4D. The outcome was a comprehensive pack of exercises and tools to assess the contribution of volunteering to development, published by UNV five years after the pilot.<sup>19</sup>

This model set out a logical framework for volunteering for development, running from the top level of 'Goal' down to 'Purpose', 'Outcomes', 'Outputs' to 'Activities'. It included a table of expected changes in key stakeholders and set out exercises and tools to be used to assess at placement and program levels. The methodology was largely participative, essentially using stakeholder views as the building blocks for

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<sup>18</sup> This principled position has been arguably challenged and in some cases undermined by the blatant supply-driven North-South youth programs in recent years. This includes both the commercial developments of volunteer experience and the voluntourism expansion, but also state-funded programs. See Allum (2012) for a fuller discussion.

<sup>19</sup> UNV (2011). The use of the terms 'impact' and 'contribution' reflect the nuances of the debate around what was possible to be demonstrated and the management of expectation.



making an assessment.<sup>20</sup> The caveats were important:

*Although the logical framework includes several levels up to impact, this methodology is NOT intended to measure the impact of volunteering. This would be inappropriate, as in general the work of volunteers is not enough to generate impact on its own. Rather, we look at how volunteering contributes to short and long-term development goals. (UNV, 2011, p.10)*

At the same time, looking towards the potential contribution to the MDGs, the aspiration is suitably modest:

*The purpose of including the MDGs in the assessment methodology is to enable volunteers and partners to look in general terms at how they make a contribution in the wider context of international development targets. This is not about trying to attribute changes to individual volunteers, projects or programmes, but attempting to look at the cumulative contribution of volunteering within the broader context of ongoing development processes. (ibid, p.17)*

This major piece of work had ultimately acknowledged that the challenges of attribution and scale were bridges too far at that stage. But importantly, it acknowledged that the standards set mitigated against what could be demonstrated in terms of V4D, indicating that the MDGs were “very much based on quantitative rather than qualitative data.” (ibid, p.17).

The methodological reliance on participatory exercises, seeking some level of demonstration of contribution based on what people said, could be extended to partner organisations. This was relatively unexplored. This might seem surprising, since the methodology could have been applied to partner organisations and communities: in what ways do partner organisations and communities believe the volunteer has been able to make an effective contribution?

The UNV research project, combined with Forum’s interest in developing discussion papers on key topics, demonstrated the potential of multi-agency collaboration and coincided with the emergence of a new wave of academic interest. Individual interests in international volunteering research had always been a feature, though often rare

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<sup>20</sup> It should be noted that at ISTR 2008, a shared panel of academics and practitioners focused on international volunteering, included a presentation by Caspar Merkle who led this research in its original form in UNV. See Merkle (2008).

at an academic level. Peter Devereux was drawing on his own and other agencies' experiences to produce a doctorate thesis and was one of a team of research fellows supported by the Global Service Initiative at the University of Washington in St Louis, led by Margaret Sherraden and Amanda Moore McBride. The Center for Social Development at the University of Washington produced a series of papers from around 2007 on international volunteering, including measurement; elsewhere, the work of social geographers was focused on international volunteering; and individual Forum members were bringing to light the work of academic institutions and research bodies in their own countries. The desire on the part of IVCOs to demonstrate contribution began to drive a connection between practitioners and what appeared to be a less connected world of individually inspired academics in this field of research.<sup>21</sup>

In late 2008, in the aftermath of the field research on the UNV project and a joint presentation of academics and practitioners at ISTR, Forum decided to form a Research Working Group, bringing together interested members and interested academics. This group was not initially focused on academic research but on evidence-based discussion papers, except in one area: impact. A research proposal was developed that focused on the contribution that V4D made to partner organisations and communities. Ben Lough was commissioned to undertake the work.

The outcome was an important study of V4D in Kenya, facilitated by Forum members, using interviews and focus groups to work with volunteers, program staff and beneficiaries.<sup>22</sup> The work with community members was based on participatory workshops and short surveys. The outcomes of the pilot were potentially challenging. From the community perspective, short-term volunteering was seen as less beneficial than long-term volunteering; while cited as a strong benefit of volunteers to local partners and communities were the resources IVs brought with them and the prestige of certain skin colours.

This was sufficient to raise up the agenda the potential of developing a greater knowledge of what communities and organisations who received volunteers really

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21 There starts a process of interesting crossovers between researchers and practitioners. At ISTR 2008, a panel of two academics and two practitioners was brought together by Peter Devereux. He later joined UNV and the Forum Research Working Group before returning to academia. Another member of the panel was Dr Ben Lough, part of the research team at the University of Washington in St Louis led by Margaret Sherraden, who joined the Forum research group and later worked for UNV on the State of the World's Volunteerism Report. Although Forum and its members have attempted to engage research from the Global South, this connection has been harder to develop. The link with VOSESA, now sadly no longer with us, was perhaps the most significant.

22 See Lough (2012), and Lough and Matthews (2013). The earlier version is the initial draft findings.

thought, revealing perhaps that in the midst of donor priorities, volunteer aspirations and organisational priorities, the 'Southern voice' was not really being heard as well as it might. This cooperation has led to a larger scale piece of work, which it is intended to scale up again in the future.<sup>23</sup>

On the terrain of the MDGs, demonstrating the contribution of V4D was difficult and ultimately unattainable. The setting of the MDGs had not effectively considered the mechanisms that would deliver the MDGs, which inevitably were driven by the policies of the governments of the Global North. V4D had no seat at *that* table at that time.

While this period had seen the development of new tools, the leap from the intervention of an individual volunteer to demonstrate impact at scale on key areas of health and education was too great and not competitive with the apparent plausibility of the well-scripted development project focused on tangible outcomes. IVCOs were trying to utilise the models of development measurement and reporting which had not been designed to demonstrate the contribution of volunteering. They were struggling to demonstrate a contribution to classic development outcomes, while the tools did not easily demonstrate the significance of the volunteer contribution.

## Can we measure distinctiveness?

But there was also another path that had been pursued. This focused on measuring what made V4D *distinctive*. This was really an attempt to explore the essential nature of the volunteer relationship; how this would shape and engage with communities in ways other forms of interventions would not be able to do. This was part of the received ideology of international volunteering: that somehow the relationship between international volunteers and host communities generated something different from the more conventional, commercially driven programs.<sup>24</sup> This could be found in the quality of relationships, underpinned by different motivations and a shared sense in different ways of what can be termed comradery.

In 2004, Forum commissioned Development Initiatives – a well-renowned consultancy in the development rather than volunteering field – to consider the

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<sup>23</sup> This remains an important area on which research is currently being focused. Forum is currently supporting SSHRC-funded research on the perspectives and experiences of partner organisations by Ben Lough and Rebecca Tiessen.

<sup>24</sup> See Devereux (2008) for a discussion of this aspect of international volunteering. But especially note the request from what would now be termed the Global South for people to come who engaged in the 'whole life of society' and not just knowledge exchange.

added value of international volunteering and specifically to explore the potential of social capital as a way of understanding it. The Development Initiatives research indeed concluded that social capital could be a very useful concept in understanding this distinctive contribution, taking it beyond anecdote and ideology.

*If a social capital framework is applied to a lot of volunteer activity, it becomes clear that many of the broad benefits volunteers bring – networking, a people-centred approach, partnership, a motivation beyond money, an openness to exchange of ideas and information – are ‘not just warm cuddly feelings.’ Rather they are key elements of social capital – which is ‘widely recognised as having the potential to sustain and renovate economic and political institutions.’<sup>25</sup>*

However, this area of research did not progress as hoped. Forum did not have the funding to commission a larger project and the orientation to ‘classic’ development outcomes took centre stage. However, it did foster a strand of review that explored the distinctiveness of volunteering in different cultures and contexts and that thread did continue as a perspective in the more mainstream work. Explorations as to whether there were distinct, culturally defined models of volunteering was one such focus.

The establishment of the fieldwork again explicitly sought the cooperation of other Forum members, although the final work tended to rely heavily on VSO volunteers. The outcome was a clear statement of the distinctive value of volunteering based on the significance of relationships. In some sense, it rehabilitated the earlier models of the importance of community solidarity and relationships as the critical and distinctive contribution of V4D, rather than the technical transfer of skills.<sup>26</sup>

Alternative thinking from another place also challenged some of the established orthodoxy. In 2012, Buckles and Chevalier brilliantly challenged the World Bank model of proof, the control group model, which could never really be applied to

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<sup>25</sup> Development Initiatives (2004), p.13.

<sup>26</sup> For academic discourse, see IDS Bulletin Vol 46 No 5 September 2015, which is dedicated to this.

V4D (except in terms of the volunteers who were sent out). Their argument was based on the reasonableness in other arenas of the balance of probability as being sufficient evidence for validity.

*We suggest that to assess impact in complex settings, methods need to bring together the processes of fact-finding and the construction of meaning in complex settings currently separated in mainstream methodologies.<sup>27</sup>*

## Measurement and the Sustainable Development Goals (SDGs)

The current debates about measurement are not primarily focused on whether V4D contributes to the benefit of the volunteer except insofar as it results in some form of attitude and behaviour change, e.g. active citizenship. Superficially, this is not the prime purpose of targets such as the MDGs or the Sustainable Development Goals (SDGs). These mainly focus on 'classic' development outcomes, which are essentially the agenda of donor governments, despite efforts to widen the constituency. Civil society has attempted to influence the nature of those goals, and indeed some international development NGOs, who can be seen as part of the development system, are relatively comfortable with the global goals; others, for example those who have seen the importance of the volunteering for development tradition, have fought to gain a foothold in this model and face challenges as to how to use forms of measurement which connect their activity to the global goal indicators.<sup>28</sup>

However, the knowledge base that had developed during the time of the MDGs was brought to bear on the emergent SDGs. Given that experience, it was important to make every effort to ensure that V4D had a level of recognition as a key mechanism for the SDGs to be achieved and that the SDGs themselves were developed and defined in such a way that enabled qualitative approaches to be valid.

The process and orientation gave a significant push for reorientation: the SDGs apply to everyone, not just developing countries; greater engagement with civil society enabled a stronger focus on process; while the SDGs themselves allowed space for 'classic' development outcomes alongside the subtleties of SDGs 15-17.

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<sup>27</sup> Buckles and Chevalier (2012), p.4.

<sup>28</sup> See Haddock and Devereux (2015).



V4D became more visible as a desired and appropriate route to achieve the SDGs in comparison with the MDGs process. However, the issue of measurement remains a challenge, not least because the SDGs KPI processes are more driven by statistical influence and the drive for aggregation. Models to address the challenges of measurement featured in the innovative paper developed by Haddock and Devereux (2015), which inspired IVCOs to look at the crosswalk model amongst others. But these are early stages. IVCOs are still primarily pressured by models of upward accountability to deliver to donor or departmental demands on development outcomes and the problem of measuring how the contribution of an individual volunteer can be aggregated alongside the contribution of other volunteers. Attribution remains a clear challenge; and where it is demonstrable, such as in the *Valuing Volunteering* work, how does this engage with the dominant paradigm on aid effectiveness?

***A case study of the UK – variations in donor requirements for measurement***

*The historical model in the United Kingdom focused on the state funding of four NGOs to deliver long-term international volunteering. This model was developed in the early 1960s and for most of the next forty years was run under the control of the Foreign Office, with the department dealing with overseas development a small subsidiary. In this context, the UK government played a coordinating role of the British Volunteer Programme, with a strong focus on how the international volunteering program was distributed to different countries, avoiding duplication by agencies and operating to ensure the numbers of volunteers was at an 'acceptable' level.*

*Measurement was largely about the number of volunteers and where they were located. Reporting required a statement of what had been achieved, but this was minimal and not significantly or directly connected to the provision of further funding. The agreement was nominally renewed annually and despite later changes in mechanisms, such as the Programme Partnership Agreements, the same agencies that had been funded to deliver the international volunteering program remained largely unchanged during this whole period until 2011.*

*The movement away from the British Volunteer Programme to*

*one of a looser relationship between the state and the agencies did not change the centrality of a relationship-based model. The volunteer agencies were seen as allies of the government department and the system operated on a level of mutual trust that the activity of the volunteers was worthwhile. Such a model of shared values meant that the measurement of inputs was the prime focus and that matters could be addressed through discussion to enable alignment of objectives. The presence of UK volunteers could demonstrate the tangible contribution of the UK government in developing countries, a 'soft power' objective as much as a development one.<sup>29</sup>*

*This informal and somewhat cosy relationship would be affected by major external factors. Against the background of the end of the Cold War and change in the ways of securing influence in the Global South, specific factors in the late 1990s came into play. There was the election in 1997 of a new UK government committed to an independent Department for International Development, which rapidly saw the separation from the Foreign Office and a more radical view of the use of development aid. As the UK government's Foreign Office influence became less financially sustainable with refocused political objectives, the application of a value for money focus on international work was also being implemented. On the wider international arena, there was the emergence of a new global agenda in the form of the Millennium Development Goals (MDGs), which brought sharply into question what development aid was trying to achieve.*

*These developments shifted the focus away from inputs to outputs, outcomes and impact. This was soon reflected in the donor funding models, replacing what was essentially an input-measured system with one that focused on both inputs and outputs, renaming what had been a grant to international volunteering agencies with a Programme Partnership Agreement (PPA).<sup>30</sup> Instead of an assumed benefit from international volunteering, this now needed to be demonstrated through the use of the much-favoured DfID tool of a logframe.*

<sup>29</sup> See Lough and Allum (2011) for a more complete exposition of this issue.

<sup>30</sup> This placed the international volunteer agencies into the same funding component as other NGOs, which was a new and ultimately far-reaching departure.

*This posed sharp issues for the international volunteer agencies since there was a growing expectation to demonstrate the contribution of international volunteers, which could be achieved at a case study level but with great difficulty at an aggregate level. Also, international volunteer programs were used in countries that may have been Foreign Office priorities but not necessarily, as it emerged, DfID priorities. The pressure was to be more focused in the work and deliver better development outcomes.*

*While reporting requirements grew, funding allocations seemed to remain largely unconnected to the outputs of the activities. This reflected the historical roots of the volunteer agencies to utilise the relationship model with DfID. Alongside a struggle to demonstrate development outcomes, resource allocation from the UK government was sustained and ostensibly resourced at an historically high level.*

*However, the new government that came into power in 2010 was unconvinced about the utility of strategic grant allocation. The international volunteer agencies were unable to deliver a viable model for demonstrating development outcomes. The historic assumption that it was common sense that volunteers did things of value, and were more cost effective than technical and professional experts, had been effectively marginalised by locking in the international volunteer agencies alongside other NGOs and assessing them in comparison. Funding for all four international volunteer agencies was dramatically cut.<sup>31</sup>*

*Paradoxically, in an era where DfID policy would set the long-term international volunteering program into terminal decline because it could not demonstrate an effective contribution to development in comparison to the work of other UK NGOs, their focus now seemed to take us 'back to the future'. DfID now shifted onto a new youth program characterised by a short-term opportunity for a diverse group of UK youth under the banner of International*

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<sup>31</sup> The historic DfID funding models for UK-based INGOs had separated the block grant receivers from the competitive pool, both of which were separate to the volunteering budget line. The PPA model brought the block grant and volunteer agencies into the new strategic grant arrangements known as PPAs. Some years later, by 2010, the international volunteer agencies were simply classified as NGOs. DfID did not have a lead staff member on international volunteering, which had become subsumed within the civil society department.

*Citizen Service (ICS). This soon developed into a contract, funded entirely on the basis of supply-side performance indicators.<sup>32</sup>*

*In this sense, the measurement of international volunteering had moved back in time. The most important measurement was the number of UK volunteers on the program; and the ICS program was not initially placed in one of the key program units, but in what would be recognisable as a communications department, emphasising the importance of 'good news' stories as against development outputs.*

### **A case study of Australia<sup>33</sup>**

*International volunteering in Australia has always had multiple objectives including: technical support for partner organisations in developing countries; professional and personal growth for the participating volunteers; and the fostering of people-to-people relationships. The relative weighting of these dimensions of the program has varied over time depending on dynamics in and around the government's aid administration. International volunteering has mainly been an NGO activity (with up to four organisations at various times), but in the last two decades, this has not been exclusively the case, with for-profit contracting organisations also taking an interest.*

*For most of the time, the standard bearer has been AVI<sup>34</sup>, which emerged out of the Volunteer Graduate Scheme to Indonesia (VGS), which in turn had begun in 1951. This was a successful exercise in post-colonial solidarity responding to an Indonesian invitation to provide Australian know-how. The cultural intent of*

<sup>32</sup> This followed on the back of a previous youth program whose prime focus was development awareness in the UK and was deliberately allocated to organisations who were not international volunteering agencies. See Allum (2012). This new program was delivered by a consortia led by VSO, who had previously warned of the proliferation of gap year programs and had championed a reciprocity model in Global Xchange. See Devereux (2008). However, ICS rapidly developed into a program providing 3,500 UK volunteers per year and Global Xchange was closed.

<sup>33</sup> My thanks to Peter Britton who has contributed this case study.

<sup>34</sup> AVI, formerly Australian Volunteers International, was known as the Overseas Service Bureau (OSB) from 1961 to 1999.

*the scheme was very much to create a new model of interaction whereby the volunteers became part of the Indonesian community and identified with their local colleagues by receiving local salaries and eschewing expatriate privilege. This history has continued to inspire Australian volunteer program practitioners.*

*Alongside the VGS, OSB established the Australian Volunteers Abroad program as a vehicle for skilled Australians to serve as local employees in several African countries, other Asian countries and Pacific Islands. Initially, its funds were sourced from individuals, community organisations and philanthropic bodies. Late in 1965, the Australian government announced it would provide funding support to OSB. This reflected a decision not to establish a Peace Corps style of program, but to support the community-based program that already existed. The government made it clear that it wanted to preserve the organisation's independence and that the support was to provide greater stability and enable forward planning. Initially, the funding was only for operational, not organisational, costs. Conditionality was limited and the formal relationship was conducted principally in an annual meeting where an annual report, plan and budget were discussed. The reports and plans were brief and uncomplicated. In this era, largely because of President Kennedy's international profile and Time Magazine's highlighting of the Peace Corps, all international volunteering was universally acclaimed as a 'good thing'. It required no justification; the only question was, how much of it should there be? How many volunteers and in which countries?*

*Australian government support of the volunteer program continued after the creation in 1974 of a specialist government agency to administer development assistance, reporting to the Minister for Foreign Affairs. From the early 1980s, there was an intensification of what had become a collegiate relationship between the leadership and staff of OSB and their key contacts in the government's aid bureau. Funding increased each year up to 1988. This 'core grant' was further leveraged with additional agreements to place numbers of volunteers in particular countries for specific purposes. Of course there were detractors as well as supporters. There were many who associated the term 'volunteer' with young, inexperienced 'do-gooders', in contrast to the considerably more demanding consultants and aid professionals. These attitudes constituted one constraint in the volunteer*



*organisation-government relationship.*

*Another concern was a recognition that although government funding for volunteer programs had grown substantially, this had not been subject to the same procedures as subsidies to other NGOs. A review process resulted in a Record of Understanding between the Australian International Development Assistance Bureau (AIDAB) and OSB in 1989, which established the basis for a new agreement entitled Australian Voluntary Technical Assistance Program. The name was an important indication of the government's purpose. This was a technical assistance program in which expertise was provided by skilled volunteers. It was recognised that building stronger people-to-people relationships and enhancing the capabilities of the volunteers were significant outcomes of the program but these were not the justification for allocating aid funds. The established practice of annual high-level consultations was continued along with regular contact with AIDAB staff both at headquarters and in the field. The reporting required was financial acquittals, statistical reports on the number and distribution of volunteers, and a narrative report. Stories about particularly successful or interesting volunteer assignments were always welcome.*

*In 1995, changes in the government's aid agency led to a fresh review of the volunteer program. Once again, this led to a new agreement, this time under the name of Overseas Voluntary Technical Assistance Program, thus maintaining the development and technical assistance thrust of the activity. The overall shape and content of the program was largely unchanged, but the new arrangement introduced more requirements for monitoring and reporting. These were designed to strengthen accountability procedures and to bring the compliance requirements more in line with contracts with other 'service providers'.*

*In 1997, AusAID began to pilot a new activity whereby young Australians could undertake short-term assignments in international organisations as well as local ones in a program called Australian Youth Ambassadors for Development (AYAD). This was a high volume, high profile program where the emphasis was much more explicitly on the experience it afforded to the*

*Youth Ambassadors. In 2001, management of AYAD was taken to the market and an Australian managing contractor company (AusTraining) won the tender.*

*Compulsory competitive tendering had become the government's default mechanism for procuring services as well as goods, and the volunteer program was no exception. The result was that, in 2004, AVI was joined in delivery of the program by AusTraining (now Scope Global), which had been able to leverage its management of the AYAD program to secure a portion of the volunteer program. For a time from 2005, the two programs existed side by side as separate streams within the Australian Government Volunteer Program. A review in 2009 recommended a unified program that emphasised capacity development over service delivery. From 2011, the program was known as Australian Volunteers for International Development (AVID). A further review in 2014 by AusAID's Office of Development Effectiveness found that the program was a "highly visible contribution to Australia's aid effort" and was a "cost effective form of capacity development assistance". For the most part, this review focused on the effectiveness of the program's administrative arrangements, and as a result, AYAD was retired both as a separate stream and as a brand.*

*There were repeated efforts to design a comprehensive monitoring and evaluation framework that would show program-wide outcomes. This was always going to be difficult but the effort was overtaken by events. Once the government established a clear numeric target for the number of new volunteers, this measurement became the metric of significance. Alongside the stated aims of capacity development, the program also presents as the 'human face of Australian aid' and its value for public diplomacy has increasingly been recognised.*

*The volunteer program maintains a formalised set of measures drawing on assessments by volunteers and the partner organisations with whom they work. These examine capacity development in the organisations' own contexts as well as growth in the skills and competencies of volunteers. Independent academics have also used data held by AVI, supplemented with their own direct fieldwork, to analyse the factors likely to result in*

*effective assignments.*<sup>35</sup>

*The higher-level task of measuring the development impact of volunteers has proved elusive. AVI has taken the preliminary step towards this in collaboration with a leading university in the field to develop a Theory of Change. This will help shape future research and the development of an impact framework.*

## Conclusion and policy implications for Forum

From a practitioner's perspective, progress to address issues of measurement of V4D has been slow. It would be easy to say this is a result of being locked into a paradigm not of the IVCOs' making. But it is also important to acknowledge that there have been periods when it was taken as read that the contribution of V4D was important and significant. Arguably IVCOs were reluctant to innovate and reposition and tended to remain with models that fitted an earlier era.

However, this is not really about complacency, although that can be read into the situation. Two important preconditions arguably undermine the efforts to demonstrate contribution: firstly, the need to convince key stakeholders of the value of V4D in both the Global North and the Global South; and secondly, the insufficiency in theoretical models that underpin and create a level of robustness and confidence in setting out the framework for V4D.

Where IVCOs have attempted to push the boundaries on the models, arguably they have engaged better with the challenges of measurement.<sup>36</sup> But in some areas, such as youth volunteering, it is certainly arguable that the lack of an evidence-based theoretical model allows the space for contradictory objectives and programs that

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<sup>35</sup> See Fee et al. (2015).

<sup>36</sup> This of course needs to be qualified, but examples such as the paradigm shift in the FK Norway model have arguably generated a positive organisational culture of research, reviewing of models and demonstrable contribution. Nevertheless, ensuring the theoretical model is effectively communicated and understood remains a challenge. See Tjønneland and Helland (2016).

do not satisfy stakeholder expectations.<sup>37</sup>

Consequently, meeting the challenges of measurement of V4D does, at root, demand a significant uplifting in the nature of the theory that underpins the work, alongside clarity and confidence in what it can deliver. It demands creating environments where the contribution of V4D is valued by stakeholders. It demands an evidence base as to what V4D is doing and achieving.

An effective interface between academic research and practitioners is vital to the development of a body of knowledge on understanding and measuring the contribution of international volunteering. In 2013, UNV opened a dialogue with Forum, amongst others, to address the issue of strong evidence-based research that would improve understanding of the contribution of volunteering to development. This has led to the development of a Global Research Agenda, led by UNV in collaboration with Forum and the Center for Social Development, which has provided a focus for academics and practitioners to come together and collaborate to address this issue. This represents the latest stage in a journey of cooperation and collaboration aimed at developing a theoretical underpinning of V4D and demonstrating how it can be measured.

Where this will lead ultimately will depend on the willingness or otherwise of practitioners and academics to collaborate and the resources available to support effective research. From the perspective of Forum, there is now an alignment which offers an opportunity not previously apparent – a body of interested academic researchers engaging with this topic at a far larger scale than before; a growing interest amongst Forum members and membership of the Research Working Group at its highest level; and the context of the SDGs, which offers an opportunity to engage and influence key policy makers. In consequence, Forum should consider the following policy issues:

- Encouraging the active participation of Forum members both in the process of developing theoretical models that can be related to V4D practice and in research collaboration with interested academics.

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<sup>37</sup> For example, the UK Government requires the ICS youth program to meet diversity targets concerning the sourcing of UK volunteers while expecting the program to contribute to development objectives. Local partners and communities are experiencing an increase in short-term youth volunteer programs in contrast to long-term adult programs, which is not based on evidential studies of what local partners and communities require. See Butcher and Einhof (2016).

- Giving full support to the development of the Global Research Agenda, including the collaboration between Forum, UNV and the Center for Social Development.
- Encouraging collaboration between IVCOs and academics working through ISTR (International Society for Third-Sector Research) and actively promoting the findings of crossover work in academic as well as practitioner literature.
- A scaling up of support for research activity generally, but specifically for research that addresses issues of measurement focused on the experiences of communities in which volunteers are placed.



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