International Forum for Volunteering in Development

A HANDBOOK FOR ORGANISATIONS THAT WORK WITH VOLUNTEERS IN DEVELOPMENT

Designing and Delivering Projects: Delivery, Review and Exit

In partnership with Canada

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Introduction

The Global Volunteering Standard is a voluntary standard that seeks to promote continuous learning and improvement for volunteer-involving organisations. It is the result of a collaborative global effort over three years drawing upon the expertise and wisdom of several hundred people and organisations from 80 countries across the volunteering in development sector and beyond. We have aimed to capture and reflect our collective understanding of good practice throughout the volunteering programme cycle:

- **Designing and Delivering Projects**
- **Duty of Care**
- **Managing Volunteers**
- **Measuring Impact**

This manual is the first in a two-part series addressing the Designing and Delivering Projects section. For key terms, please see our **Definitions** document and visit Forum's **Global Volunteering Standard Resource Library** for guiding documents and templates shared by volunteer-involving organisations. The topics in this manual address how volunteers are recruited and selected, using consistent criteria, to fulfil the needs defined by the community.

Good Practice:

Use Forum's Global Volunteering Standard Resource Library to locate resources to complement this handbook by selecting the overall tag label **"Designing and Delivering Projects"** as well as **"Delivery"** and **"Review and Exit".**

Project Management

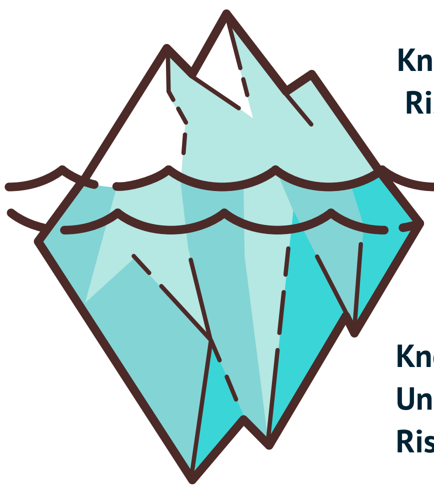
In delivering a volunteering in development project, effective management is essential. Strong project management will ensure that you develop a safe and successful working environment for everyone involved.

MEETING THE STANDARD:

- All people involved in the project, including implementing partner organisations and their staff, as well as volunteers, are aware of the project's desired outcomes and are organised to work together effectively as one team to achieve them.
- All partner staff and volunteers can answer questions about the project and feel empowered to make decisions as it relates to their role.
- All partner staff create a volunteer-enabling environment to maximise the skills, energy, and ideas of its volunteers.

What is project management?

Project management acts as the structure or framework behind a successful project. An overall framework helps to clarify the project objectives, outlines the activities, including monitoring and evaluation, and provides an overview of how to make changes. As an organisation, it is useful for you to outline roles and responsibilities for all stakeholders and identify potential risks and mitigation strategies to minimise issues or safety and safeguarding concerns. Ultimately, it helps you to define the why, what, where, who, when and how much. Project management is an approach that ensures you and your partners as well as your staff and volunteers have a clear understanding and directions on how to proceed and what they are working towards and who to communicate with.



Key elements of project management:

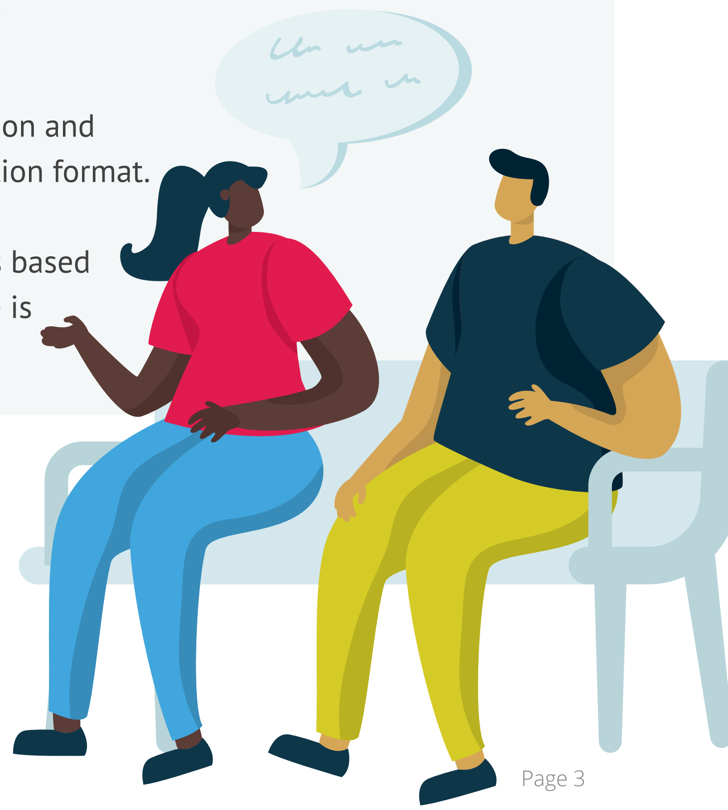
- Defining the project accurately, systematically clarifying objectives.
- Dividing the project up into manageable tasks and stages.
- Controlling the project through its stages using the project definition as a baseline.
- Highlighting risks and developing specific procedures to deal with them.
- Providing mechanisms to deal with quality issues.
- Clarifying roles to provide the basis for effective teamwork.
- Communicating effectively and being accountable are implicit approaches throughout the project's life span.

Good Practice:

Initiate a start up meeting before the start of a project and before the start of a volunteer placement. Ensure you plan the meeting and communicate time and location (in person ideally or virtually) well in advance. Be also sure to share an agenda in advance of the meeting so the individuals involved can come prepared, this includes sharing any readings required for the meeting.
How you structure your meeting agenda depends on the project, but key elements should include the 5 W's, or who, what, where, when, why and how:

- Introductions
- What's the background of the project
- Why are you doing it
- What is the project scope
- What's the action plan
- Who's doing what
- How are you going to work together
- What does success look like

The meetings should encourage participation and discussion, and not solely be in a presentation format. This is important to ensure you are getting feedback and adjusting your project's goals based on the realities and on goals that everyone is enthusiastic about working towards.



People are your Biggest Asset

People, your staff and volunteers, are your biggest assets. A good starting point is ensuring that everyone has a role description that clearly outlines their roles and responsibilities and for volunteers, that it is clear who they will be working with and what project they will be involved in. Create the space to work with your partners and your volunteers to understand their needs, ensure they receive the proper training and that there is agreement in how you are all proceeding together. This will require a start up meeting, check-ins and performance reviews. This will be important for both the work being implemented by the volunteers, but also program check-ins to address challenges, review work plans and ensure knowledge is being shared and lessons learned are documented.

Volunteers within Project Management

Volunteers are motivated by values and therefore their involvement in decision making concerning their projects is an area of value for volunteers. When all involved in a project management team are involved in the decision making, it will be easier for them to understand the reasoning behind choices and thereby accept decisions and act and work in accordance. When the project team members, staff and volunteers are fully aware of the goal and the strategy to achieve it, they are reassured that they are contributing to the goal they signed up for and a goal they believe in. This involvement therefore provides a better working environment for volunteers if they take an active part in decision making concerning the project. This will also ensure volunteers and staff members work both together to complete the tasks while working towards an agreed goal. With this approach, you will create a collaborative and positive team spirit. However, the project lead/or your organisation needs to check in with your volunteers, be invested in their work and create an environment of open communication, where mistakes are discussed and successes are celebrated.

Good Practice:

Celebrating successes can provide a sense of accomplishment that fuels continued productivity and results. Learning from mistakes can help you identify areas where you can improve and avoid making similar mistakes in the future. Example of ways to celebrate successes include:

- Team-building activities, like after-work gatherings or team lunches
- Recognise the contributions of individual team members, highlighting their specific achievements and acknowledgement individually and publicly in like team meetings.
- Create awards or certificates.
- Plan an outing to celebrate successful milestones.

Impact Evaluation

Impactful Volunteering in development requires planned closure and robust reviews of projects, providing evidence of impact as well as learning for future projects. Evaluate the project's total impact and verify with the community. It's also key to learn from the results for future projects as well as the sustainability of what you have already done.

Impact Assessment

Metrics and evaluation allow non-profits and NGOs to quantify the value that volunteers bring to their organisations. Impact assessments allow you to measure the outcomes and impact of volunteer efforts using data, such as the number of participants, services rendered, or goals achieved. It's important to measure the impact volunteers have made so you can see the difference they are making to your organisation and to the communities you work with. You can also look for any improvements that might need to be made to your volunteer programme. Here are some reasons why you might want to track volunteer impact at your organisation:

- To outline the realities of volunteer efforts
- To get buy-in for deeper volunteer involvement inside and outside the organisation
- To help assess your organisation's assets and liabilities
- To determine the impact of program changes over time
- To justify future investments in volunteer services
- To demonstrate effective use of financial contributions
- To provide evidence of community in-kind support for grant proposals
- To build trust and help with decision making

Some ways you can do this include:

- Logging hours
- Using surveys and feedback forms
- Developing case studies and success stories
- Conducting volunteer exit interviews
- Providing volunteer assessment forms
- Ensuring 360 feedback

By quantifying and qualifying volunteer contributions, you can assess their progress and adjust your strategies to better align with your goals and objectives.

Good Practice:

Measuring volunteer impact helps in demonstrating value to stakeholders but also aids in recruitment, resource allocation, and mission fulfilment.

Good Practice:

Utilise the resource library and search for "evaluation" tools and guides shared by other organisations can be of great value to your evaluation needs.

Good Practice:

360-degree feedback is a method of employee review that provides each employee the opportunity to receive performance feedback from their direct supervisor and 2-3 of their peers/coworkers, reporting staff members, volunteers, and, in some cases, project participants.

This strategy helps workers understand their strengths and weaknesses from a variety of perspectives as you are drawing feedback from different sources. The employee being evaluated should be allowed to outline which individuals they would like to receive feedback from and the person(s) giving the feedback can provide as much or as little information as they would like.

Community Involvement

MEETING THE STANDARD:

Community members, organisations, volunteers and other stakeholders participate in project reviews and all monitoring, evaluation, and learning exercises.

The community is presented with the evidence and learning from the project.

Organisations share evaluation findings — both successes and challenges — with all internal and external stakeholders.

Engaging community representation in needs assessments and project design are a growing and important phenomenon. Including community members in evaluation and impact assessments are equally just as important. Involving community members in an evaluation can strengthen the community's understanding of and experience with the project and evaluation, and increase their sense of agency through meaningful participation. Community representation in an evaluation can also strengthen credibility among community members and program staff, improve the accuracy of data collection and findings, and support community buy-in of evaluation activities. There are also benefits to evaluators. Engaging community representation in an evaluation can help evaluation staff gain more awareness and knowledge of the community's strengths, challenges, and systemic barriers.

Community representation in evaluation can range from no presence to being a fully community-driven effort. The image below taken from Engaging Community Representation in Program Evaluation outlines the progressive steps in community engagement.[1]

Community Involvement/Activity

Community is not included in any aspects of the evaluation	Community informs the evaluation and mat or may not be informed or included (or know they're informing)	Community provides input and feedback to evaluator to inform the evaluation	Community has some active role in the evaluation	Community initiates the evaluator agena/priorities	Community shares equally in decision-making and ownership	Community leads and owns the evaluation
No Community Involvement	**Community Informed**	**Community Consultation**	**Community Participation**	**Community Initiated**	**Community Based Participatory Research**	**Community Driven/Lead**
Evaluator works independent of community	Information is gleaned from the community which informs the evaluation	Evaluator consults with community and includes community in the evaluations (front or back end)	Evaluator includes community in the evaluation in a defined role	Evaluator responds to specific needs or asks from community	Evaluator shares equally in decision-making and ownership with community	Evaluator supports community identified evaluation efforts or serves no role

Evaluator Involvement/Activity

1 https://www.acf.hhs.gov/sites/default/files/documents/opre/engaging_community_rep_feb2023.pdf

Good Practice:

Strive to incorporate lived expertise in your evidence-generating efforts. It improves the relevance and accuracy of evaluation and it helps to move power from evaluators to the people who have more direct experience with the project.

Evidence and Learning

Monitoring and evaluation contributes evidence to improve strategic planning, project design and resource decisions. Evaluations can help explain why programs are succeeding or failing and can provide recommendations for how best to adapt. Evaluations are also integral to knowledge and learning and support decision making.

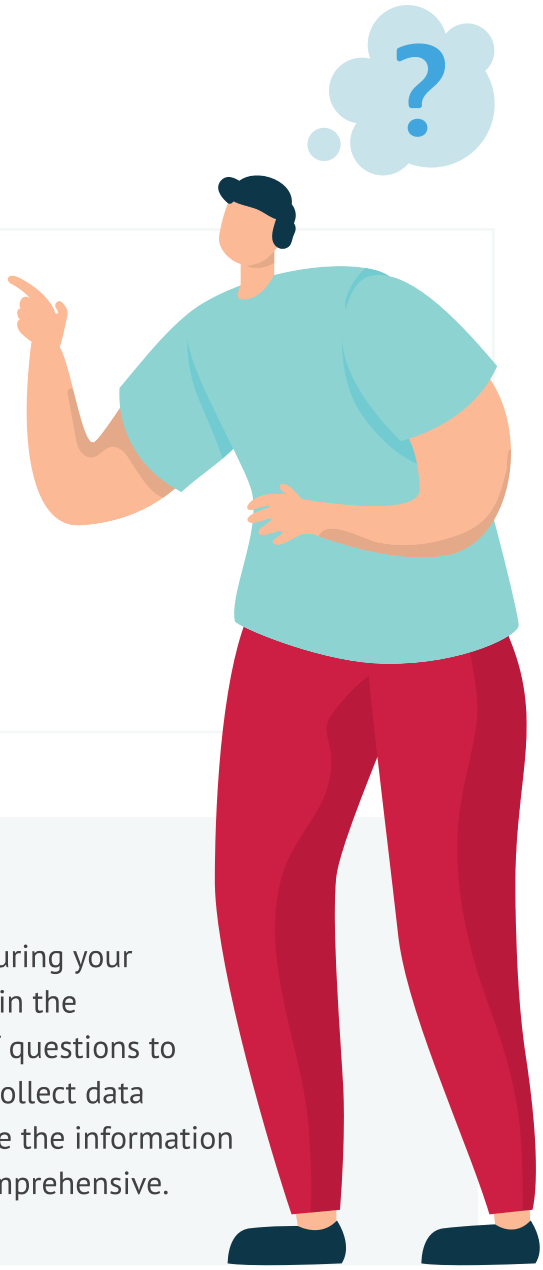
Evidence-based decision-making refers to the process of using reliable and valid data and information to make decisions about programs, policies, and interventions. Evidence-based decision-making requires a systematic approach to data collection, analysis, and interpretation. It involves using a variety of quantitative and qualitative methods to gather data, including surveys, interviews, focus groups, and observations. Once the data is collected, it is analysed and interpreted to identify patterns and trends, and to draw conclusions about program and volunteer effectiveness. Some of the benefits of using evidence-based decision-making include:

- **Improved Program & Volunteer Effectiveness:** Allows your organisation to make informed decisions based on reliable data and evidence. This leads to better-designed programs that are more likely to achieve their intended outcomes.
- **Resource Optimization:** Enables your organisations to allocate resources more efficiently and effectively as resources can be directed towards the areas that are most likely to have the greatest impact.
- **Increased Accountability:** Helps to increase transparency and accountability in program management. BIt helps you identify and address problems in a timely manner, which leads to greater accountability and better results.
- **Stakeholder Engagement:** Helps to engage stakeholders, including program participants, funders, and partners. By involving stakeholders in the program design and evaluation process, they become more invested in the program's success and increase the likelihood of their participation and support.
- **Continuous Improvement:** Promotes a culture of continuous improvement. It allows you to identify areas for improvement and implement changes that lead to better outcomes over time.

For evidence based decision-making and evidence-based monitoring and evaluation to work, you will need to invest the time and resources, you will need to create quantitative and qualitative tools to collect data and you will need to create a culture of evidence-based decision making within your own organisation and ensure that the information collected is analysed, shared and utilised for improvements and learning.

Learning is a collective effort. This includes generating and sharing knowledge about how best to achieve development outcomes through well-designed and executed projects and using that knowledge to inform decisions, adapt ongoing projects and improve the design of future projects. Understanding what works, how, and why is critical to achieving and sustaining meaningful impact. Evidence can be used to:

- Adapt programmes
- Develop future programmes
- Revise program designs
- Change governmental policy
- Learning opportunities



Something to think about:

Oxfam Canada utilises a feminist monitoring, evaluation, accountability and learning (MEAL) approach which shifts power to participants in evaluations. In Feminist MEAL processes, partners and participants are involved in every stage of the MEAL process from the collection, analysis, writing and dissemination of data (evidence) through knowledge and learning initiatives.

Good Practice:

Using mixed methodologies for evaluation and ensuring your partners and your project participants are involved in the evaluation process by answering a broader range of questions to capture complex intersectional data allows you to collect data that might be missed and enables you to triangulate the information collected and to generate evidence that is more comprehensive.

Evidence-based project management is an approach that emphasises using evidence to make informed decisions throughout a project's lifecycle. It involves collecting and analysing data to guide planning, execution, and evaluation. By relying on evidence from previous experience rather than intuition or anecdote, it aims to improve project outcomes and minimise risks.

Evaluation findings, especially qualitative findings, can sometimes be influenced by your assumptions, biases, methods, and sample size. Therefore, it is important to validate these findings by checking their accuracy, consistency, and relevance. Validating can help you avoid reporting errors, misleading conclusions, or irrelevant recommendations. To ensure that you are sharing accurate information, it is good practice to undertake validation exercises with your respective community members and partners. This ultimately ensures the accuracy of the data collected and the validity of the information. You can do this in a variety of ways, at different stages of the evaluation process, for example:

- **Immediately after data collection:** Participants can review their transcripts and are invited to check the accuracy of the data. Participants can be given the opportunity to add, remove, or clarify their statements.
- **During data analysis:** Participants can be invited to review preliminary themes and how their reactions and statements fit into these themes, leaving room for further discussion and (re)interpretation of data.
- **After data analysis:** Participants can review draft reports with their contributions highlighted for review. Often, at this stage, participants are limited in their ability to change their contributions or provide additional context, but it gives them a better idea on how their data is presented and used. However, if the participant wants to make changes or withdraw their information at this point in time, this should be respected, even if it leads to a re-analysis of the data.

While validating the findings should be part of your good practice, there are times when it can be challenging.

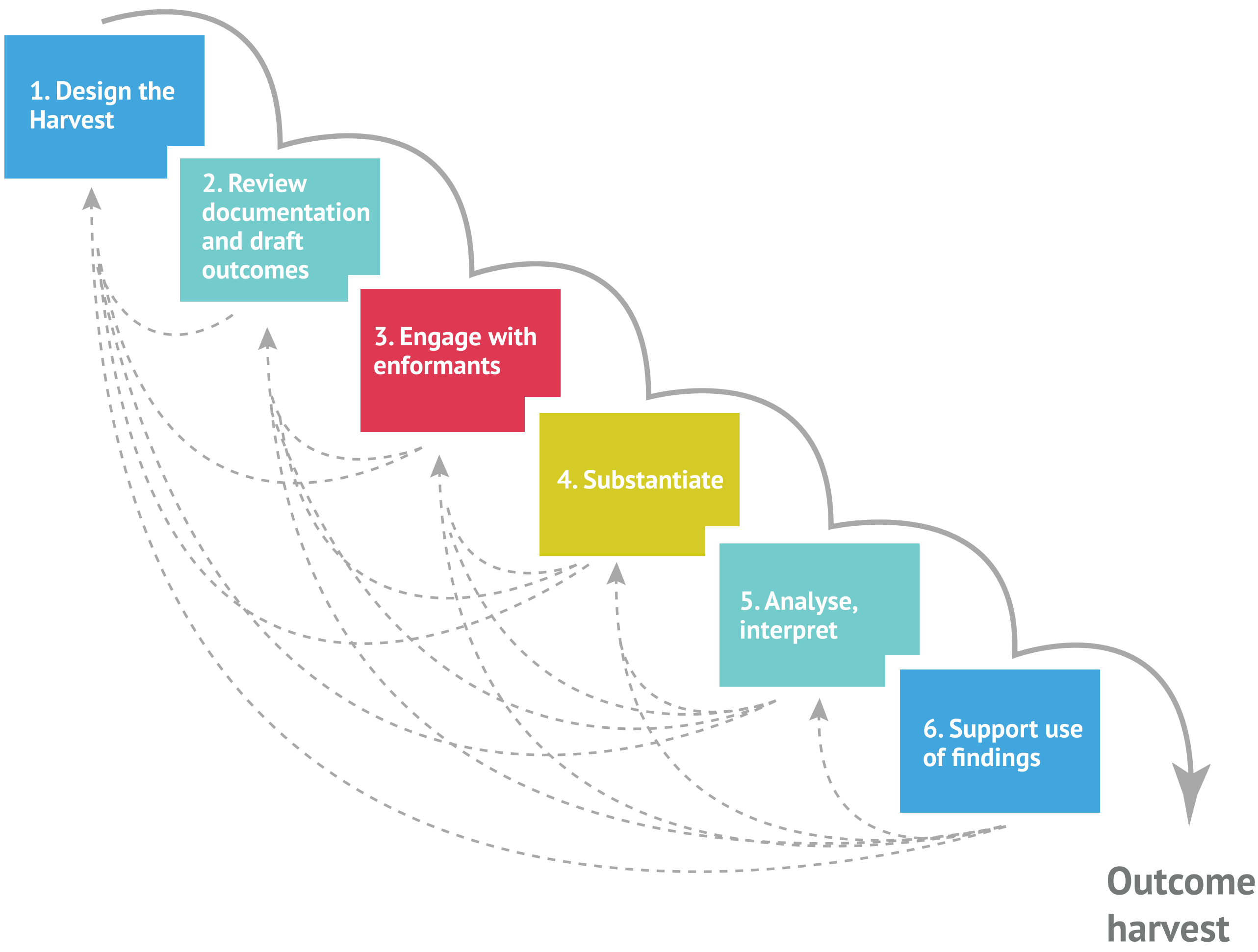
After validating, one should report in a clear, concise, and compelling manner. A format and language that suits the audience and purpose should be used.

Why Validate?	Challenges
You need to build trust with your participants. Giving them the chance to edit or clarify what they said can help participants trust you. This can also be a valuable step if you know you'll need to return to this same group for future data collection.	You have a short timeline or small budget. This takes extra time and therefore more money. You want to make sure to support participants when they are contributing to a project initiative. It will be important to include this aspect in your budget and workplan from the onset of the project.
Confidentiality in a small sample size. Giving participants the opportunity to redact statements, especially how they will appear in context, can help to preserve their confidentiality, or ensure that they are aware of what will be shared and how.	Your participants are short on time or doing so will be burdensome. For those that are busy or do not have a lot of capacity, this is another activity you are adding to their plate. You need to make sure you provide enough time and resources to make validation possible.
When the topic or content is sensitive. This can support participant confidentiality, allowing them to review how you've used their information	When you are unable to conduct the validation exercise in their preferred language or where literacy levels are low. Providing written summaries or transcripts may not be a viable option and you will be required to find other ways to support this process.
When you are not familiar with the context. This can aid in interpretation and analysis and provide additional context.	If you are unable to make changes to your analysis and results, validation becomes impossible. Give yourself time to make sure you can validate with participants.
You need enhanced validity. Validating the findings can add rigour and validity. Consider using it when other validation techniques, such as triangulation, are not possible. This can provide evidence that your interpretation and analysis are appropriate, accurate, and reflect the content of the discussion.	Sometimes it takes a long time to gather and analyse data. Validating the findings loses its benefits when it is done a long time after data collection has occurred as participants may not recall the purpose or context as clearly. You may wish to then validate while part way through the data analysis.
You are conducting a participatory evaluation. This is an opportunity to include participants in data collection, analysis, and reporting. This can support community buy-in for the evaluation and its results.	In cases where the participant may not feel comfortable contradicting the evaluator or the findings, this exercise may not provide the value or validity you are hoping for. In some cases, you may be able to use other people or methods to even out the power imbalance.
	In some cases, asking participants to review their contributions can be distressing, especially if the data are gathered about a sensitive topic. Be aware of this when designing validation activities. Additionally, if participants don't see their contributions reflected in a summary or the themes, it may leave them feeling isolated or unheard. Check in with participants to discover where there might be gaps.

Outcome Harvesting

One evaluation approach that brings together evidence-based evaluation and learning and that ensures participation from all key stakeholders, from implementers to participants, is Outcome Harvesting. Outcome Harvesting does not measure progress towards predetermined objectives or outcomes, but rather, collects evidence of what has changed and, then, working backwards, determines whether and how an intervention contributed to these changes. The outcome(s) can be positive or negative, intended or unintended, direct or indirect, but the connection between the intervention and the outcomes should be plausible. Outcome Harvesting is a great approach, but one that requires resources, time and commitment, and a willingness to do something a little bit differently! The steps in outcome harvesting can be seen in the image below, with more information on how to conduct it, can be found here: [Outcome harvesting | Better Evaluation]

Steps in outcome harvesting



Sharing Findings

To create a reciprocal environment of knowledge exchange and to support a transparent approach, sharing your findings with all stakeholders is important. This includes, sharing information with the any or all of the following:

- Donors
- Partners
- Community members and participants
- Staff and volunteers
- General public

When sharing lessons learned, start with defining your key audiences and their needs, interests, and preferences, as communicating with one group of stakeholders will be different from another group.

Things to consider:

- identify the appropriate, preferred, and commonly used communication channels for your audience
- understand their values, roles, and needs
- provide formats or features of products that appeal to them
- understand their motivations, attitudes, and beliefs related to the project
- acknowledge what is within their sphere of influence
- consider their technical expertise and experience

You also need to identify what you want the audience to take away and do with certain information. Remember, evaluation results may not always be expected or positive but consider how they can still be useful:

- identify the key messages that will help you achieve your goal for use and action
- tailor the language and format considering the key audience's expertise and preferences,
- ensure that reports are culturally and contextually appropriate
- plan ahead for how and when you will be developing and disseminating the product

Results can be shared in many forms. If you have individuals within your community or organisations that are communications experts, engage them to support you with the creation of the tools you would like to use in sharing your information. Forms of communication used by organisations include:

Format	Description
Evaluation Summary	Overview of evaluation methodology and key findings/takeaways
Presentation	A verbal session in person or virtually that highlights the high-level results and recommendations relevant for specific stakeholders, with an opportunity for question and answer or discussions regarding the findings.
Newsletter or press release	A short publication that provides an update/overview and highlights key findings for a particular audience; could also include a blog post or podcast discussion.
One-Pager	One or two-page report including overview of the program, and key findings of the evaluations. This should be visually appealing and easy to read.
Success Story	Anecdotal or qualitative evidence of a program's success. A good success story is often about an individual that has been impacted by the project.
Social Media	Sharing bite size information about the key findings and highlights to entice the audience to want to read and learn more about the project.

Good Practice:

It is important to plan for translating, communicating, and disseminating your evaluation findings to inform and help your stakeholders and intended audiences to understand them and/or to use them to improve, sustain, or make other decisions about the program or future programs.

Evidence for advocacy

Effective advocacy is strengthened by the gathering and presentation of evidence to make a case for change. To be truly effective in advocacy, evidence needs to have a specific purpose and be targeted to address the needs of stakeholders, supporters, policy-makers or politicians. The format of that data and evidence and the method of its delivery is equally important to ensure successful advocacy. Human stories work well to illustrate a particular impact but most funders and government officials will also require statistical evidence. The best 'making the case' evidence is often that which combines the personal and the universal, quantitative and qualitative data, to tell a rounded and compelling story as succinctly as possible.

Keeping People Safe

As an organisation undertaking any form of impact assessment, you are responsible to protect participants from any harm arising from the process. Whether you are conducting the work yourself, or hiring external consultants to support this process, certain principles should be adhered to, including:

- Receiving informed consent either verbally or in writing
- If a participant is under the age of 18, they should be providing verbal consent but a guardian should also consent to their participation
- Protecting privacy and maintaining confidentiality
- Additional safeguarding measures put in place, especially when dealing with sensitive subjects.

Good Practice:

Seek permission and consent when interviewing individuals. It is also important to inform them of how the information they share will be used. Individuals participating in assessment interviews/surveys have the right to end the interview at any time and skip questions they do not feel comfortable responding to.

Next Steps

This manual is only one of a series of guides outlining the sections of the Global Volunteering Standard. We encourage reading through the other guides for a holistic understanding of volunteer management.

For more information on the Global Volunteering Standard and access to the Resource Library, as well as an organisational Self-Assessment Tool, please visit the Global Volunteering Standard Platform: www.forum-ids.org/global-volunteering-standard-platform/.

To learn more about Forum or become a member, please visit https://forum-ids.org/. To share any feedback on the guide, please email globalvolunteeringstandard@forum-ids.org

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forum

The International Forum for Volunteering in Development, commonly known as Forum, is a global network of organisations that work through volunteers to achieve sustainable development. Forum promotes more responsible and impactful volunteering by sharing information and good practice through convening, research, and the Global Volunteering Standard.

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