

VOLUNTEER SERVICE ABROAD
(VSA)

REVIEW

2003-2007

Volume I

Main Report

Sue Emmott
Virginia Jealous

April-May 2007

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1 Executive Summary

1. VSA has received a significant proportion of its budget from the New Zealand Government since it commenced operation in 1962. This review is one of a series taking place approximately every four years and was carried out to assess the extent to which VSA is fulfilling the purposes outlined in the Comprehensive Funding Arrangement (2003-07).

2. The Terms of Reference focus the review on: how VSA's implementation of a development approach to volunteer placement contributes to community development and poverty alleviation; how the design and implementation of the Monitoring and Learning Framework is influencing planning processes and development practice; how effective communication and coordination is between NZAID and VSA; what changes should be made to the funding arrangement; and what actions were taken on the 1998 MFAT Review and the 2002/03 Social Accounts.

3. The review methodology was consistent with the NZAID Evaluation Principles of partnership, independence, participation, transparency and capacity building. The main limitation is the exclusion from the scope of the External Relations Unit which is a significant component of VSA's work and is integrated with development work abroad. Methods were predominantly qualitative and included interviews with a wide range of stakeholders from NZAID, VSA and partners. Two field visits were undertaken, in Cambodia and Vanuatu, with the participation of the NZAID Civil Society Manager and two VSA Programme Officers for the purpose of learning in both organisations.

Development Effectiveness

4. Overall the Review found that VSA is managing a programme in line with the Strategic Framework for Relations between NZAID and NGOs and the Funding Arrangement. It evaluated as a volunteer sending organisation VSA's performance is very good, if not excellent, with refined systems and processes for that purpose. However, VSA intends to become more development oriented in its approach and it is in that area that there are a number of challenges, in particular placing partners rather than volunteers at the centre. In making ongoing and positive change to that end VSA is demonstrating consistently good progress with clear strategies and planning processes.

5. The Review was asked to consider the extent to which VSA's developmental approach contributes to community development and poverty alleviation. However, this is not the language used by VSA itself and there is no common definition of development with NZAID over and above the Strategic Framework for Relations between NZAID and NGOs. The Paris Declaration has been used as a reference point because it relates to development effectiveness and enshrines the principles of alignment and harmonisation to which NZAID fully subscribe. VSA partially subscribes in the sense that the Strategic

Intent, and the Strategic Plan before it, talk about harmonisation with governments and the Millennium Development Goals.

6. In responding to partner needs and priorities VSA has undergone significant and positive change, guided by consecutive strategic plans which have become more clear in their purpose and intended outcomes. Recruitment of staff with development experience is assisting this process and planning processes at the Wellington end are now highly refined. However, VSA is currently operating in both volunteer sending and development modes. Where good development is happening, an assignment is well scoped through a full and participatory process with partners, an appropriately qualified volunteer is identified, and skills are shared in both directions. In other cases assignments are supply driven, less-thoroughly scoped than they could be, and are not linked to government policies and programmes.

7. VSA is a small organisation which lacks both human and financial resources to be able to do detailed analysis. Although its country strategies have improved they are currently too broad to provide a basis for selecting or rejecting requests from partners and they lack criteria for both beginning and discontinuing support. Analysis of the development context in each country is relatively weak and insufficient to enable VSA to find an appropriate niche. This is particularly important in countries where there is a large aid effort and focused assistance is essential if it is to be effective. VSA will therefore benefit from greater engagement with NZAID and other volunteer organisations in order to enhance analytical capacity and strategy formulation. Without this VSA is likely to respond to a range of requests which are worthy in themselves but which do not add up to a focused and effective approach which can maximise impact.

8. VSA does not have an experienced development representative in most countries and this appears to reflect ad hoc or organisational rather than development decisions. This makes VSA a centralised organisation in comparison with other donor and development agencies that are decentralising in order to develop deeper partnerships through greater understanding of the issues and engagement on the ground. There is a strong argument for basing staff with development experience in country rather than in Wellington to achieve greater development effectiveness.

9. Volunteering is a form of TA (technical assistance through personnel who primarily aim to build capacity) which is a common mode of aid delivery for many donors. VSA, which is a donor of TA, therefore faces many of the same challenges in supplying and managing volunteers as other agencies or companies do with highly paid consultants. In general expectations of TA tend to be over ambitious and its actual effectiveness in influencing change and capacity development is often low because it is dependent on many external organisational, institutional, social, political and cultural factors. Global experience shows that, without strong local ownership, TA is often too fragmented to create systemic capacities. Therefore, where volunteers are working alongside consultants there is a need to define roles carefully and scope assignments appropriately in the spirit of alignment with government and harmonisation with other donors.

Impact

10. There is strong anecdotal evidence that VSA volunteers contribute to changes in individual performance and attitudes by acting as good role models and providing mentor and coaching support. However, measuring this is challenging and VSA, whilst sincerely endeavouring to do so, has little actual evidence. In some cases it is possible that volunteers have negative impact if they replace a local staff member or stay longer than is useful. An important limiting factor in terms of impact beyond that of individual volunteers is the absence in many countries of staff with the appropriate development experience and expertise who can deepen partnerships and engage more fully with both government and other donors and volunteer agencies.

Partnership with NZAID

11. VSA is engaged in a complex web of different relationships, many of them taking place at distance, between NZAID and VSA, within VSA itself, and between VSA and partners. VSA is also affected by internal relationships within NZAID. At present most of these are not yet partnerships because they lack joint clarity of purpose. The Strategic Framework enshrines the independence of NGOs, which is valued by both NZAID and VSA, but an unintended consequence is that it complicates and confuses the dialogue about partnerships, in particular in relation to alignment with NZAID. Alignment arises as an issue only in discussion about in-country costs but it distorts the dialogue and has been the source of some antagonism. For some NZAID Posts the key issue is often whether or not non-core funding is appropriate.

12. In the current structure, and with current relationships, it is difficult to identify real incentives for VSA to align with NZAID and VSA has been, and remains, free to pursue its own agenda in countries of its choice. It is only when development effectiveness is considered that the drivers are clear. As a volunteer sending organisation VSA is able to have some small but tangible impact, notably on individuals, although there has been longstanding learning in volunteer agencies that the role of volunteers has often been more about capacity lending than capacity building.

13. VSA's stated intention to harmonise its programmes with the development strategies of country governments is in line with the Paris Declaration but the challenge is to turn the rhetoric into reality. In comparison with volunteer sending, development is a much more complicated and less definable challenge. If VSA is to make a greater contribution to development impact it will need to focus its efforts in line with the 'fewer, longer, deeper' approach taken by a number of donors and NGOs. Thinking on this has already begun in VSA, and some programmes or components of programmes are already being focused, but overall VSA will benefit by doing less but with greater depth and for a longer period. Much of the challenge is in developing a clear concept of what volunteering means in the current era and VSA has several initiatives to do this.

14. The current Funding Arrangement has been, for both NZAID and VSA, a great improvement on the previous version and is a permissive document to the extent that it permits a range of possibilities and does not limit. The key issue that faces VSA and NZAID is the purpose and nature of their relationship and the extent to which they should move towards a deeper partnership with alignment. Removing the cumbersome processes for funding in-country costs is a recent positive move but it removes the one compelling opportunity to engage on the subject of alignment. If the principles of the Paris Declaration have resonance in VSA, then the way forward is to align (harmonise) more closely with NZAID on the basis that development effectiveness is increased by harmonisation. This could be done on an experimental basis in two countries (such as Solomon Islands and Vietnam) so that the potential could be explored in practice but without committing VSA to change across the board which may, for other organisational reasons, not be appropriate.

Learning

15. Where relationships are weak there is little opportunity for learning to flow and therefore influence VSA's planning. VSA is learning in a number of different and important ways but there is generally no structure for learning to be shared. In contrast, where partnerships are strong learning is strong. This is demonstrated between partners and volunteers and is the place where VSA has the best opportunity to capture, analyse and share the learning. It also locates partners, as the agent of community development, and volunteers, as the agent of change, at the centre of the development process. Information capture is strong but could be better shared. If volunteers better understand the long-term importance to VSA of their experience in-country, and if they and partners are encouraged to report in a way that is mutually relevant and useful, this will strengthen partnerships and is likely to increase development effectiveness.

16. The Monitoring and Learning Framework encourages an institutional approach to learning and is fluid enough to incorporate varying interests. It has moved VSA forward from monitoring as evaluation to monitoring as learning and there are good results to date with outputs, such as case studies and the Partner Conferences, informing VSA practice. Its weaknesses are that it is difficult to quantify how much learning feeds back into VSA and there is room to become even more 'SMART'. The MLF is a work in progress which has recently been revised and is already operational in line with the new Strategic Intent. At present it is too early to assess its potential for ongoing influence.

Accountability

17. The recommendations of the 1998 Review have mostly been implemented and, where they have not been, there was a good reason. Almost ten years have passed since the recommendations were made and both their language and quantitative focus reflect a different era and different approach from the current Review. The 1998 Review was heavily weighted towards figures and financial matters and all of these have been addressed by VSA. Since 1998 the move towards 'volunteering for international

development' has been clearly demonstrated during the lifetime of two CEOs and several consecutive plans which show significant progression in clarity of purpose, intended outcomes, and ways to monitor and learn. VSA has also professionalized across all units in order to achieve better development effectiveness.

18. The 2002/03 Social Accounts were a new and unknown way for VSA to engage with its stakeholders. Action from the Social Audit has been taken and is seen as ongoing with the Planning and IT Manager actively driving the process forward. Tangible outputs exist in the form of workshops and handbooks, creative staff meetings and better support systems across the five key areas of council, staff, volunteers, profile raising/development education/fundraising, and branches.

19. Conclusions

Development Effectiveness

VSA's processes for recruiting, sending and supporting volunteers have continually improved and are highly effective. Processes for meeting the needs of partners are less well refined, reflecting VSA's history as a volunteer sending organisation, but are continually improving.

At country programme level there is some excellent work being done by volunteers in their capacity building role as coaches and mentors. Partners and other stakeholders are generally impressed with the quality of the volunteers. VSA staff are less engaged with partners than the volunteers are and their concentration in Wellington acts as a barrier to developing full, equal and developmental relationships with partners in country.

VSA is making progress in the transition to being a development organisation but there is a tendency to be opportunistic rather than strategic in choices about partners and assignments. This can result in a collection of disparate assignments at country level rather than a focused and coherent programme which adds value to a larger collective effort. Scoping of assignments is perhaps the weakest area of VSA's practice.

Measuring impact is difficult and VSA holds little evidence other than anecdotal. It is highly likely that VSA volunteers contribute to changes in individual performance and attitudes by providing good role models and being a continuing source of motivation and support.

If compared with the kind of TA generally provided by donors through highly paid consultants VSA is highly cost effective.

Relationship with NZAID

The relationship between NZAID and VSA is good in terms of meeting contractual obligations but does not constitute a meaningful partnership. Under the Strategic

Framework VSA is free to develop programmes in countries of its own choice and there has been no incentive to discuss alignment other than around in-country costs. If VSA wishes to be more effective in development it has much to gain from a deeper partnership with NZAID in which it can benefit from NZAID's greater resources to analyse and develop strategies and its proximity to the anti-poverty agenda of the partner government.

The current Funding Arrangement has met the needs of both NZAID and VSA. The key issue which faces NZAID and VSA is defining the purpose and nature of the relationship. At present the focus of the relationship is Wellington but, if VSA and NZAID aim to improve development effectiveness, the focus of the relationship actually needs to be in-country.

Learning

The MLF is facilitating a learning culture in VSA and there are examples of positive outcomes that impact on processes. However, it is essentially a tool for use in Wellington and amongst staff whereas the strong relationship between partners and volunteers is the place where VSA has the best opportunity to capture, analyse and share learning.

Volunteers have little sense of how their experience feeds back and informs VSA and this highlights a gap between what is required and what is received. Strengthening reporting so that it is equally important to volunteers and their work with partners will strengthen partnerships. Learning in country would be more effective than improving processes from Wellington.

Substantive learning takes place at individual level between volunteers and partners but the monitoring of this is currently weak and a more structured approach would be valuable. Attempts to improve on measuring impact would be valuable. Learning between VSA and NZAID is under-developed but has potential to enhance each organisation.

Accountability

The majority of the recommendations of the 1998 Review have been implemented and a range of improved processes and outputs have resulted from the 2002/03 Social Audit, most notably the MLF.

20. Recommendations

1. Define Emphasis

That VSA more clearly define the parameters to which it wants to go in its move towards 'international volunteering for development', in order to clarify whether the emphasis is on the volunteering or on the development.

2. *Shift focus in-country*

That, if VSA's emphasis is towards development, it considers devolving responsibility to staff strategically located in-country, in order to become more developmentally effective.

3. *Revisit relationship with NZAID*

That VSA and NZAID individually and jointly revisit the purpose of their relationship and decide on what basis to take it forward – relationship (characterised by convenience or necessity) or partnership (characterised by close cooperation with clearly defined joint rights and responsibilities).

4. *Experiment in Alignment*

That if VSA and NZAID decide to move forward as partners, an 'alignment experiment' during the term of the next funding agreement is considered. This would see a cluster of volunteer placements in one country that would be both fully aligned with NZAID and entered into with partners who subscribe to host government development agendas.

21. Issues for Follow Up

Issues that VSA will need to consider if it continues to move towards a development approach include:

- revisiting the placement of staff in-country, and weighing issues of cost effectiveness against development effectiveness;
- addressing issues around volunteer expectations of pastoral care - rather than development resource support - by staff in-country;
- reviewing its control mechanisms for a targeted and strategic scoping of assignments, particularly in the context of 'fewer, longer, deeper'.

Issues that VSA and NZAID will need to consider in a move towards greater partnership for development effectiveness include:

- implications arising from the notion of independent action as enshrined in the NGOs Strategic Framework, and alignment (together and with other actors) as both a necessary and desirable part of development effectiveness;
- ways in which the high level Paris Declaration partnership commitments of ownership, alignment, harmonisation, managing for results and mutual accountability can be best realised, applied and measured by agencies working on the ground; that is, bridging the gap between policy and practice;
- the integrated nature of development effectiveness, partnership and learning.

2 Background

Since Volunteer Service Abroad (VSA) started operation in 1962 the New Zealand Government has provided a significant proportion of VSA's budget through the Official Development Assistance (ODA) Programme. NZAID currently provides support to VSA in accordance with a four-year comprehensive funding arrangement (2003-2007) agreed on an annual basis.

A core grant supports VSA's work in developing partnerships, identifying and scoping assignments and recruitment, placement and management of volunteers in the field. It also supports VSA's governance, development education, public awareness and fundraising programmes. In addition NZAID provides non-core grants to contribute to the in-country costs of volunteers in specified countries where partner organisations do not have adequate resources to meet these costs.

VSA promotes international volunteering for development, linking New Zealanders with people working to create positive change in their communities and countries. Working in partnerships with government, NGOs and community-based organisations key development needs are identified. VSA then responds to requests for skilled volunteers to support its partners improve their development outcomes.

A core tenet of VSA's approach is about working and learning together with partner organisations to create pathways for change. VSA is currently working in 15 countries across Africa, South-east Asia and the Pacific and has approximately 100 volunteers on assignment at any time.

In 2004/2005 VSA developed a Monitoring and Learning Framework (MLF). The MLF was designed to provide a structure and mechanism for documenting the progress towards implementing VSA's strategic plan. Whilst primarily a learning tool for VSA, the MLF also provides additional key performance indicators for reporting to NZAID. The indicators developed are based on "signs of achievement". They describe what VSA would like to be able to demonstrate about its work as an organisation. Each year a monitoring plan with the key analysis to be undertaken is developed from the MLF, and the results reported on.

The Ministry of Foreign Affairs and Trade undertook a review of its support to VSA in 1998. In 2002/2003 NZAID funded VSA to undertake a Social Audit, and the results were presented as a set of Social Accounts. The 1998 review provided specific recommendations for implementation, and the Social Audit highlighted areas for VSA to focus on.

2.1 Purpose

This review is one in a series scheduled to take place every four years. The Social Accounts took the place of the 2002 scheduled review, and it is now almost ten years since the last one. The review is being carried out to assess the extent to which the programme managed by VSA is fulfilling the purposes outlined in the agreement between VSA and NZAID, and to consider if a new funding arrangement should incorporate different purposes and objectives. For both NZAID and VSA it aims to provide a learning opportunity for the purpose of improvement as well as contributing to accountability. Terms of Reference for the Review are attached as Annex I.

2.2 Objectives

The Terms of Reference specify that the review will focus on:

- How VSA's implementation of a developmental approach to volunteer placement contributes to community development and poverty alleviation
- How the design and early implementation of VSA's Monitoring and Learning Framework is influencing VSA's planning processes and development practice
- What changes, if any, should be made to the current comprehensive funding arrangement when drafting the arrangement for 2007 – 2011
- What are VSA and NZAID's views on the effectiveness of current communication and coordination between the two organisations and what, if any, policy and practice implications arise from these perceptions
- What actions VSA has taken to implement the recommendations of the 1998 Ministry of Foreign Affairs and Trade review and respond to the results of the 2002/03 Social Accounts?

2.3 Scope

The scope of the Review was to consider all the work of VSA excluding that of the External Relations Unit (public awareness, development education and fundraising). The time period covered was the duration of the current funding arrangement (1 July 2003 – 30 July 2007).

The main stakeholders involved in the review were staff of both NZAID and VSA (including New Zealand and in-country staff), VSA volunteers and in-country partners. The review considered key questions in particular detail in two countries (Cambodia and Vanuatu) but did not aim to review work in Africa.

2.4 Terminology

For clarity and brevity in the report, the term 'partner' is used to describe the organisations that VSA place volunteers with, in accordance with common development terminology. In relation to VSA, the term 'staff' is used to refer to paid employees in New Zealand and in-country and 'volunteers' refer to those voluntarily assigned to overseas positions by VSA. Where 'VSA' is used generically it refers to the organisation headquarters in Wellington.

In the Paris Declaration the term 'alignment' is used to refer to supporting the government agenda and 'harmonisation' is used to refer to working with other donors. In documentation between VSA and NZAID the term 'alignment' is used to refer to the relationship. Whilst it would be more appropriate to talk about VSA harmonising with NZAID, the report uses 'alignment' in keeping with the terminology being used. Where the Paris Declaration is referenced the terms are used accordingly.

VSA is sometimes referred to as a donor because it gives aid in the form of volunteers. It is recognised that VSA does not identify itself as a donor.

3 Methodology

A full description of the methodology is contained in the Workplan which is attached as Annex II.

3.1 Review Principles

The review approach was consistent with the principles specified by NZAID:

- *partnership*: the review was undertaken with full involvement of VSA at every stage of the process including representation on the Steering Group. VSA ensured that partners were informed of the purpose of the review
- *independence*: the review was carried out by two independent consultants who aimed to avoid any political or organisational influence in the findings
- *participation*: the review was undertaken with participation of all stakeholders in Wellington and in-country, including participation by VSA and NZAID staff in the field work component.
- *transparency*: the evaluation process was open and understood by all parties. VSA's partners were involved with the understanding that it was VSA that was being reviewed rather than their organisation
- *capacity building*: the review had an explicit aim to build capacity within VSA to undertake an evaluation process and to enhance learning within NZAID

3.2 Limitations of the Review

There were three limitations to the review:

1. In accordance with the terms of the Funding Arrangement the team included staff of NZAID and VSA. It was anticipated that, during field visits, this might limit the willingness of partners and volunteers to speak freely. With partners this did not appear to be an issue as their ability to speak freely is more likely to be affected by cultural factors rather than by the presence of non-independent team members. For volunteers, additional group opportunities were provided to express their views only to the independent consultants.
2. The External Relations Unit was not included in the review TOR. This limited the opportunity to reflect the integrated nature of VSA's approach to development which includes substantive work on development education in New Zealand and utilises the knowledge, skills and experience of returned volunteers. It may also inadvertently convey the impression that VSA's work consists mainly of volunteer sending, and that it is this that most interests NZAID, rather than placing it in context with the New Zealand-based work.
3. The timeframe for the review, whilst adequate for the two country case studies, was inadequate to triangulate findings from countries other than Cambodia and Vanuatu. The extent to which findings can be generalised is therefore questionable and VSA staff expressed this concern during debriefing. Although Africa had been deliberately not selected as a case study there was disappointment that the report did not make more reference to those countries and to the differences between the Africa programme and the other programmes.

3.3 Method and Process

The process of the review took place in three phases: two weeks in Wellington undertaking documentary review and conducting interviews with staff of VSA and NZAID, returned volunteers and other key stakeholders; one week field visits to Cambodia and Vanuatu, restricted to the capital city; and a period of analysis and writing.

The case study countries, Cambodia and Vanuatu, were pre-selected jointly by VSA and NZAID according to internal criteria. The review team had limited time and resources but aimed to broaden the findings by undertaking 'mini' case studies which would provide additional country evidence and would support generalisation of the findings. Vietnam and Bougainville were selected because there were existing documentary sources of learning initiated by VSA which could be 'showcased'. The partnership conferences held in Africa were also discussed with VSA as a special topic even though Africa had been excluded as a case study. Although this yielded very useful information it also led to criticism from NZAID during de-briefing that discussion of Africa had been partial. In addition it was envisaged that working in post conflict countries might present specific challenges to VSA so Solomon Islands was also identified as a mini case study. A limited degree of triangulation of findings was attempted by comparing the findings of field work

with the experience (Bhutan, Laos, PNG, Timor Leste) of the accompanying VSA Programme Officers and the one based in Cambodia.

Methods were predominantly qualitative. Semi-structured interviews were conducted in person, by telephone and email using a specific set of open-ended questions for staff, volunteers, partners and other stakeholders within a common format covering the focus areas. Within VSA, in addition to individual interviews, the Programme Officers and Programme Managers were also interviewed in groups in order to stimulate interactive discussion around the questions. Within NZAID, in addition to a selection of staff with current responsibilities relating to VSA, a focus group meeting was held with the aim of drawing on the range of staff who had particular experience of VSA even if they were not currently in working relationships. Although this was poorly attended it served to demonstrate one of the key findings very clearly. A small number of returned volunteers were selected (on the basis of recent experience and availability for telephone or personal interview) for limited discussion on the topic of learning in order to ensure that the volunteer, as well as VSA staff, perspective was heard.

During field work interviews were conducted with more volunteers and partners than had originally been determined by VSA and NZAID in order to broaden the experience drawn on and ensure that all volunteers in country were given voice even if their assignment had not been selected. Whilst several volunteers were recent arrivals in country, and therefore could be considered unrepresentative, interviewing them gave detailed insight into the pre-departure briefing process and highlighted the gap between assignment description and actual position. A specific process was developed for interviews with both volunteers and partners, and amended after trialling, in which the independent team members asked the same questions to all interviewees and then provided the opportunity for the NZAID and VSA team members to ask additional questions to meet their own needs for information and learning. At the end of each day all team members reviewed the interviews in a structured manner and a wrap-up session was held on the final night in each country. In depth discussion about best practice in volunteering was also held between team members and NZAID and VSA staff during field work.

In Wellington the independent team members worked from the VSA office and used the opportunity to feed back findings from the case studies and other interviews in order to promote further discussion and triangulation, and to enhance the quality of analysis.

In drawing conclusions the team was aware that the two chosen case studies may not be representative of other programmes and this became the subject of discussions after the First Draft of the report. Where Cambodia and Vanuatu were perceived to be potentially different they are named. Otherwise the authors believe that the conclusions are generalisable.

4 Findings

4.1 Development Effectiveness

The Review was asked to consider the effectiveness of VSA's processes for ensuring a developmental approach to volunteer placement that contributes to community development and poverty alleviation.

4.1.1 Strategy and Intent

During the period of review VSA was working to the Strategic Plan (2003-06) and, latterly, to a new Strategic Intent (2007-11). The new Intent is already being effectively implemented with full ownership of staff unlike the earlier Plan which was perceived to have been developed largely by the Governing Council and without adequate staff participation.

Over the years VSA has come to think of itself as a development agency rather than a volunteer sending agency and the Strategic Intent is explicit about this in stating '*our Strategic Intent builds on VSA's 45 year history as an international development agency*'. This has significant implications for development effectiveness.

The tables below outline the elements of both Plan and Intent which are most relevant for the Review.

Selected Statements from the Strategic Plan (2003-06)

Priority Outcomes

VSA has high quality international programmes focused on achieving its goals

VSA functions through strong and positive relationships with overseas-based volunteers, partners and other development organisations

Key Objectives

- high quality assignments which work towards development objectives negotiated with partners
- ensure partners recognise VSA as a quality provider of skilled volunteers
- ensure volunteers personal and professional needs are met
- develop and strengthen relationships with partners
- develop and strengthen relationships with sister agencies and other international development organisations overseas

As a purpose for VSA the Strategic Plan states that '*VSA exists so that partner communities and volunteers achieve sustainable wellbeing and mutual understanding through effective development*'. Sustainable wellbeing encompassed the element of poverty reduction and effective development was concerned with maximising the benefits for partners within the human and financial resources available. Mutual understanding

incorporated the notion of sustainable and effective partnerships. In addition to the priority outcomes in the table, other outcomes related to the effectiveness of VSA as an organisation and increased awareness in New Zealand.

Whilst the definition of development in the Strategic Plan is somewhat vague, one of its strengths was that the key objectives set were realistic. In moving to the new Strategic Intent the concept of development has changed to focus on improving quality of life, and building self-determining communities and stable nations. The table below states VSA's current intentions in full. Although only the development intention is directly relevant to the Review (and this is a stated limitation of the Review) it is important to recognise the other intentions of development education and volunteering because, together, they represent the holistic nature of VSA's approach. They also show the breadth and depth of the challenge VSA is setting itself.

Selected Statements from the Strategic Intent 2007-11

Intentions

Development

NZ volunteers, partners and communities abroad share skills and knowledge to help improve quality of life and build self-determining communities and stable nations

Development Education

New Zealanders understand their role in international development and participate as good neighbours in the global community

Volunteering

NZers appreciate and support international volunteering for development

We Will:

- harmonise our programmes with the development strategies of country governments
- deliver volunteer programmes that address key development needs
- deepen and strengthen relationships with development partners
- recognise and develop the special relationship with NZAID
- share achievements and learning
- increase our development education work
- support returned volunteers, branch members and staff to actively use insights and experience
- create more experiences for more NZers to deepen their understanding of development and provide opportunities to make positive difference
- contribute to international best practice on volunteering
- work to make volunteering easier for NZers
- form new partnerships with NZ communities and organisations
- build wider support for volunteering

Although the Review is asked to consider the extent to which VSA's developmental approach contributes to community development and poverty alleviation, this is not the language used by VSA itself as can be seen from the above tables. Other than referencing the *Strategic Framework for Relations between NGOs and NZAID*, which states that NZAID and NGOs share the common goals of reducing poverty and promoting sustainable development, in the Comprehensive Funding Arrangement the terms 'poverty alleviation' and 'community development' do not appear as such. This absence of common language and definition provides a challenge for the Review team to define the basis on which VSA's development effectiveness can be evaluated.

For this reason the 2005 Paris Declaration¹ is used as a reference point. This has become a major guiding force for greater aid and development effectiveness in which donor governments have pledged to align with the anti-poverty agenda of partner governments and to harmonise their efforts with other donors. Since VSA states in its Strategic Intent that it will harmonise its programmes with the development strategies of country governments, and the Comprehensive Funding Arrangement talks about alignment between VSA and NZAID, it is useful to discuss VSA's development effectiveness in the context of a global, defining and important trend. At the same time it is fully recognised that, although the New Zealand Government is a signatory to the Paris Declaration, the Declaration is a high-level statement and has not been used specifically in discussions or contractual arrangements between NZAID and VSA.

4.1.2 Responding to Partner Needs

Since the 1998 review VSA has undergone significant and positive change, guided by two CEOs and several consecutive strategic plans. These plans show a significant progression in clarity of purpose, intended outcomes, and ways to monitor and learn. During this period VSA has professionalized, and continues to do so, across all units in order to be more effective. This means that the processes by which VSA recruits and sends volunteers are now highly refined and based on years of experience. Planning processes are sound and VSA has met all its reporting obligations to NZAID on time and to an appropriate standard. At central level in Wellington, therefore, it is possible that VSA has gone as far as is appropriate in refining processes that relate to volunteer sending.

Volunteer Sending v Development Organisation

In terms of how VSA responds to and addresses the needs of partners it is important to note the history of VSA as a volunteer sending organisation. In that model, the volunteer is at the centre and, whilst considerable attempts are made to understand and meet partner needs, all processes are designed and improved for the purpose of sending volunteers. To that extent all volunteer sending organisations have faced criticism about providing a supply-led service.

In a development model, the partner is at the centre of the development challenge. The Paris Declaration was arrived at after decades in which donors had attempted to determine development goals but have now placed partner governments firmly at the centre. For NGOs such as VSA there is also increasing recognition that it is the policies and programmes of governments that will make a significant difference to reducing poverty. The implication of this is that it is likely to be more effective to work with partners who work in the context of their government's anti-poverty agenda. This does not mean that NGOs necessarily support the government, and there is plenty of scope for

¹ Paris Declaration on Aid Effectiveness: High Level Forum, 2005. OECD/DAC www.oecd.org

challenging policy and advocacy work, but the development goals are similar and complementary.

In its transition from volunteer sending to development agency VSA is necessarily, then, operating in two modes. In the cases where good development is happening, an assignment is well scoped through a full and participatory process with partners, an appropriately qualified volunteer is identified, and skills are shared in both directions. In other cases, VSA continues to be in volunteer sending mode in which assignments are supply driven, less-thoroughly scoped than they could be, and are not linked to government policies and programmes.

Country Strategies

Although VSA has condensed country strategies from the previous versions, which now provide concise and focused information, the present strategies are so broad that almost all requests can be accommodated and the criteria are insufficiently detailed for selecting or rejecting requests. For a small agency with limited resources it is necessary to undertake further analysis of the needs that VSA can effectively respond to based, among other things, on its mandate, the interests of Council, and the recruitability of volunteers.

In Cambodia, for example, the VSA programme is currently fragmented with 10 volunteers (including two UniVols), working in five NGOs and in the Royal University of Cambodia. There is little analysis of the development context in country and subsequently a weak strategy that makes almost any kind of assignment possible and does not allow focused partnerships. Given that Cambodia has a huge international community and hundreds of NGOs this is a major challenge in terms of making choices about which partners to work with and how to move beyond a disparate bag of assignments.

One result of VSA's successful history of volunteer sending, along with strategies that make most things possible, is that it can appear to be responding in a rather ad hoc way to requests. Where VSA has no in-country presence, and where there is a need to demonstrate numbers to the donor, it is possible that VSA is remaining involved with partners for longer than is desirable because criteria for discontinuing support are not set. These points are recognised in VSA and efforts are well underway to improve.

Scoping Assignments

The scoping of assignments is variable in quality and was one of the main concerns of those volunteers interviewed (both returned and current) and of several NZAID staff. Few were working to the original assignment description (AD) and several had found them inappropriate from the outset even though they had been developed only months before. Some change to the AD had been expected by the volunteers (and flagged by VSA during briefing) but the extent of necessary change was perceived to be a reflection of weak scoping processes. Programme staff at VSA are responsible for developing the AD either with established or new partners but in practice volunteers sometimes find

themselves in the position of scoping assignments for their successors or for other roles within the organisation. In some cases they identify assignments for other organisations they come into contact with or for their accompanying partners. Programme staff recognise this is not desirable as a method of scoping and undertake associated checks and balances when on field trips.

Development Practice

Representation of VSA in 12 locations in the field reflects a mix of Programme Officers, a Field Representative, Field Officer and contracted Consultant, and Field Administrators. Of these staff, those with international development experience are mostly based in Wellington rather than in-country. The presence of locally-recruited staff in some locations is an advantage in terms of communication with partners and local networking, but their role is not generally to drive forward the development debate, and cultural mores and hierarchies may make it difficult to engage effectively with partners and other stakeholders.

For some volunteer agencies and development agencies, including donors such as NZAID, the trend is towards a decentralised in-country presence recognising that partnerships cannot be built at distance, if the harmonisation and alignment agendas are to be realised. In Vanuatu, NZAID, partners and volunteers all observed that VSA's lack of presence on the ground limits the development of partnerships of depth. At this stage of VSA's development it is possible that being so headquarters-focused may have the effect of centralising improvements in Wellington rather than in country.

Now that staff with good development experience are being recruited there is greater capability to engage partners in in-depth discussion about their needs and priorities and to challenge assumptions in the spirit of partnership. However, some staff still revert to providing mostly practical and pastoral support to volunteers and this can easily crowd out time for improving the quality of VSA's relationship with partners. Partners also vary widely in their understanding of and capability to engage in development dialogue. With strengths and weaknesses on both sides, this results in relationships between VSA staff and partners that vary greatly in quality and effectiveness.

Within VSA, especially since 2005, there has been an ongoing effort to introduce better and stronger development practices and this is changing the way that the Programme Officers approach their work and how they see partnerships. Many issues arise during development of the assignment description but, while this is an important document for VSA and volunteers as it forms the basis of recruitment, it tends not to be a priority for partners. Some efforts have been made to improve relationships with partners by increasing partners' understanding of VSA. However, there is increasing awareness that the focus should be on the needs of the partner rather than the needs of VSA. Time spent with partners, because of distance, can be very intense and does not always lend itself to mutual understanding and accountability. Staff are also learning to be more honest with partners about the recruitability of certain types of volunteers.

Partners at the Centre

There are continuing efforts to improve relationships between the different units in VSA so that time frames for identifying assignments, recruiting and sending are minimised. At present partners find the time period very long, even when they have been informed how long it will take, and they say that it is like sending a funding proposal to donors in which, after a certain period of time, they assume that nothing is happening.

The Africa Partner Conferences are an innovation in VSA that genuinely seek to put partner needs and priorities at the centre. Although the MEF allows for staff to undertake case studies the Africa Programme Manager was cautious about their applicability to partners as the ownership lay with VSA. Partners had not found the previous monitoring regime useful and felt that reports were oriented to the needs of VSA rather than their own. Bringing partners together enabled them to discuss and articulate issues as a group rather than as individuals. As planned, a positive outcome was that as partners met together with other organisations hosting volunteers, they were able to form networks for future support.

A sound development approach requires a niche strategy for each country, based on the needs of the country and the particular context. Because VSA is a small organisation with limited resources to undertake detailed analysis it is likely to be beneficial to work more closely with the other volunteer agencies or NZAID and to work only with partners whose own work is complementary to government policy. Volunteer assignments in the Vietnam health sector and Solomon Islands legal sector are examples of moves towards this. The desire to also 'respond to need', in the sense of the complementary approach and advantage of NGOs that is recognised in NZAID's *Strategic Framework*, has both advantages and disadvantages. In the best case scenario it means that VSA genuinely can respond to needs that other agencies may not be able to. However, at worst, it can also mean that VSA will do anything, including respond to needs that other agencies have assessed as inappropriate or to needs identified by accompanying partners of volunteers as job opportunities for themselves, or to eliciting demand for volunteers from a supply-led perspective.

4.1.3 Capacity building

The partnership between volunteers and the partners they work with is at the heart of what VSA aims to achieve. It is formed through working together daily and attempting to resolve difficult issues as they arise and in context. At country programme level there appears to be some excellent work being done by volunteers with most seeing capacity building as their main role and one they take very seriously. Partners and other stakeholders are generally impressed with the quality of the volunteers especially those who are older and who bring years of experience and maturity. This was often noted in comparison with other volunteer agencies which have a much younger cadre.

Individual staff in partner organisations spoke convincingly and powerfully of the personal benefits they had received by working with the volunteer, in particular confidence, changed attitudes to work and vision to do things differently. These are the sorts of skills inspired through coaching and mentoring relationships and, along with social capital outcomes, are typically difficult to measure. Annex III discusses the issues involved in measuring social capital.

Volunteers in Cambodia and Vanuatu mostly understood their role in supporting capacity building and were realistic about any impact they may have. Generally those volunteers in NGOs appeared to have greater job satisfaction than those in government departments, who sometimes face considerable frustration and tend to argue against such placements. However when talking through the issues during focus group discussions, they articulated the importance of working with government in spite of the challenges. Those volunteers in the NGO sector, especially in Cambodia where the proliferation of NGOs is problematic, also appreciated that NGOs were not a panacea and that strong and effective government was what would make a difference to poor people's lives.

Volunteers as Technical Assistance

Essentially volunteering is a form of technical assistance (TA) which is a common mode of aid delivery for most donors. VSA, in common with other volunteering agencies and NGOs, states that volunteers are unique in that, as well as providing TA, they live and work in the community on locally appropriate salaries. Whilst this is true in some cases, many volunteers also live in urban centres and live a typically expatriate lifestyle, albeit on a lower income. Some older volunteers also subsidise their standard of living from savings. These variations reflect a changing world and a changing context of volunteering. The important point is that VSA may be continuing to see volunteers as fundamentally different from more highly paid TA when in many cases there are more similarities than differences. Some consultants spend years in a particular country and may have been volunteers or NGO staff themselves so the values and lifestyle choices can be the same.

VSA therefore faces many of the same challenges in supplying and managing volunteers as other agencies or companies do in supplying and managing more highly paid consultants. Expectations of TA in general tend to be over-ambitious and its actual effectiveness in influencing change and capacity development is often determined by the characteristics of the organisation and institutional environment within which it is located rather than the quality of inputs. TA also tends to address multiple objectives such as gap filling and watchdog as well as the stated aim of capacity building and there is usually a lack of clarity over what is intended or expected, in whom and over what timeframe, how sustainably, and with what impact on performance. The OECD DAC Guidelines for Technical Cooperation (1991) noted that, without local ownership and strategic management, technical co-operation from donors is too fragmented to create sustainable

² This is an old term, reflecting the era of technical advice. It is still widely used but generally refers to assistance provided through advisors, whether technical or more generic, and where the main objective is capacity building

systemic capacities in developing countries and may even prevent the emergence of sustainable local capacities. This applies equally to capacity building support provided by VSA and other volunteer organisation through volunteers.

In traditional volunteering situations, where the volunteer was based in remote or rural areas, the effectiveness question was less critical. However, particularly in post-conflict countries such as Solomon Islands or Timor-Leste where there is a proliferation of consultant TA of varying lengths and capabilities, it is important for VSA to position itself. In Solomon Islands, for example, there has been a longstanding commitment to provide legal advisers at provincial level. Now that there are many players on the scene, and the environment is increasingly politicised, there needs to be an assessment of whether it remains appropriate to place volunteers at that level without the support of broader donor-funded projects, such as UNDP or within RAMSI, which are able to provide more resources and peer support networks. Past volunteer experience has been mixed, but there is a sense among volunteers that VSA continues to replace them even when they recommend otherwise. Rather than undertaking a fundamental reassessment of the roles volunteers can play in Solomon Islands in the present circumstances there may be a tendency to continue a historic relationship even though circumstances have changed. NZAID in Solomon Islands has noted a concern with the scoping of assignments in this regard.

Development Support to Volunteers

At this stage, the volunteers interviewed all felt that they would draw on their own professional resources rather than seek advice from VSA. After the initial pre-departure briefing, VSA does not provide significant development-oriented support and volunteers are expected to maintain their own, mostly New Zealand-based, peer networks once they are established in their assignments. Whilst this has value, advice provided may reflect the New Zealand perspective and New Zealand solutions rather than a more appropriate solution based on development experience and adaptation locally to meet particular needs in particular circumstances (see also 4.3.2: Learning). There is therefore a gap in VSA's ability to meet the needs of volunteers in-country as the organisation changes emphasis from volunteer sending, in which practical support is the most important, to development, in which development knowledge and experience is what will be most valued.

4.1.4 Impact

There is strong anecdotal evidence that VSA volunteers contribute to changes in individual performance and attitudes by acting as good role models and being a continuing source of motivation and support. *Measuring* their impact is more difficult. It is almost impossible to attribute capacity development or change to individual inputs because there are so many other variables in the organisational and institutional environment. The value and sustainability of outcomes also depends on depth and breadth of engagement and contributions by many stakeholders. Therefore, whilst VSA is sincerely engaged in attempting to measure and record impact, at present it is unknown

whether impacts from either single volunteers or a series of volunteers has impact on individuals and their organisation. Whether they can, in addition, have impact on beneficiaries is even less certain and, in most cases, volunteers do not work directly with beneficiaries and VSA does not claim any impact.

Some volunteers may have an impact in the community which is outside their assigned role and which is responsive to opportunity. The *Rebuilding Bougainville* case study talks about a contribution to social capital resulting from the social contacts of volunteers that do not directly relate to formal objectives of assignments. VSA also suggests that in the context of recovery from conflict, volunteers have assisted in rebuilding trust after division between individuals, families, communities and institutions in Bougainville. VSA is also supporting the ongoing qualitative research work of John Schischka in Vanuatu which may increase understanding of the impact of volunteering on social capital, in this case as it relates to the parents of pre-schoolers (see also 4.3.2: Learning)

Whilst these are valuable attempts, and demonstrate VSA's desire to show impact, at this stage they remain predominantly anecdotal and are not sufficient in themselves to prove impact or to generalise beyond specific individuals or situations. Social capital is a particularly difficult concept to tie down (see Annex III).

In a few cases it is also possible that there is negative impact, for example if the presence of a volunteer replaces a local staff member or if the relationship continues beyond the point that it is useful. Two former volunteers with the Pri Skul Asosiesen Blong Vanuatu firmly believed that PSABV was capable of undertaking the work itself and that the limitation was a budget to employ local staff rather than a capacity deficit.

An important limiting factor to VSA having impact beyond that of individual volunteers is the lack of a developmentally experienced in-country presence. Most organisations, including other volunteer sending organisations such as VSO (Voluntary Service Overseas, UK) are seeking to make their programmes more focused and aligned with government anti-poverty strategies and harmonised with other donors. It seems unlikely that VSA can become as effective a player as it could be without a presence in-country. In addition to improved partnerships with government and NGO partners an in-country presence could facilitate greater learning and networking between volunteers and between the organisations volunteers are placed with. Volunteers in Cambodia and Vanuatu are not formally networked with each other at country level, in the latter because there is no representative and in the former because the focus has been on practical support rather than on establishing a development dialogue. At present the capacity building role of VSA tends to be practiced by the volunteers and the role of VSA's New Zealand and locally recruited staff is under-developed.

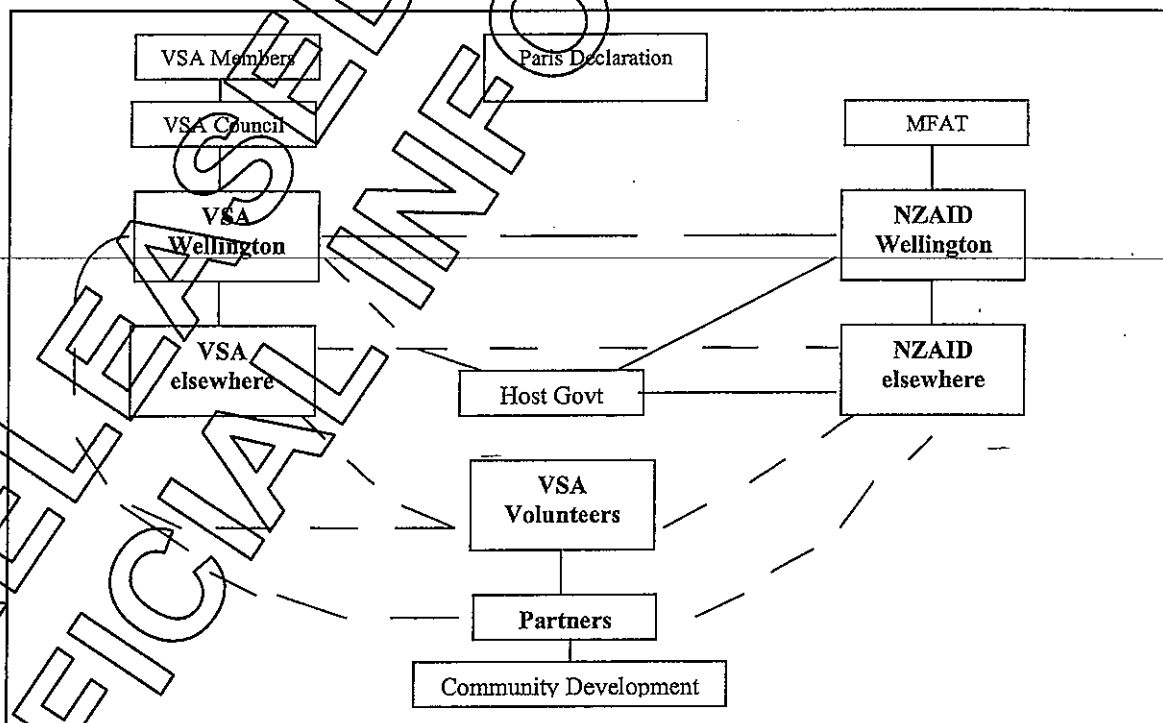
In terms of improving impact it is clear that VSA, from its NGO perspective, has intentions that are compatible with those articulated in the Paris Declaration: ownership; harmonisation; alignment; results; accountability. The challenge for both governments and grass roots is to contribute in a more cohesive and meaningful way to poverty eradication. For a small agency such as VSA, spread thinly across a number of countries,

the rationale for becoming a development agency is intangible to some stakeholders, including within NZAID. Most donors and NGOs have, over the years, moved to the idea of 'fewer, deeper, longer' and, if VSA is to focus its efforts in order to achieve impact, it will need to continue to do less but do it with greater depth and for a longer period. The movement towards this has been started, for example by the reduction of country programmes in Pacific, by committing to long-term partnerships as in Vanuatu, and by focussing on the health sector in Vietnam. Caution is also being practised in relation to a new programme in Indonesia in order to establish exactly what value VSA can add. To take this further now means identifying what it is that VSA does well and targeting the countries and niche areas into which efforts can best be focused.

4.2 Partnership with NZAID

The relationship between NZAID and VSA is often articulated as if it was one single entity. In reality, as shown in Diagram 1 below, there is a complex web of connections, many taking place at distance, between VSA and NZAID, between VSA and partners, and within VSA itself. In addition VSA is affected by internal relationships within NZAID.

Diagram 1: Present relationships between VSA, NZAID and Partners



The quality of relationships within and between organisations is crucial for organisation performance. Eyban³ observes that, in exploring relationships, it is not helpful to think in terms of a binary system of donors and recipients because most organisations are both givers and receivers of aid within a chain of money flowing from taxpayers to governments to aid agencies to NGOs and beyond. She also notes the complexity and diversity of networks and connections of power between the plethora of organisations involved in aid. This is relevant to VSA since it is a recipient of NZAID funding and a donor of technical assistance through the volunteer. Because VSA is involved in a web of relationships that are being continuously shaped and reformed, through interaction with each other, the effect of any particular action on the process of change is unpredictable.

In the diagram the strongest *relationship* is between VSA and NZAID in Wellington although this is represented by a broken rather than a solid line because it is not yet a full partnership. The only real *partnership* is that between volunteers and VSA's partners, which is appropriate if VSA is to genuinely meet the needs and priorities of partners. Broken lines indicate relationships rather than partnerships at this stage. For the purpose of this discussion the reviewers are defining a relationship as a connection between organisations or individuals which is characterised by convenience or necessity. In contrast, a partnership is characterised by close cooperation between parties with clearly defined joint rights and responsibilities.

4.2.1 Relationships between VSA and NZAID

4.2.1.1 Wellington Level

At the Wellington level the relationship between VSA and NZAID is defined by two key documents. The *Strategic Framework for Relations between NZAID and New Zealand NGOs* recognises and supports the independence of NGOs, irrespective of any funding relationship. This principle is also enshrined in the *Comprehensive Funding Arrangement between NZAID and VSA (2003-07)* which has, as key elements of the funding relationship: congruence of organisational goals and objectives; regular interaction for the purpose of sharing information; joint assessment of progress; accountability, mutual respect and transparency; and independence, partnership and cooperation. At the overarching level there is no mention of alignment. However, where VSA's in-country costs are met by NZAID bilateral programmes, it is stated that VSA and NZAID will work to coordinate and align programme objectives.

Although in-country costs cannot be greater than 20% of total NZAID funding to VSA, discussion around them has come to define, and perhaps dominate, discussions at Wellington level. While VSA has support in NZAID, there are some staff who hold strong views about VSA and who resent the special relationship VSA is perceived to have with NZAID above other NGOs that need to contest funding. Because in-country costs have had to be negotiated on a country by country basis they have provided a platform for some NZAID staff to argue for full alignment and have distorted the broader issues of coherence between all VSA and NZAID programmes. Thus, whilst it is likely to

³ *Relationships for Aid*. Eyben, R. (Education). Earthscan 2006

be more effective for VSA to increase alignment with NZAID the reason for, and means of, engagement have often become contentious and dominated by different agendas from those enshrined in the Framework and Funding Arrangement.

Responsibility for managing the relationship between VSA and NZAID rests with the NZAID Development Programme Manager (DPM) for Civil Society in the Global Group (AIDGLO), where there is senior level understanding of and support for VSA. In the much larger Pacific Group (AIDPAC) the relationship with VSA has been perceived to be centralised in AIDGLO rather than managed across the whole of NZAID. Relationships between AIDPAC and VSA have tended to be 'by fortune rather than systematic' and there has been patchy attendance by AIDPAC DPMs in the regular meetings held between VSA and NZAID. Several staff felt that the main reason for this is the rapid growth in NZAID and the tendency for urgent activities to crowd out the important.

Deepening a relationship with VSA has, for most of the NZAID staff interviewed, not been a priority. In AIDPAC there has been resentment about funding VSA in-country costs as they have been perceived to be drawing funds away from the bilateral programmes. Furthermore, government to government links are strong in AIDPAC and there has been a major move towards sector approaches rather than traditional projects. This is not a policy arena VSA has significant experience in.

The Funding Arrangement provides for six-monthly meetings in Wellington to discuss funding and annual reporting and these have usually taken place according to schedule, so difficulties in establishing relationships are not structural. However, the intent to move beyond general information-sharing into strategic programming and broader development issues has not taken place to the extent desirable if relationships are to move into genuine partnerships. At present the desire to deepen the partnership through in-depth development dialogue appears to be stronger on VSA's side. On NZAID's side the barriers are a combination of lack of interest, lack of time and lack of a compelling policy-driven reason.

4.2.1.2 Between VSA Staff and NZAID outside Wellington

Relationships between VSA country programme staff (based either in country or in Wellington) and NZAID staff (based in country or regionally) tend to be individual rather than institutional, as there is no organisational structure to support them. NZAID officers and VSA staff are nowhere in the same location which provides a barrier to communication and coordination. Although VSA staff are generally good at ensuring that they keep NZAID Posts informed and usually meet with them when in country, the formality and frequency of contact is insufficient to have an impact in building programme synergies. In the case of Vietnam it was unfortunate that VSA withdrew its Programme Officer at the same time as NZAID decentralised from Wellington to Hanoi. In some cases VSA meets with the High Commission or Embassy rather than NZAID directly which can result in NZAID feeling marginalised.

Relations at country level are also affected by an imbalance in country specific knowledge. NZAID, with its greater resource base, has more sophisticated analyses and country strategies, and has solid relationships with partner governments and other donors, particularly in the Pacific. The presence of locally-recruited VSA staff in some locations is an advantage in terms of communication with partners and local networking, but they have, to date, tended to have limited development experience and their role is not generally to drive forward the development debate or foster the relationship with NZAID. Where there are local staff, cultural mores and hierarchies may make it difficult to engage effectively with partners and other stakeholders. It is not clear whether VSA has a rationale for having an expatriate field officer based in-country or whether their presence or absence reflects historical or ad hoc reasons.

There are major advantages in having a 'developmental' country presence and both NZAID Managers in country and VSA staff stress the need to have the finger on the pulse. This allows greater responsiveness based on understanding of the local issues and more opportunities to build relationships of trust with NGOs, government partners, local leadership and communities. In many cultures it is difficult to have effective communication by email or telephone and long distance relationships are no substitute for on the ground presence.

For both VSA and NZAID the calibre of staff is critical and is a determining factor in increasing impact through coordination. Attempts to coordinate exist in both directions to a greater or lesser degree but there are differing views about which agency needs to drive coordination, and on what basis, along with sensitivity to the issue of NGO independence. In Cambodia the relationship between NZAID (based regionally in Bangkok) and VSA (based in Phnom Penh) is weak and there are frustrations on both sides in Wellington that understanding is weak at country level on either side about the other's programme or intention.

In Vietnam, where NZAID is developing its country strategy there is some frustration that, while NZAID staff at Post believes that it has kept VSA fully informed in line with its responsibility under the Strategic Framework, VSA has to date developed its priorities unilaterally in Binh Dinh province with little reference to NZAID. Similarly the VSA Review of the Health Sector took place with communication essentially at the Wellington end. NZAID at Post did not receive a draft report and felt that there were several inaccuracies which could have been dealt with had there been closer collaboration throughout the process. The NZAID perception in Vietnam is also that VSA is overly influenced by individuals (local from Binh Dinh, VSA staff or current and returned volunteers), rather than by the institutional objectives of the government partner, and responses to requests for assistance are seen to be based on subjective rather than objective criteria. NZAID and VSA are now engaging in a more positive dialogue in Vietnam.

In Vanuatu NZAID has six staff at Post but VSA has no staff in-country. Comments were made to the Review team in-country both by NZAID at Post and by partners that VSA

cannot make or sustain real partnerships without having a person on the ground. Additionally VSA has little profile and potential partners may not know they are there or what assistance they can ask for. Relations between NZAID and VSA in-country are collegial but they are informal and without structure, based on Programme Officer visits from Wellington. NZAID has no instructions to carry out any particular responsibilities for VSA over and above some routine consular activities. NZAID works more closely with Peace Corps and VSO because they are focusing in the same sectors, while VSA's placements were described to the reviewers as ad hoc. This was a surprising finding, given that both organisations' strategic plans contain statements of mutual support and alignment, and is perhaps indicative of the informal nature of the relationship. Although VSA has a long standing relationship with the Pni-Skui Asosiesen Blong Vanuatu, some stakeholders question whether the relationship may have outlived its usefulness.

4.2.1.3 Between Volunteers in country and NZAID

Where both volunteers and NZAID are in country (Vietnam, Vanuatu, PNG, Solomon Islands, Timor-Leste, South Africa) there are some personal relationships but no structural link and generally neither side has much knowledge of what the other is doing. Newly arrived volunteers appear to have greater interest in representing New Zealand and appreciate links with other New Zealanders but, over a period of time, they immerse themselves in their job and communities and identify more closely with the partner and country than with New Zealand. Whilst the two High Commissioners interviewed (Vanuatu and former Solomon Islands) were each very supportive of VSA volunteers and the work they were doing, and both discuss local conditions with volunteers throughout the country, one expressed greater caution regarding the need to avoid compromising their non-governmental status, particularly those volunteers that work in government departments.

4.2.2 Relations within NZAID

There is acknowledgement within NZAID that some staff hold strong positive or negative views about VSA and its perceived privileged status with NZAID compared with other development NGOs. This view is at odds with policy in the Strategic Framework, but it is important because, where staff hold such views and are in a decision-making position related to in-country costs, the basis on which NZAID and VSA engage has the potential to be antagonistic.

AIDPAC has limited ownership of the relationship with VSA which is seen to be the domain of AIDGLO. The appointment of a liaison person in AIDPAC, who was the main point of contact with the NZAID Civil Society DPM in AIDGLO, had the positive effect of encouraging active communication and resolving some longstanding grievances which had previously affected decision making. This role was much appreciated by VSA. Other benefits of the role included learning and sharing experiences and ideas between

countries. Relations were further improved when funding was taken out of bilateral programmes because DPMs felt less pressurised and more able to engage with VSA on real issues without the discussions being dominated by funding. However, the role also had disadvantages in that it created an additional tier of decision making and was insufficiently resourced to allow full consultation with and input by DPMs into VSA Annual Programme Plans. It also absolved DPMs from full responsibility for developing relationships with VSA and potentially duplicated the role of the Civil Society DPM.

Now that the role has lapsed it will be difficult for the Civil Society Manager in AIDGLO to establish direct relationships with the DPMs in AIDPAC. There are too many individuals to communicate with and effective communication requires a depth of knowledge of the Pacific programme which is difficult for personnel in another division to gain.

Given the range of opinions about VSA, and the ad hoc nature of relations with VSA outside Wellington, the issue for NZAID is about how to ensure that the policy enshrined in the Strategic Framework is operationalised, especially at country level.

4.2.3 Implications for Partnership

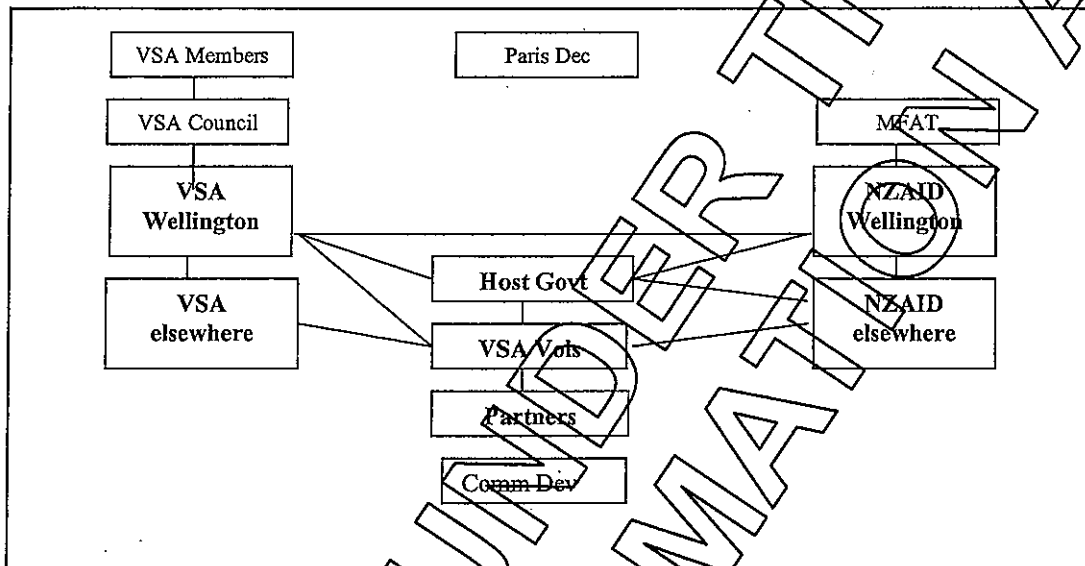
In analysing partnerships the purpose is to answer two of the key Review questions about VSA's implementation of a development approach, and the effectiveness of current communication and coordination between the two organisations.

VSA is involved in a number of related but different relationships, most of which do not yet amount to partnerships because they lack joint clarity of purpose. Partnerships would be represented by solid lines as shown in Diagram 2 below.

The Strategic Framework and Funding Arrangement, in enshrining the independence of NGOs, acknowledges VSA's right to deploy volunteers in the countries and sectors of its choosing. This is important and valued by both NZAID and VSA but a consequence is that it complicates and has the potential to confuse the dialogue about partnership between NZAID and VSA and, in particular, the question of alignment.

For some NZAID officers at Post the question of 'non-core bilateral funding' has been a major issue. There have been unresolved questions about how appropriate it is for NZAID to fund all the costs of volunteers in some countries with no or minimal contribution from the partner, and what the impact of this is on assignments, partner commitment and VSA's own accountability. This issue was also of concern to the Review team but, during the course of the Review, the funding arrangement was changed to allow the budget line for NGOs to come out of AIDGLO and be flexible enough to move between countries according to need. This will be highly beneficial for VSA but it has removed one of the main reasons for engagement with AIDPAC.

Diagram 2: Partnerships



In the current structure, and with current relationships, it is difficult to identify real incentives for VSA to align with NZAID. As described in the Framework, the complementarity of NGO work to that of governments means that VSA is free to pursue its own direction either in different countries from NZAID, or in the same ones but in different sectors. To date this has worked satisfactorily. It is only when development effectiveness is considered that the drivers for alignment are clear.

As a volunteer-sending agency VSA has been able to impact in a small but tangible way, as volunteers coach and mentor individuals, predominantly in NGOs. At the same time there has long been recognition internationally that what volunteers actually did was somewhat fluid and that it often amounted to capacity 'lending' rather than capacity 'building'. For those reasons, over the years, VSA has sought to move to an organisation that sends volunteers 'for development' rather than for individual gain. In this respect VSA has done an excellent job of articulating new goals and managing a process of change in new directions. During the period of this review (2003-07) change management has been prioritised by the current CEO and there is considerable evidence of improved systems, more appropriate learning (see 4.3) and greater accountability (see 4.4).

4.2.4 The Comprehensive Funding Arrangement

The current Funding Arrangement has been, for both NZAID and VSA, a great improvement on the previous versions. It is easy to understand in principle and allows, appropriately, for the detail to emerge in the Annual Planning process. Significantly

revised in 1999-2000, and subsequently updated, it is a permissive document to the extent that it permits a range of possibilities and does not limit VSA. The only exception was in the In-Country Costs, which has complicated partnership development, but that has been changed as of April 2007 and will therefore not be an issue in the next FA. Reporting requirements are clear and the present CEO has revised the format so that reports are shorter and contain only essential detail. This has been accepted by NZAID and the result is readable and relevant reporting.

Recognising that, in line with the Strategic Framework, VSA is an independent NGO and noting that there are few incentives at present for greater alignment with NZAID, the key issue which faces NZAID and VSA is the purpose and nature of the relationship. The purpose of the FA states that funding is provided "on the basis of shared strategic goals and objectives" and one of the key elements is "congruence of organisational goals, objectives and priorities". Such a purpose would be acceptable if both parties were happy with it but it has become clear during the review that this is not the case. Many of the NZAID staff who participated in the review felt that VSA is not sufficiently congruent with NZAID at country level where each are in the same country. And there is a sense within VSA that they would like a deeper, but unspecified, partnership with NZAID.

In the 2007-2011 Strategic Intent, VSA has committed to harmonising activities alongside national government strategies. It may also be useful to consider a degree of commitment to harmonisation with NZAID. This could be a commitment in principle and would need to be experimental. VSA, as noted in this Review, is a learning and changing organisation and that is a process that happens slowly over many years. The choice of countries that VSA works in depends on a range of factors including historical relationships, Council preferences, requests from MFAT, recruitability of volunteers, and perception of the New Zealand public.

Therefore a way forward might be to select one or two countries as experiments in harmonisation over the period of the next FA and monitor that carefully before deciding whether to proceed or revert to current practice. Appropriate countries would be those with an NZAID Post in-country such as Solomon Islands, Vietnam, PNG, or Vanuatu. Solomon Islands would be a good choice because of VSA's existing work with provincial government which would benefit from stronger institutional linkages with RAMSI and UNDP. Vietnam would be another good choice because much groundwork has already been done on harmonisation and because the work is already sectorally clustered.

One of the problems for NZAID, in managing the relationship with VSA has been that the post of Civil Society Manager (along with others) has been overloaded and the result has been that for some years, the annual budget has been disbursed to VSA with minimal understanding of what VSA is actually doing. One reason why the FA specified that there would be an NZAID and VSA staff member on this Review team, in addition to the aim of improving organisational learning in both NZAID and VSA, appears to have been to expose the DPM to the work of VSA which had otherwise proved impossible because of heavy workload and limited travel budgets. Whilst this has been beneficial it cannot substitute for ongoing partnership development based on information sharing. But it also

begs the question about where the relationship needs to be strongest. At present the focus of the relationship is Wellington but, if VSA and NZAID aim to improve development effectiveness, the focus of the relationship actually needs to be in-country. It is not possible for the DPM to understand VSA across 12 countries and it is not necessarily desirable if it serves to centralise relationships at a time when decentralisation is more appropriate.

These are major implications for policy and practice and can only be surfaced as issues by this Review. Discussions about how to move forward will result and be ongoing.

4.3 Learning

'VSA will...continue to share high-quality information and advice among Council, branches, members, volunteers and staff.' (VSA Strategic Plan 2003-2006)

'We will...share the achievements and learning from our work within VSA and with others working in development.' (VSA Strategic Intent 2007-2009)

The statements above provide a good indication of the progress over time that VSA has made towards prioritising learning within and beyond the organisation. This section looks at how learning has taken place within VSA with particular reference to the Monitoring and Learning Framework (MLF).

4.3.1 Learning at VSA in Wellington

The MLF is facilitating a learning culture within VSA. Its development was gradual, participatory, staff were informed of its progress and there has been significant buy-in to its implementation. The framework is just that - a framework - rather than a prescriptive schedule of activities. Operationalisation of the MLF is decided unit by unit during annual programme planning, according to relevance and interest to each. Examples of outputs achieved under the MLF during the 2003-2007 period of review include the case study 'Rebuilding Bougainville and the role of New Zealand VSA volunteers' (2005), 'Review of Health Assignments in Binh Dinh Province, Vietnam' (2006) and Africa partner conferences in Tanzania (2005) and South Africa (2006).

These and other outputs achieved under the MLF 2003-2007 are informing development practice to varying degrees. For example the Bougainville case study continues to provide useful background information and reflection for VSA's Bougainville field office and the Early Returns Review, underway in early 2007, is expected to inform practice in and between the Recruitment & Training and International Programmes units.

Approaches to learning are active and vary between units. Recruitment & Training has an institutional approach to learning; meetings are held, minutes taken, documents kept on file. Regional programmes in the International Programmes Unit (IPU) hold regular meetings to share information, and programme officers in the IPU have healthy working relationships and share information between their respective regions. These discussions are more likely to take place informally and are less likely to be recorded. The annual IPU planning week is a learning forum in which units meet to share experience, ideas and information, and plan for the year ahead, and provides an opportunity for locally recruited overseas staff to bring their perspectives to inform VSA in Wellington. The planning week is clearly valued by all staff. These different approaches may reflect the different nature of the units' work, related to the more tangible nature of volunteer sending and the less tangible area of development effectiveness.

4.3.2 Learning between and among VSA, Volunteers and Partners

The strong relationship between partners and volunteers is the place where VSA has the best opportunity to capture, analyse and share learning. It locates partners (as the agents of community development) and volunteers (as the agents of change) at the centre of the development process. Learning captured and shared here could provide impetus to strengthen and harmonise other relationships and, by doing so, feed into better development effectiveness. For example a vibrant learning environment between VSA, volunteers and partners would support VSA's engagement and lobbying efforts with host governments, NZAID and other agencies, recognised by VSA which has made harmonisation one of the development focus areas of the current Strategic Intent.

VSA's *Assignment Management Handbook* sets out the process for tracking each assignment and details the reporting procedures required by VSA Programme staff, volunteers and partners. This record informs future placements and programme reviews/evaluations; for example the process of the Vietnam Health Review included a period of reading and analysing all reports from volunteers since the start of the programme.

The current and returned volunteers interviewed for the review, however, seem to have little sense of how their experience feeds back and informs VSA. Some volunteers describe their reporting as cursory at best, and a few have not and do not intend to report. Their perception of a 'black hole' of reporting correlates with this lack of enthusiasm for and interest in reporting. The requirement for partners to sign off on reports, whilst important in principle, can discourage full honesty from volunteers when difficult issues are being addressed.

This question of the volunteers' *perception* of reporting is important. Reporting procedures are in place at VSA to ensure that learning is shared, but at the moment there is both a qualitative and quantitative gap between what is required and what is received. If volunteers better understand the long-term importance to VSA of their experience in-country, and if they and the partners they work for are encouraged to report in a way that

they both *perceive* as mutually relevant and useful, this will strengthen partnerships, ensure lessons learned are shared across the board, and possibly increase development effectiveness. To this end VSA might consider reviewing the content of its reporting session at pre-departure briefings and use, for example, a short participatory activity around 'good' and 'bad' reporting and the importance of the respective knock-on effects for VSA.

More structured reporting from partners alone could be useful. This might take the form of a minuted 'conversation' around relevant questions during VSA staff in-country visits; a structured conversation might be more effective rather than an obviously defined questionnaire-cum-monitoring activity. Generic questions could be asked to all partners in all countries of work to better capture general understanding about VSA approaches and volunteers, as well as country-, partner- and assignment-specific questions.

The history of VSA's relationships with partner organisations is not generally understood by volunteers. Volunteers in some partner organisations with longer-term VSA involvement expressed a feeling of starting from scratch, of lacking understanding of how and why their position developed, and of how it was related to what earlier volunteers had done. VSA's tracking system has this information on file, but it is not necessarily shared. There may be good reasons for this, for example issues of confidentiality, but volunteers do not understand these and perceive it to a missing element in pre-departure briefing.

Field visits by VSA in-country, and post-assignment debriefs at VSA in Wellington, are where most learning is shared. 'Face-to-face' was described as the most effective way for VSA and volunteers to learn from each other, though much of this learning is to do with pastoral care and logistics rather than development effectiveness. Debriefs are seen by volunteers as real and useful, especially where they are informing planning for future volunteer assignment descriptions.

Some volunteers note a need for development resources (for example around participatory planning techniques) and that they do not at the moment see VSA as a possible source of development information. Through the External Relations Unit (and beyond the detailed scope of this review), VSA is moving to facilitate a 'can-do' network of New Zealand-based peers who could provide voluntary distance-support for volunteers in-country. This is a positive move towards VSA being seen as a potential professional resource for volunteers, but may be geared towards a New Zealand rather than local perspective (see also 4.1.3). Ideally this would complement in-country support networks; volunteers are aware that that they could better support each other professionally, but are unable or unwilling to do this without facilitation (for example monthly volunteer meetings were trialled in Phnom Penh by VSA field officers, but fell apart when left unstructured).

A model example of learning between VSA, volunteers and partners has been undertaken by the Africa programme, which brought local partners, Africa field staff and volunteers together to workshop M&E in a Tanzania Partner Conference in 2005. This was

considered valuable by partners as it both overcame their initial reservations about the relevance of M&E for their work, and allowed them to meet and network together for the first time.

VSA is also supporting the work of NZ-based academic John Schischka in Vanuatu. This is attempting to measure impact over time using relatively new qualitative methodology to capture information on the ground; in this case that of parents whose children attend pre-schools run by Pri-Skul Asosiesen Blong Vanuatu (PSABV), a local organisation which has had input from VSA (and other) volunteers over many years. PSABV describe this as useful lobbying information for them as they move to closer ties with the Ministry of Education. Over time, and given good analysis, long-term studies of this sort may give VSA and partners a clearer measure of volunteer contribution to development effectiveness.

Some substantive learning takes place between volunteers and partners. VSA volunteers provide generally good and effective one-to-one (and, sometimes, volunteer-to-partner organisation) technical assistance, in the form of mentoring/coaching and vocational training. Where there are individual counterparts, these uniformly describe volunteers as 'being encouraging' (for example supporting rather than doing the work; being patient); 'making me brave' (for example to try new work practices; to express an opinion in staff meetings; to speak in public at workshops). Volunteers also spoke about learning to do things differently themselves and about seeing New Zealand in a different way. The monitoring of such individual learning and its impact - by partners, VSA and volunteers - is generally weak and is difficult to measure in terms of quantifiable development effectiveness. This is a common difficulty across development organizations and especially difficult when trying to measure the impact of TA or of social capital (see Annex III). It is likely that there is an impact on individuals and some communities but this would be extremely difficult to quantify.

Processing Lessons Learned: VSA and the UniVol experience

This pilot youth volunteer programme, in collaboration with the University of Otago, targets students with some development studies experience and looks to a nine-month volunteer placement for them. The first intake of UniVols had recently arrived in-country during the review period and provides an example of VSA's willingness to learn and adapt. UniVols who are placed alongside older and more experienced volunteers find themselves in a similar coaching/mentoring relationship as that between volunteers and local counterparts. This was seen as positive by both UniVols and core volunteers, and perceived to have personal and professional benefits in both directions, and to have knock-on benefits to the partner organisations.

This review considered the UniVols programme in the context of development effectiveness, partnership and learning which only reflects half the programme's purpose. Within VSA it is strategically targeted towards development education within NZ - which is outside the ToR - as well as towards development in-country.

The first group of UniVols left for their assignments in the first quarter of 2007.

What was planned

A VSA working group spent more than a year designing a proposed youth programme, incorporating lessons learned from an earlier, unsuccessful school leaver programme.

The final concept was that a pilot group of three student volunteers from Otago University would be selected and sent into the field in February 2007.

What happened during recruitment

The unexpectedly high calibre of applicants gave VSA the opportunity to select eight applicants. Specific assignment descriptions were not available for several UniVols until after their briefing, during which some UniVols had not yet been placed. VSA was confident that current partner organisations could be approached that would welcome additional volunteer input.

What this meant in-country

Less time was available than anticipated to liaise with partner organisations. 'Selling' the UniVol concept to partners - apart from those with a youth focus - proved harder than expected; partners generally wanted experience rather than youth. There was a rush to make deadlines based around the university year. This meant the UniVols pilot was more supply-driven than VSA would have wished, and included the placement of UniVols with new and untried partner organizations.

What was learned

Potential partners, preferably existing ones, need to be identified earlier. NGOs have more flexibility than governments in the context of responding opportunistically. Partners respond more to the skills-set of the UniVol, and to the reputation of VSA, rather than to the idea of youth volunteers.

How the lessons will be applied

Recruitment procedures will be time lined differently. Briefings - which took place with core volunteers - need a UniVol specific component and will take place after assignments have been identified. Assignments will be scoped earlier and mentoring for UniVols will be arranged, ideally with a current volunteer.

How the process was documented

VSA have tracked the progress of the UniVols programme from design to implementation. Particularly noteworthy is the transparent way in which the teething troubles of the pilot group have been documented early on in the form of minutes of meetings, along with specific recommendations for changes.

How it looked in the field

UniVols had recently gone into post in Cambodia and Vanuatu, where this review made field visits. The reviewers' observations and conversations with UniVols in Cambodia raised several areas of concern and it was encouraging to note that, on return to Wellington, these had already been recognised and addressed by VSA. It was also encouraging to note that VSA wanted the reviewers to see the UniVols in-country first before contextualising the issues around their placements on their return. As a result the UniVol placements in Vanuatu, visited subsequently, were seen in a different context. This provided useful insights into the recommendations and changes VSA is undertaking, particularly in regard to learning between UniVols and core volunteers.

4.3.3 Learning between VSA and NZAID

The six-monthly scheduled meetings prescribed by the Funding Agreement provide an opportunity for learning between the organisations but these tend to focus on funding administration issues. VSA has provided input at the planning stage in to various NZAID country strategies (Africa; some Pacific countries). Joint attendance at, and contribution

to, VSA's 2006 South Africa partner conference by VSA, NZAID, the High Commission, partner organisations and volunteers resulted in mutual learning and a strengthened sense of partnership. VSA and NZAID are also engaged in a progressively substantial and positive dialogue in Vietnam, which is building on their respective lessons learned over time and is moving towards harmonisation of in-country efforts. However there is no structure - beyond that of the Funding Arrangement - for engagement. Engagement varies region by region and is dependent on individual efforts to make it happen.

VSA and NZAID might therefore consider ways to buy-in to, and to structure, mutual learning opportunities. In Wellington, for example, these might take the form of biannual scheduled meetings between regional units, and might be themed around sectors in which VSA and NZAID are working (for example early childhood education) or issues of common interest (for example alignment and harmonisation). Nominated staff in both organisations would be the liaison people to take the process forward. For learning purposes it would be important that meetings are themed in advance, form part of both organisations work plan, and that both organisations present and discuss information.

Other opportunities for learning might include structured one-to-one in-country briefings or debriefs after field visits with the relevant staff member. If travel logistics preclude face to face meetings in-country, phone briefings could be scheduled. Such briefings could form part of the structure of field trips and be integrated with, and add value to, the field report. However, scheduling meetings for meetings' sake would not be useful.

It is also clear that one size doesn't fit all, and that any formal structure for mutual learning that was time- or activity-bound would have to allow for different cultural and work practices in the countries across which VSA works. For example the inclusive nature of the South Africa Partner Conference, where the High Commissioner joined in group activities, would need to be radically adapted for, say, SE Asia although the principles of learning and partnership would remain the same.

4.3.4 Learning between VSA and the wider world

Development education, where VSA's learning enters the public domain, is undertaken by the External Relations Unit which includes in its work publication of the widely-disseminated VISTA magazine, school awareness and fund-raising activities, and the participation of VSA in DevNet conferences. Again, the work of the ERU is excluded from the TOR and is an acknowledged limitation of the review.

4.3.5 Monitoring and Learning Framework (MLF)

The focus area for this section is about the design and early implementation of the MLF, and how it is influencing VSA's planning processes and development practice. Specifically the TOR asked:

- What are the strengths and weaknesses of the MLF? Can it be improved and if so, how?
 - How is the MLF contributing to VSA's goal of being a learning NGO?
- Direct comments from interviewees are given in quotation marks.

It is intended that the MLF be used both as a learning tool as well as creating exciting professional development opportunities for staff to think about how their work is contributing to VSA's overall achievement

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The MLF is the umbrella under which VSA's monitoring and evaluation activities take place. It is outcomes-based and is seen as 'learning made real'. It is not prescriptive. The intention is that each unit will, during its annual planning, determine what monitoring activity is most useful, relevant and interesting for the year ahead, will undertake it accordingly and feed back to the rest of the organisation. 'Monitoring the monitoring' is the overall responsibility of the Planning & IT Manager.

As an exercise in organisational development, the inclusive design and implementation process of the MLF has contributed to a sense of staff ownership of the framework. Work is well underway to develop and embed the framework into VSA's work.

The MLF encourages an institutional approach to learning in which 'less gets lost' and allows units to report in different and programme-specific or individually relevant ways. It is a 'fluid' document, though while this flexibility is seen as a strength by some staff it's perceived as a weakness by others. Staff noted that 'one consequence of good M&E is our own professional development' and it is clear that the processes as well as the output described by the MLF facilitate learning, as intended. The MLF has also moved VSA on from monitoring and evaluation, seen as separate from learning, to a broader notion of monitoring as learning. The Africa programme used a SWOT analysis of both M&E and the MLF with partners who also saw the latter as a positive movement towards learning.

One of the challenges of the MLF is that it is difficult to quantify how much learning feeds back into VSA; how much are outputs used by others in the organisation in general? This is a common challenge for development organisations. Another is that assumptions about how the field experience of VSA staff and volunteers is processed and used by VSA are variable; the MLF is designed primarily for use internally in Wellington, so it is not surprising that it is not well understood in-country. There is also a disjuncture between staff who see the MLF as a useful, dynamic document and those who do not see a relevance to them. It was described as 'Pollyanna-ish' in setting the bar too high, and – during the 2003-2007 period of review – as not being SMART enough and being too fluid; the new MLF is more focused.

The review period covers the implementation of the first MLF. It should be noted that the MLF is a work in progress, that it has been revised for the period for 2007-2011, and that

the revised version is already operational. This, in itself, is a good example of learning and changing accordingly. The first MLF was clearly aligned with the Strategic Plan 2003-07 although that plan's acknowledged lack of focus and staff ownership is reflected in the MLF's less than specific outcomes.

The MLF has been revised to align with the current Strategic Intent 2007-2011. The clearer focus of the Intent has allowed the MLF to articulate more precise outcomes, and more specific and useful indicators (signs of achievement) and sources of information (measures). The MLF's 'development' section has been the area of focus given the ToR for this review and it is certainly moving in the right direction.

So the MLF allows staff to see what the outcomes of their work should be, what signs of achievement there are, and what supporting sources of information need to be. This allows for the provision of concrete cross-sectoral learning across the organisation. So, for example, issues addressed in the Vietnam Health Review are of wider relevance than to the Asia Programme unit under whose umbrella Vietnam sits. It provides concrete learning for VSA about the challenges and benefits of working with governments rather than NGOs; about balancing partner needs in-country and 'recruitability' of some assignments in NZ; it documents a long-term (and sometimes stormy) relationship between VSA and several agencies, and lessons learned from that.

It may be useful for VSA to document the narrative discussion around the process of implementation of the MLF. For example, if it is hard or slow going to get some activities underway, why is that the case? Is this a structural feature of the MLF, or is it to do with staff responses to it? Some staff need greater guidance than others to see the relevance of the MLF. Those who have individually undertaken or been mentored through a monitoring activity that both feeds back into the organisation and provides personal/professional development see its value more clearly.

In terms of how the design and early implementation of the MLF is influencing VSA's planning processes and development approach it is clear that there are good results to date with some outputs, such as the case studies, informing VSA practice. The MLF is the tool used by all units to articulate, plan and operationalise their annual monitoring activities. However, the first MLF during the 2003-07 review period was considered by some staff to be too fluid and unspecific. The current MLF 2007-2011 is SMART-er and concentrates development M&E efforts where they matter most – at partner/volunteer level – for greater learning. Evidence for its ongoing influence is not yet there and it is probably too early to expect it. Implementation of the MLF is being monitored so this should become apparent over time

4.4 Accountability

4.4.1 Implementation of the recommendations of the 1998 MFAT review

The recommendations of the 1998 review have been implemented with the exception of #21 which related to a management audit of VSA that was not taken forward by MFAT. Recommendation #19, regarding a programme of joint field reviews starting in Asia, has been actioned but only by one joint field trip to Africa in 2001.

Almost ten years have passed since the recommendations were made, and both their language and quantitative focus reflect a different approach from the current review. For example the 'business plans' referred to are what are now regarded as VSA's annual 'operational plans'; 'Field Representative' - with the exception of one long-standing staff member - is no longer a current position. The 1998 review was heavily weighted towards figures and financial matters and all of these have been addressed by VSA.

Since 1998 VSA and its Council have moved progressively towards 'volunteering for international development', a direction that has been guided in the interim by two CEOs and several consecutive strategic plans. These plans show a significant progression in clarity of purpose, intended outcomes, and ways to monitor and learn from them. During this period VSA has professionalized across all units and continues to do so.

4.4.2 Response to the results of the 2002/2003 Social Accounts

NZAID suggested and funded the Social Accounts process as a means of promoting and supporting ongoing learning and accountability. VSA approached the process with equal parts enthusiasm and trepidation as a new, and unknown, way in which it could engage with its stakeholders. Social audit follow-up has been undertaken and is seen as ongoing with the Planning & IT Manager actively driving the process forward. VSA is working on five key areas highlighted in the audit: Council; Staff; Volunteers; Profile-raising/Development Education/Fundraising; and Branches. It has achieved tangible outputs in the form of workshops and handbooks, creative staff meetings, and better support systems across the key areas. The Monitoring and Learning Framework (MLF) is a key output of the social accounts process. Activities undertaken and outputs are detailed in annex 'Social Audit Follow-up'.

5 Conclusions

5.1 Development Effectiveness: responding to partner needs, increasing capacity and impact

VSA's processes for recruiting, sending and supporting volunteers have continually improved and are highly effective. General organisational planning and reporting processes are sound.

At country programme level there is some excellent work being done by volunteers, in particular in their capacity building role as coaches and mentors. Partners and other stakeholders are generally impressed with the quality of the volunteers especially the older volunteers who bring years of experience and maturity.

VSA has a long history as a volunteer sending organisation in which volunteers and their needs have been of primary importance. Whilst VSA has made sincere efforts to respond to the needs and priorities of partners, the processes for doing so are less well developed and therefore less effective. There is evidence of improvement and there are now more staff with development experience to guide the process. However, VSA staff are concentrated in Wellington and this is a barrier to developing full, equal and developmental relationships with partners in country.

Although VSA has long stated its intention to make the transition from being a volunteer sending to a development organisation the implications of this have never been spelled out. Definitions of development are very broad and beyond the capability of a small NGO to impact upon. Although VSA is making some solid progress in the transition, there is a tendency to be opportunistic rather than strategic in choices about partners and assignments. This can result in a collection of disparate assignments at country level rather than a focused and coherent programme which adds value to a larger collective effort. Scoping of assignments is perhaps the area of VSA's practice which requires most work and this may well be a function of operating in the two modes with the resulting confusion about whose needs are prioritised.

VSA's real value is as a provider of technical assistance whose primary role is to develop capacity and VSA faces the same challenges, in terms of selecting personnel and supporting them to have impact, as other larger and better resourced agencies. Global lessons from experience show that local ownership and strategic management are critical in order to prevent inputs being fragmented and unsustainable. This is particularly important where volunteers are working in an environment where there is a concentration of TA such as Solomon Islands or Cambodia. VSA has the potential to increase effectiveness through greater engagement in the alignment and harmonisation agendas.

VSA holds little evidence of impact. In part this is because measuring the impact of technical assistance is difficult for any agency and it is almost impossible to attribute

change to individual inputs. It is highly likely that VSA volunteers contribute to changes in individual performance and attitudes by providing good role models and being a continuing source of motivation and support. In some cases it is also possible that there is negative impact if the presence of a volunteer replaces a local staff member or if the relationship continues beyond the point that it is useful. It is also certainly the case that some volunteers have an impact in the community which is outside their assigned role and which is responsive to opportunity. However, overall, none of these impacts have been, or necessarily could be, measured and so remain at the level of the anecdotal.

If compared with the kind of TA generally provided by donors through highly paid consultants VSA is highly cost effective. It provides high quality volunteers with considerable experience and life skills, many of whom would be equal in calibre to their more highly paid colleagues. To that extent VSA provides excellent value for money. Whether VSA could provide the same volunteers at less cost without reducing the quality and quantity is beyond the scope of this review to assess.

5.2 Partnership with NZAID: communication and coordination, Funding Arrangement

The relationship between NZAID and VSA is good in terms of meeting contractual obligations. However, there is confusion and some disagreement among NZAID staff about the extent to which VSA should be independent of or aligned with NZAID. At country level the issue of in-country costs has been contentious but has been under continual review and changes have recently been made which will overcome some of the problems. Many NZAID staff, especially in Wellington, feel constrained in developing closer relationships with VSA by more urgent demands on their time and by the new policy level engagement especially in the Pacific.

Although NZAID and VSA have a relationship of very long standing they do not have a partnership. The desire to strengthen the relationship into a partnership appears to be stronger on the side of VSA although the reason for this is not well articulated. In the current structure, and with current relationships, it is difficult to identify real incentives for VSA to align with NZAID. However, if VSA wishes to be more effective in development it has much to gain from a deeper partnership with NZAID in which it can benefit from NZAID's greater resources to analyse and develop strategies and its proximity to the anti-poverty agenda of the partner government. To that end the effort in building partnerships needs to recognise the web of relationships and take place at country rather than Wellington level. Where VSA and NZAID both have in-country representatives there is likely to be greater success and potential to increase effectiveness.

The current Funding Arrangement is an improvement on the previous version and has met the needs of both NZAID and VSA because it is permissive rather than restrictive. Recognising that, in line with the Strategic Framework, VSA is an independent NGO and noting that there are few incentives at present for greater alignment with NZAID, the key

issue which faces NZAID and VSA is defining the purpose and nature of the relationship. In the 2007-2011 Strategic Intent, VSA has committed to harmonising activities alongside national government strategies. It may also be useful to consider a degree of commitment to harmonisation with NZAID.

For some years the annual budget has been disbursed to VSA with minimal understanding of what VSA is actually doing owing to overload in the responsible NZAID position. The purpose of NZAID participating in the Review was primarily to expose the DPM to the work of VSA. Whilst this has been beneficial it cannot substitute for ongoing partnership development based on information sharing. At present the focus of the relationship is Wellington but, if VSA and NZAID aim to improve development effectiveness, the focus of the relationship actually needs to be in-country.

5.3 Learning: the MLF, planning processes and development practice

The MLF is facilitating a learning culture in VSA and there are examples of positive outcomes that impact on processes. However, the MLF is essentially a tool for use in Wellington and amongst staff whereas the strong relationship between partners and volunteers is the place where VSA has the best opportunity to capture, analyse and share learning. The MLF has become increasingly SMART but it is too early to have evidence of ongoing influence.

At present volunteers have little sense of how their experience feeds back and informs VSA. Their perceptions are important because they are indicative of a qualitative and quantitative gap between what is required and what is received. Strengthening reporting so that it is equally important to volunteers and their work with partners will strengthen partnerships. More structured reporting from partners is also potentially important and useful.

Volunteers do not generally see VSA as an organisation from which they can learn in terms of improving the effectiveness of their assignment. VSA is finding means to address this but a presence in country, in which face to face learning can take place, is likely to be more effective than improving processes from Wellington. The Africa Partner Conferences are a model example of learning which is partner-focused.

Monitoring and evaluation are key challenges to all organisations and VSA has in place a framework for monitoring and learning which is producing interesting and useful reflections on practice. Substantive learning takes place at individual level between volunteers and partners but the monitoring of this over time is currently weak. Improvements on measuring impact would be valuable.

Learning between VSA and NZAID takes place in specific cases, such as the Africa partner conferences, but in general it is under-developed. There is much to gain from a

more structured approach to learning at country level as each organisation has unique relationships, experiences and perspectives which can inform the practice of the other.

5.4 Accountability: the 1998 Review and 2002/03 Social Accounts

The majority of the recommendations of the 1998 Review have been implemented and, where not, the reasons recorded. In the 10 years since that review both the language and quantitative focus reflect a different approach from the current Review so it is not helpful to dwell on the issues at this stage.

The Social Audit was a valuable process for VSA and the five key areas highlighted are being taken forward in a structured and process oriented way. The MLF is a key output from the Social Audit and there are other tangible outputs in terms of workshops and handbooks, creative staff meetings, and better support systems.

6 Recommendations and Issues for Follow Up

6.1 Recommendations

1. *Define Emphasis*

That VSA more clearly define the parameters to which it wants to go in its move towards 'international volunteering for development', in order to clarify whether the emphasis is on the volunteering or on the development.

2. *Shift focus in-country*

That, if VSA's emphasis is towards development, it considers devolving responsibility to staff strategically located in-country, in order to become more developmentally effective.

3. *Revisit relationship with NZAID*

That VSA and NZAID individually and jointly revisit the purpose of their relationship and decide on what basis to take it forward – relationship (characterised by convenience or necessity) or partnership (characterised by close cooperation with clearly defined joint rights and responsibilities).

4. *Experiment in Alignment*

That if VSA and NZAID decide to move forward as partners, an 'alignment experiment' during the term of the next funding agreement is considered. This would see a cluster of volunteer placements in one country that would be both fully aligned with NZAID, and entered into with partners who subscribe to host government development agendas.

Issues for Follow Up

Issues that VSA will need to consider if it continues to move towards a development approach include:

- revisiting the placement of staff in-country, and weighing issues of cost effectiveness against development effectiveness;
- addressing issues around volunteer expectations of pastoral care - rather than development resource support - by staff in-country;
- reviewing its control mechanisms for a targeted and strategic scoping of assignments, particularly in the context of 'fewer, longer, deeper'.

Issues that VSA and NZAID will need to consider in a move towards greater partnership for development effectiveness include:

- implications arising from the notion of independent action as enshrined in the NGOs Strategic Framework, and alignment (together and with other actors) as both a necessary and desirable part of development effectiveness;
- ways in which the high level Paris Declaration partnership commitments of ownership, alignment, harmonisation, managing for results and mutual accountability can be best realised, applied and measured by agencies working on the ground; that is, bridging the gap between policy and practice;
- the integrated nature of development effectiveness, partnership and learning.

VOLUNTEER SERVICE ABROAD
(VSA)

REVIEW

2003-2007

Volume II

Annexes

Sue Emmott
Virginia Jealous

April-May 2007

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Annex I: Terms of Reference

BACKGROUND

Since VSA commenced operation in 1962 the New Zealand Government has provided a significant proportion of VSA's budget, through the Official Development Assistance (ODA) Programme. NZAID currently provides support to VSA in accordance with a four-year comprehensive funding arrangement (2003-2007) agreed on an annual basis.

A core grant supports VSA's work in developing partnerships, identifying and scoping assignments and the recruitment, placement and management of volunteers in the field. It also supports VSA's development education, public awareness and fundraising programmes. In addition, NZAID provides non-core grants to contribute to the in-country costs of volunteers in specified countries where partner organisations do not have adequate resources to meet these costs.

Volunteer Service Abroad (VSA) promotes international volunteering for development, linking New Zealanders with people working to create positive change in their communities and countries. Working in partnerships with government, NGOs and community-based organisations key development needs are identified. VSA then responds to requests for skilled volunteers to support its partners improve their development outcomes.

A core tenet of VSA's approach is about working and learning together with partner organisations to create pathways for change. VSA is currently working in 15 countries across Africa, South-east Asia and the Pacific and has approximately 100 volunteers on assignment at any time.

In 2004/2005 VSA developed a Monitoring and Learning Framework (MLF). The MLF was designed to provide a structure and mechanism for documenting the progress towards implementing VSA's strategic plan. Whilst primarily a learning tool for VSA, the MLF also provides additional key performance indicators for reporting to NZAID. The indicators developed are based on "signs of achievement". They describe what VSA would like to be able to demonstrate about its work as an organisation. Each year a monitoring plan with the key analysis to be undertaken is developed and the results reported on.

The Ministry of Foreign Affairs undertook a review of its support to VSA in 1998. In 2002/2003 NZAID funded VSA to undertake a Social Audit and the result were presented as a set of Social Accounts. The review provided specific recommendations for implementation, and the Social Audit highlighted areas for VSA to focus on.

This review is intended to provide recommendations that will inform the development of a new four-year funding arrangement between NZAID and VSA. This new agreement will be finalised by 30 June 2007.

PURPOSE

This review is being carried out to assess the extent to which the programme managed by VSA is fulfilling the purposes outlined in the agreement between VSA and NZAID, and to consider if a new funding arrangement should incorporate different purposes and objectives.

The review provides an opportunity to learn from an examination of current practice so as to improve development outcomes. It is acknowledged that learning and improvement is an ongoing activity for both VSA and NZAID. The review is intended to be useful for both parties.

SCOPE

It will consider all VSA's work excluding that of the External Relations Unit (public awareness, development education and fundraising). It will not involve undertaking a field visit to Africa, but will be able to draw on the feedback provided by VSA's partners to NZAID as part of the ongoing Africa Strategy Review. The time period the review will cover is the duration of the current funding arrangement, that is, 1 July 2003 – 30 July 2007.

The main stakeholders involved in the review are staff of both NZAID and VSA, including New Zealand and in-country staff, and in-country partner organisations. The review will consider key questions in particular detail in two geographical localities.

OBJECTIVES

The review will focus on:

- How VSA's implementation of a developmental approach to volunteer placement contributes to community development and poverty alleviation
- How the design and early implementation of VSA's Monitoring and Learning Framework is influencing VSA's planning processes and development practice
- What changes, if any, should be made to the current comprehensive funding arrangement when drafting the arrangement for 2007 – 2011.
- What are VSA and NZAID's views on the effectiveness of current communication and coordination between the two organisations and what, if any, policy and practice implications arise from these perceptions?

- What actions VSA has taken to implement the recommendations of the 1998 Ministry of Foreign Affairs and Trade review and respond to the results of the 2002/03 Social Accounts.

The following key questions will guide the review:

1. How effective are the processes that VSA has in place to ensure a developmental approach to volunteer placement that contributes to community development and poverty alleviation?

- How effectively does VSA respond to and address partner needs and priorities?
- What does VSA do to increase partner capacity to alleviate poverty?
- What evidence does VSA hold regarding the impact of its capacity building work?
- What are VSA and NZAID's views on the effectiveness of current communication and coordination between the two organisations and what, if any, policy and practice implications arise from these perceptions?
- What is going well and why? What are the lessons, challenges and gaps and how can these processes be improved?

2. How is VSA's current Monitoring and Learning Framework contributing to VSA's development practice, including organisational development?

- What are the strengths and weaknesses of the design of the Monitoring and Learning Framework? Can it be improved and if so, how?

- Since introduction of the Monitoring and Learning Framework, how is the Framework contributing to VSA's achievement of its intention to be a "Learning NGO"?

- What is going well and why? What are the lessons, challenges and gaps?

3. To what extent has VSA implemented the recommendations of the 1998 Ministry of Foreign Affairs and Trade review and responded to the results of the 2002/03 Social Accounts?

4. To what extent does the VSA/NZAID comprehensive funding arrangement articulate the purposes, roles and mechanisms desired for the relationship?

- Are the purposes, roles and mechanisms outlined in the comprehensive funding arrangement still those desired by stakeholders?
- Are there gaps in current funding arrangements?
- What changes, if any, should be made when the new arrangement is drafted?

METHODOLOGY

A consultant or team of consultants will be employed and then asked to develop a design, plan and budget for the review, incorporating participatory approaches as feasible and appropriate, and gender analysis. NZAID will cover the cost of the review.

The component of the review that is New Zealand based will be undertaken at the offices of VSA, and NZAID. The reviewers may also meet with selected returned volunteers.

Case studies, including in-country visits will be undertaken in two developing countries. These will examine the contribution VSA has made to improvements in development outcomes achieved by partner organisations.

In Vanuatu the review will focus on how VSA's work is contributing to improved development outcomes in early childhood education and women's affairs.

In Cambodia it will focus on the impact of VSA's work with NGOs and how this is improving NGO capacity to serve the communities they work with.

The review will take place in the first half of calendar year 2000. It will be completed by the end of May.

MANAGEMENT OF THE REVIEW

NZAID is commissioning the review. NZAID will choose a consultant or team of consultants to undertake the review, in consultation with VSA.

A steering group will be established including a representative of SAEG, the Civil Society Programme Manager, the CEO of VSA and another person nominated by VSA. The steering group will

- Provide feedback to the consultant on the review plan and budget
- Provide practical support to the consultant(s)
- Provide comment on a draft report.

COMPOSITION OF THE REVIEW TEAM

The review team will consist of a consultant or consultants, and the NZAID Civil Society Programme Manager.

The review team will need the following skills, knowledge and experience:

- Experience as a reviewer/evaluator of community development programmes A good understanding of capacity building as a development intervention
- Experience with working with medium sized non-government organisations
- Experience of and skill in participatory approaches to review/evaluation and gender analysis

In-country partners will be asked to facilitate meetings between the reviewers and beneficiaries of volunteer placements.

A VSA Programme Officer will accompany the review team for the field visits. The VSA Programme Officer for each visit will not have been directly involved in the design and management of the VSA programme in the locality being visited.

REPORTING REQUIREMENTS

A half way report will be made to the steering committee. This report can be provided in brief note form and is not expected to resemble the final report. The steering committee will comment on any issues that have arisen at this stage and provide guidance on addressing these.

The review team will provide a final written report with recommendations aimed at improving the programme. The report should not exceed 50 pages in length, excluding appendices and conform to the NZAID guidelines on the structure of evaluation reports. It will be provided as both a hard copy and in electronic form.

REVIEW FOLLOW-UP

The review's recommendations will be considered in the drafting of the new comprehensive funding arrangement between VSA and NZAID. If recommendations seek changes to the way VSA or NZAID operates, these changes will be considered and may be incorporated in the new agreement. Implementation will be monitored through the VSA annual reporting process to NZAID, the six monthly relationship meetings and any other mechanism agreed between the parties.

Annex II: Review Methodology

Methodology and Workplan March to May 2007

1. Purpose of the Review

The review is being carried out to assess the extent to which the program managed by VSA is fulfilling the purposes outlined in the agreement between VSA and NZAID, and to consider if a new funding arrangement should incorporate different purposes and objectives.

The **focus** of the review is on examining current practice in order for both VSA and NZAID to learn and improve.

The review will focus on:

1. How VSA's implementation of a developmental approach to volunteer placement contributes to community development and poverty alleviation
2. How the design and early implementation of VSA's Monitoring and Learning Framework is influencing VSA's planning processes and development practice
3. What changes, if any, should be made to the current comprehensive funding arrangement when drafting the arrangement for 2007-2011?
4. What are VSA and NZAID's views on the effectiveness of current communication and coordination between the two organisations and what, if any policy and practice implications arise from these perceptions?
5. What actions has VSA taken to implement the recommendations of the 1998 MFAF review and respond to the results of the 2002/03 Social Accounts

The **scope** of the review is all VSA's work excluding that of the External Relations Unit (public awareness, development education and fundraising) between July 2003 and July 2007.

2. Review Principles

The review approach will be consistent with the principles specified by NZAID and will:

- involve stakeholders at all stages of the process
- build capacity as an integral part and intended outcome of stakeholder involvement in the process

The main stakeholders are in-country and NZ-based staff of both VSA and NZAID, and in-country partner organisations.

3. Limitations of the Review

There are two limitations to the review:

1. In accordance with the terms of the Funding Arrangement the 'evaluation' team includes staff of NZAID and VSA. During field visits this may limit the partner organisations and volunteers' willingness to speak freely.
2. The External Relations Unit was not included in the review TOR. This limits the opportunity to reflect the integrated nature of VSA's approach to development.

4. Program Logic

During the early period of review the development assumption of VSA was not clearly stated. The purpose statement read "VSA exists so that partner communities and volunteers achieve sustainable wellbeing and mutual understanding through effective development". The new Strategic Intent for the period 2007-2011 now clearly articulates the assumption that the sharing of skills and knowledge between New Zealand volunteers, partner organisations, and communities abroad will help improve quality of life and build self-determining communities and stable nations.

In engaging with VSA as a partner the assumption of NZAID is that VSA shares NZAID's strategic goals and objectives¹. Further, that harnessing the different approaches and methods of NGOs will result in a productive and mutually beneficial relationship².

5. Outline of Methodology

The Core Team leading the review are Sue Emmott and Virginia Jealous (Independent Consultants contracted by NZAID). The extended team for field work consists of Sally Jackman (NZAID Civil Society Manager) for both countries, and Mui Ngah Lee (VSA Program Officer for Laos and Timor Leste) and Karen Horton (VSA Program Officer for PNG).

The review is in three phases:

Phase 1: 2 weeks in Wellington undertaking documentary review and conducting interviews with staff of VSA and NZAID, returned volunteers and other key stakeholders

¹ Comprehensive Funding Arrangement between NZAID and VSA
² Strategic Policy Framework for relations between NZAID and NZ NGOs

Phase 2: Field visits to Cambodia and Vanuatu (1 week each)

Phase 3: Analysis and write-up

Although the review will undertake in-depth case studies of two countries (selected jointly by VSA and NZAID) it was not the intention to limit the investigation to Cambodia and Vanuatu only. With limited time and resources the review will aim to broaden the findings through:

- 'mini' case studies of Africa, Vietnam and Bougainville using documentary sources of learning initiated by VSA (partner consultations, health sector review, case study) and doing limited interviews with returned volunteers and relevant VSA and NZAID personnel
- 'mini' case study of Solomon Islands to highlight the issues unique to working in post conflict countries
- drawing on specific country experience of the VSA staff accompanying the team to the field (PNG, Timor Leste)

In these mini case studies the focus is predominantly on Learning (Focus 3), in particular whether learning is a continuing process. Whilst not the primary focus, for reasons of manageability, it is envisaged that these case studies will also elicit useful information on Development Effectiveness (Focus 1).

Methods will be predominantly qualitative and will include:

- semi-structured interviews in person, by telephone and email
- focus group with NZAID staff
- in depth discussion between team members and NZAID and VSA staff during field work of best practice in volunteering

Key documents to be analysed include:

- VSA Strategic Intent
- Annual Plans, Cascade Plans and Reports
- Monitoring and Learning Framework
- Social Accounts
- 1998 MFAT Review
- NZAID Strategic Policy Framework for NGOs and Funding Arrangement
- Bougainville Case Study
- Review of Vietnam Health Sector
- Africa Partner Consultations

Questions, Methods and Information Sources

Focus Area	Key Questions (from TOR)	Data collection methods and information sources
1. Development effectiveness	<ul style="list-style-type: none"> How effectively does VSA respond to and address <u>partner organisation needs</u> and priorities? What does VSA do to increase partner organisation capacity to do community development and alleviate poverty? What evidence does VSA hold regarding the <u>impact</u> of its capacity building work? 	Documentary evidence VSA CEO Regional PMs and POs Recruitment & Training section Volunteers Partners
2. Partnership with NZAID	<ul style="list-style-type: none"> How effective is coordination between VSA and NZAID? How effective is communication between VSA and NZAID? Are the purposes, roles and mechanisms of the funding arrangement appropriate? Are there gaps in the current funding arrangements? What are the implications for policy and practice? 	Documentary evidence VSA CEO Corporate Services Manager Program Staff NZAID Staff
3. Learning	<ul style="list-style-type: none"> What are the strengths and weaknesses of the MLF? Can it be improved and, if so, how? How is the MLF contributing to VSA's goal of being a learning NGO? How do volunteers contribute to learning? 	Documentary evidence VSA CEO All Managers All POs Volunteers
4. Accountability	<ul style="list-style-type: none"> Has VSA implemented the recommendations of the 1998 MFAT review and 2002/03 Social Accounts? If yes, have there been tangible results? If not, is there a substantive analysis of reasons? 	Documentary evidence VSA CEO Managers

Case Studies – methods, rationale, person sources

Full Case Studies	Method	Rationale	Supports Question	Interviews ³	country
Cambodia	Field Visit (choice of NZAID/VSA)	Selected case study of	1 2 3	Phone/Email/Person In 2 LT Partners – no current vol 2 LT Partners – current vol 1 new partner – new vol Former vols still in Phnom Penh	Former VSA CEO NZAID Manager - Bangkok
Vanuatu	Field Visit (choice of NZAID/VSA)	Selected case study of Research on Pre Schools	1 2 3	Partner Pre-School – current vol Partner NCW – current vol NZAID Manager	VSA PO Bougainville – former vol 3 former pre-school vols 2 former NCW vols 1 Small Bag Theatre vol Presbyterian Church vol EduTrain vol
Mini Case Studies with focus on learning					
Vietnam Health Sector	Follow up to Review (choice of consultants)	2000-05 Review of Health Sector	Primarily with reference to 1		5 returned vols 1 current vol NZAID
Bougainville	Follow up to Case Study (choice of consultants)	Case Study Series Peacebuilding MFAT request	"		PO Bougainville NZAID Terry Batts (former VSA CEO)
Africa	Follow up to Partner Conferences (suggestion VSA)		"		
Solomon Islands	Interviews (choice of consultants)	Specific issues post-conflict Links with Bougainville & Cambodia	"		2 current vols 8 returned vols MFAT Brian Sanderson

³ List does not include VSA staff who are interviewed across full range of questions

Outline of Review Preparation, Field work and Report Writing

Key Steps	Who	When	Where
Briefing & Data collection Preparation of methodology and workshop Interviews Preparation of interview schedules for field visits	VSA, NZAID and Steering Group	Weeks 1&2: Mar 12-23	Wellington
Fieldwork Cambodia	Consultants + VSA Program Officer + NZAID DPM	Week 3: 25 Mar - 1 Apr	Cambodia
Analysis and write up of Cambodia case study	Consultants	Week 4-5: 2-5 April (Easter 6-9 April)	Wellington
Preparation for Vanuatu field visit taking account of methodological issues arising from Cambodia visit	All staff interested in VSA Consultants, Ann	W/c 2 April 3 April 16 April	
Half way Presentation to VSA - elicit feedback NZAID open meeting Feedback to Evaluation Adviser (away previous week)	Consultants + VSA Program Officer + NZAID DPM	Week 5-6: 11-18 April	Vanuatu
Fieldwork Vanuatu			
Analysis & writing First Draft of Report Presentation/debrief to Steering Group + VSA staff Departure Virginia Completion & submission first draft of Report	Consultants SG + VSA staff Virginia Sue	Week 6: 7-18-20, 23-25 Apr 26 April 26-27, 30 Apr-4 May	Wellington Auckland
Circulation of report for comments Period for comments Comments to consultants Finalisation of report	Sally NZAID, VSA Sue & Virginia	4/7 May 7-18 May 21 May 25 May	

Questions for Fieldwork and NZAID Focus Group

	Focus 1: Development Effectiveness	Focus 2: Relationship with NZAID	Focus 3: Learning
Partner Orgs	<ol style="list-style-type: none"> How do VSA staff work with you on your needs and priorities? (assignment/specification, monitoring) What do volunteers do/have done in your organisation? (capacity building, impact) 		
Volunteers	<ol style="list-style-type: none"> How do you go about developing capacity and what are the issues? How do you know whether you are having any impact? What do you do outside work in the community 	<ol style="list-style-type: none"> Do you have any dealings with NZAID? 	<ol style="list-style-type: none"> How do you contribute to learning within VSA? What have you personally learned?
Returned Volunteers			<ol style="list-style-type: none"> Did you feel you contributed to learning in VSA? If yes, how? If no, why not? Did you feel VSA listened to you and learned from you? What are the things that promote learning in VSA or act as barriers to it?
Focus Group Volunteers Cambodia	<ol style="list-style-type: none"> In developing a long terms and sustainable partnership, what are the respective roles of VSA and the volunteers 	<ol style="list-style-type: none"> How do you feel about being part of NZ Inc - a greater NZ effort in the world? 	<ol style="list-style-type: none"> How would you like to debrief your learning on return to NZ

Focus Group Volunteers Vanuatu	1. What do think the relationship should be with NZAID in Vanuatu	1. How did you feel about having NZAID and VSA on the review team? 2. What does VSA need to learn about in Vanuatu? 3.
NZAID Focus Group	<p>The theory is that NZAID will seek alignment of policies and strategies whilst respecting VSA's independence.</p> <p>1. Is this theory achievable in practice?</p> <p>2. What are the barriers within NZAID to a more consistent and synergistic relationship?</p> <p>3. What does NZAID need to do to improve coordination?</p>	

Annex III: Notes on Social Capital

Contributed by Sally Jackman, NZAID DPM Civil Society

VSA has identified increased social capital as an outcome of VSA volunteer involvement in communities. For example, in the VSA report "Rebuilding Bougainville", VSA talks about a contribution to social capital resulting from the social contacts of volunteers that do not directly relate to formal objectives of assignments. VSA also claims that in the context of recovery from conflict it has assisted in rebuilding trust after division between individuals, families, communities and institutions in Bougainville.

Social capital is a difficult concept to tie down and certainly to observe in terms of intervention results. In "Rebuilding Bougainville", VSA quotes a World Bank definition as follows; "social capital refers to the institutions, relationships and norms that shape the quality and quantity of social interactions. social capital is not just the sum of the institutions which underpin a society – it is the glue that holds it together."

The New Zealand Department of Statistics has defined it as "relationships among actors (individuals, groups and or organisations) that create a capacity to act for mutual benefit or a common purpose." Both definitions are broad and therefore do not provide straightforward guidance in identifying social capital indicators.

The Department of Statistics published "A Framework for the Measurement of Social Capital in New Zealand" in 2001. This provided 124 suggested social capital indicators under 4 categories as follows:

- Behaviours that generate or dissolve social capital
- Attitudes and values that protect social exchanges associated with dense social capital
- Population groupings as social capital has to be understood within in a context specific understanding of the impacts of demographics, family associations, cultural experiences including religious activities, communication capacity and employment on the quality of networks and relationships
- Organisations as these bring together norms about acceptable actions, mandates for action, and social sanctions. The characteristics of interaction between organisations assists in a description of social capital in any society.

The detailed description of social relations these indicators provide could assist understanding of the social fabric that enables social cooperation, but implementation as a monitoring framework is beyond the capacity of most NGOs, and some governments. Other studies of social capital have substantially limited the number of indicators, which may reduce the explanatory power of the concept and limit the usefulness of the term.

The difficulty VSA faces is that it is extremely difficult to quantify the impact of volunteers on social relations in communities, however, this does not mean that influence is not occurring. For example, VSA volunteers in Cambodia are helping NGO staff understand how to teach illiterate people about farming techniques and legal rights.

Previously Cambodian staff have relied on the presentation of written information, which has limited the ability of the less literate people to learn new concepts and also the ability of teachers to learn about the reality of rural peoples. VSA has supported development of "bridging social capital" – that is, the capacity of different groups in society to create bridges of understanding that enable collaboration towards common goals.

In Vanuatu a VSA volunteer supported Ni-Van women to create a regular newspaper column on women's issue. This increased communication capacity may increase "bonding social capital", that is, a sense of solidarity that assists collaboration towards common goals.

These developments may not be easily counted but they should not be regarded as less valuable than more tangible outcomes.

VSA has worked on five key areas.

<p>1. Council</p> <ul style="list-style-type: none"> ▪ Role of Council 	<ul style="list-style-type: none"> ▪ Council strategic thinking workshop February 2005 ▪ Monitoring and Learning Framework in place ▪ CEO's report iterations ▪ Governance structure review (initiated February 2007) ▪ Council induction on 2006-07 work plan
<p>2. Staff</p> <ul style="list-style-type: none"> ▪ Communication ▪ Human resource systems 	<ul style="list-style-type: none"> ▪ Staff meetings – evolving format ▪ Buzz (weekly bulletin) ▪ IT Team ▪ Inter unit brainstorming teams ▪ Systems and processes in place ▪ Guidelines <ul style="list-style-type: none"> - clear - consultative approval process - accessible ▪ Performance review workshops May 2004, February 2005 ▪ Job sizing workshops 2005 ▪ Comprehensive orientation programme in place ▪ Ongoing tracking – Workplace survey
<p>3. Volunteers</p> <ul style="list-style-type: none"> ▪ Support by branches ▪ Support by VSA 	<ul style="list-style-type: none"> ▪ Systems in place to inform branches when volunteers depart and return ▪ Wellington branch meeting with volunteers at briefing ▪ Ongoing process – Debriefing ▪ Core business

Annex V: Persons Met and Documents Consulted

WELLINGTON

CEO VSA
Programme Manager Pacific, VSA
Field Representative, Solomon Islands, VSA
Manager Corporate Services, VSA
Manager Planning & IT, VSA
Programme Manager Asia, VSA
Programme Officer Vanuatu, VSA
Programme Officer PNG, VSA
Programme Officer Africa, VSA
Programme Officer Vietnam, VSA
Manager External Relations, VSA
Programme Manager Africa, VSA
Manager Recruitment & Training, VSA
Recruitment Coordinator, VSA
Recruitment Coordinator, VSA
Recruitment Coordinator, VSA
Training Coordinator, VSA
Returned Volunteer Vietnam
Returned Volunteer Vietnam
Returned Volunteer Vietnam (phone)
Returned Volunteer Solomon Islands
Returned Volunteer Solomon Islands (phone)
Returned Volunteer Vanuatu (phone)
Returned Volunteer Cambodia (phone)
Returned Volunteers Solomon Islands (email)
Returned Volunteer Timor Leste
Civil Society Manager, NZAID
Team Leader, Global, NZAID
Team Leader, Global, NZAID
Evaluation Adviser, NZAID
Development Program Manager PNG, NZAID
NZAID Manager Vietnam (email and phone)
NZAID Manager Bangkok (email and phone)
Development Program Manager Indonesia & Timor-Leste
Former DPM Civil Society
NZAID Manager Solomon Islands (email)
Director Pacific, NZAID
Director Global, NZAID
Institutional Strengthening Adviser, NZAID
DPM NZAID
DPM Pacific Governance, NZAID
Education Adviser, NZAID
Former High Commissioner Solomon Islands
Executive Director Council for International Development

s. 9(2)(a)

CAMBODIA

Volunteer Cambodian Disabled People's Organisation
Executive Director CDPO
Volunteer Farmers Livelihood Development
FLD Livelihoods staff
FLD Administrator

FLD Business Development
Executive Director FLD
Former Volunteer Cambodia Trust
Former Volunteer Cambodia Trust
Country Director Cambodia Trust
Accounts Cambodia Trust
Administration Manager Cambodia Trust
Rehabilitation Program Manager Cambodia Trust
VSA Program Officer (Cambodia & Bhutan)
Administrator, VSA Cambodia
UniVol, Rural Economic Development Association
UniVol, Community Legal Education Centre
Volunteer Community Legal Education Centre
Former Volunteer Cambodian Defenders Project
Acting Exec Director CDP
Lawyer, CDP
Program Officer (Lao & Timor-Leste), VSA
Former Volunteer Association of the Blind Cambodia
Volunteer Cyclo Centre
Volunteer Royal University of Phnom Penh, Cambodia
Volunteer Royal University of Phnom Penh, Cambodia
Volunteer Royal University of Phnom Penh, Cambodia
Volunteer Royal University of Phnom Penh, Cambodia

VANUATU

Director, Dept of Women's Affairs (DoWA)
Gender Planner, DoWA
DoWA
DoWA
Volunteer DoWA
Director, Wan Smol Bag
UniVol, WSB
Youth Centre Manager, WSB
Resources Distribution, WSB
Projects Manager, WSB
Director, WSB
Volunteer, WSB
Presbyterian Church of Vanuatu
Volunteer, PCV
UniVol, PCV
High Commissioner, Vanuatu
NZAID Manager, Vanuatu
Deputy High Commissioner, Vanuatu
Project Manager, EduTrain
Volunteer, EduTrain
National Coordinator, Pri Skul Asosiesen Blong Vanuatu
President, PSABV
Volunteer, PSABV
Former CEO VSA
Unassigned partner of volunteer
Unassigned partner of volunteer

SOLOMON ISLANDS (SE ONLY)

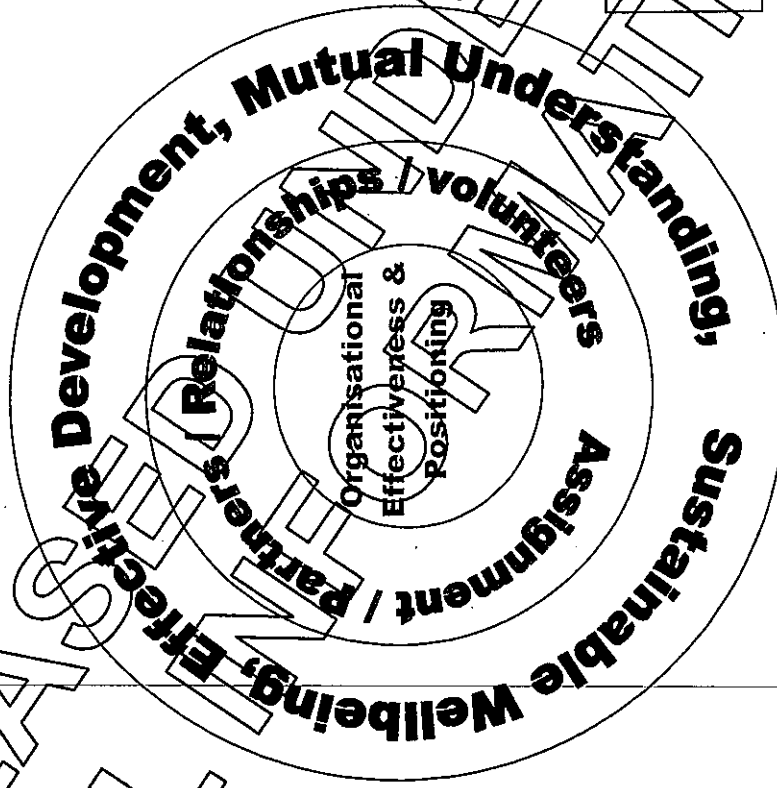
Volunteers, Malaita Provincial Government, Solomon Islands

Documents Consulted

AusAID Policy Statement 'Volunteers and Australian Development Cooperation' (2004)
Comprehensive Funding Arrangement between NZAID and VSA 2003-2007
DAC Evaluation Quality Standards – test phase application (2006)
NZAID Country Strategies for Cambodia & Vanuatu
NZAID Guideline on the Structure of Review and Evaluation Report (2006)
Review of VSA Core Contract with MFAT (1998)
Schischka, John Research on Participatory Appraisal Methodology for Pri-Skul
Asosiesen Blong Vanuatu (PSABV) Report on Focus Group Interviews (2006)
Strategic Policy Framework for relations between NZAID and New Zealand NGOs
(2003)
VSA Annual Plans, Annual Reports & Annual Reports to NZAID between 2002 and 2007
VSA Cascade of Plans 2007-2011
VSA Case Study 1 – Rebuilding Bougainville and the Role of New Zealand VSA
Volunteers (2005)
VSA Regional and Country Strategies for Asia & Pacific, and Cambodia & Vanuatu
VSA Monitoring and Evaluation Tanzania Workshop notes (2005)
VSA Monitoring and Learning Framework (MLF) 2003-2007 and 2007-2011
VSA Pacific Volunteer and EFTV graphs & charts 2000-2007
VSA Review of Health Assignments, Binh Dinh Province, Vietnam (2006)
VSA Social Accounts 2002/2003
VSA Social Audit Update (undated)
VSA Strategic Plan 2003-06
VSA Strategic Intent 2007-2011
VSA University Youth Programme Planning Proposal (2006)
VSA UniVol Meeting Minutes (2007)
VSA VISTA magazines
VSA Volunteer placement documentation (current assignment management handbooks
etc)
VSO Position Paper 'The Role of Volunteers in International Development'.



STRATEGIC PLAN 2003/2007
MONITORING & LEARNING FRAMEWORK



Section 1: Goals & Values
Section 2: Priority Outcomes 1 & 2
Section 3: Priority Outcomes 3, 4 & 5

**Monitoring and Learning Framework contributes to Millennium Development Goal 8:
Global Partnership – uniquely volunteer based**

SECTION 4

VSA Strategic Plan	Indicators – signs of achievement	Sources of information/measures/processes
<p>VSA Values</p> <p>VSA Goals:</p> <ol style="list-style-type: none"> 1. Sustainable well-being 2. Mutual understanding 3. Effective development 	<p>Impacts</p> <ul style="list-style-type: none"> • Council, staff, branches and volunteers espouse VSA's values¹ • Partner leadership/community ownership/power balance in hands of partners² • Shared planning and decision-making between VSA and partner, VSA and donor³ • Acknowledgement of complementary roles³ • Shared/agreed exit or continuation strategy between partner and VSA • Collaborative involvement between volunteer, partner and VSA³ • Social capital type indicator customised for programme around strengthening of communities/sector¹ • Direct pathways to donors/government, e.g. influencing policy or gaining access to resources, these will be specific to sector or theme. • Recognition of volunteer sending as a viable way to meet development needs⁴ • VSA programmes harmonised with other development agencies working in the country 	<ul style="list-style-type: none"> • Social audit • Sector, thematic and regional special research projects • Research of clusters • Case study • Key information from regular reports , built in organisational reporting • Results from social audit process Professional learning meetings • Baseline studies • Volunteer / Partner conference

VSA Strategic Plan	Indicators – signs of achievement	Sources of information/measures
<p>VSA Priority Outcomes:</p> <p>Relationships/Partners/Assignment results</p> <ol style="list-style-type: none"> VSA has high quality international programmes focused on achieving goals VSA functions through strong and positive relationships with overseas-based volunteers, partner communities and other development organisations 	<ul style="list-style-type: none"> • Volunteer recruitment meets best practice • Low numbers of early returns from placements by volunteers • Satisfied partners • New areas of development and useful skills identified by partners • New ways of volunteering explored with partners that are relevant to the situation and build capacity • Volunteer expectations of VSA are met • Effective strategic alliances established with development partners 	<ul style="list-style-type: none"> • Early return studies (R&T) • Results of social audit process (IT&P) • Key information from regular reports built in to organisational reporting (All Units) • Assignment specific information (IPU) • Strategic Alliance agreement established (R&T) • Partner organisation agreements & Partner reports (IPU) • Trends from debriefing and volunteer reports (IPU – all regions) • MOUs (IPU) • Research into youth volunteering (R&T)

SECTION 8

VSA Strategic Plan VSA Priority Outcomes:	Indicators – signs of achievement	Sources of information/measures
<p>Organisational effectiveness</p> <p>3. VSA is an integrated and well-functioning organisation in which all parts actively work together towards priority outcomes</p>	<ul style="list-style-type: none"> Information flows are appropriate and relevant Governance meets NGO best practice Strategic planning process involves key stakeholders Participatory policy making VSA demonstrates the characteristics of a learning organisation Supported volunteers VSA attracts and retains skilled and committed council, staff, branch members Organisational roles respected in implementation Returned volunteers wish to continue their involvement with VSA as members, donors and supporters 	<ul style="list-style-type: none"> Barriers to volunteering identified (CSU) Social Audit (IT&P) Governance indicators (Council) Council & subcommittee minutes (CEO, IT&P) Volunteer reports & debriefing reports (IPU) Partner & Assignment reports (IPU) Conference papers A comprehensive set of operational guidelines accessible to staff (CSU) An up to date staff handbook reflecting approved guidelines (CSU) All staff have performance plans, professional development plans and performance reviews. (CSU & CEO) Staff undertake regular training (CSU & R&T) Database analysis of membership and donors (ERU) & (IT&P) Contributions to Alumni section of the website. (ERU) Return volunteer motivation survey (ERU)
<p>5. VSA is an efficient and cost-effective organisation which acknowledges its support from NZAID and which also aims to gain a substantial proportion of its income from independent sources.</p>	<ul style="list-style-type: none"> Strategic agreement with NZAID in place Accurate predictive budgets NZAID and Council satisfied with budget, risk assessment and reports Satisfactory audit VSA Foundation investments meet or exceed target Funding base diversified Benchmarking studies demonstrate cost effectiveness 	<ul style="list-style-type: none"> Current NZAID framework agreement (CEO) Finance reports (CSU & CEO) Audit report (CSU) VSA Foundation reports Benchmarking studies with other volunteer organisations (CSU) EFTV, volunteer numbers (IT&P) Recruitment statistics (R&T) Funds raised (ERU)

<p>Organisational positioning</p> <p>6. There is an increased awareness within Aotearoa New Zealand of the work and values of VSA</p>	<ul style="list-style-type: none"> Predicted volunteer numbers met Percentage level of developed assignments filled Annual fundraising targets met or exceeded Relationship developed and strengthened with Tangata whenua Relationship developed and strengthened with host communities in New Zealand Suite of assignments that appeal to the NZ public Friendship campaign awareness High level of national and local media coverage VSA development education initiatives implemented in schools Implementing schools give positive feedback on VSA development education initiatives Distribution levels of VSA TA increase through demand Membership levels increase Branch activity 	<ul style="list-style-type: none"> Branch meeting minutes Funds & resources raised by branches Website hits (ERU) # of applications to assignments (R&T) Age groups applying (R&T) Ethnic breakdown of applicants (R&T) Friendship campaign uptake – retailers and schools (ERU) Quantity of bracelets sold (ERU) # schools participating in postcard project / journal project (ERU) Media uptake (ERU) Equivalent advertising costs (ERU) Audience numbers reached through media (ERU) # of unsolicited approaches by media (ERU) CID/KZAYD review Membership numbers & branch membership numbers
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VSA's weave to Te Tiriti O Waitangi

- The Principle of Good Faith and Integrity:** VSA is a highly respected organisation. This stems from its philosophy of giving support to those in need and the quality of its specialist volunteers in developing close and on-going relationships
- The Principle of Rangatiratanga (Self-determination):** The work of VSA aims at helping partner organisations retain, enhance, or regain self-sufficiency and independence
- The Principle of Partnership:** VSA works in close association, after due consultation, with its partner organisations
- The Principle of Manaakitanga (Support) and the Human Element:** VSA's contribution towards helping developing nations is to send volunteers, not financial aid. This has proved to be very successful over many years

Aorere (Awi) Riddell, VSA's Kaumatia 2003

Annex VII: VSA Staff Participants in Review

Contributed by Mui Ngah Lee (Cambodia) and Karen Horton (Vanuatu)

We were happy to be asked to participate in the NZAID review of VSA's programmes in Cambodia and Vanuatu. We see this review as an opportunity for learning by both VSA and NZAID in terms of how both organisations can work better together to achieve development effectiveness through international volunteering.

We also see it as an opportunity for VSA to use the lessons learned through the review to improve its practice, incorporate them into the Monitoring and Learning Framework and to achieve its desire to become an effective development organisation.

Throughout the review we have been challenged to reflect on our own work practices in the context of the way we manage our own programmes and we have started to consider how to improve on the following:

- The process of developing appropriate relationships with partner organisations
- How we engage with the partner organisations in assignment identification and development
- The ongoing strengthening of partner organisation relationships over time and distance
- The recruitment, selection and preparation of volunteers
- The in-country support of volunteers and partner organisations
- The strengthening of VSA relationships with relevant NZAID counterparts in-country
- Monitoring and Evaluation of volunteer assignments, through effective reporting mechanisms
- How to define development impact and collect evidence of VSA's effectiveness more clearly
- Awareness raising, branding and increasing VSA's profile in-country with other Development Organisations, NGO's, Government, and Funders
- How does VSA learn as an organisation and enable others to learn from its work

Our next steps after participating in this review is to find ways to share our learnings with our colleagues not only within the International Programmes Unit (IPU) but also with our other VSA colleagues.