



International FORUM on Development Service
FORUM International du Volontariat pour le Développement

IVCO Paper on Options

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Prepared for the
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FORUM Consultation Paper - Working on our Strategic Directions

This paper has been written by FORUM's Executive to inform discussion on Wednesday 26th November at IVCO 2008 in the session entitled "Moving Forward".

The paper reflects the range of issues and questions canvassed at recent IVCO meetings and ongoing discussion between members. The Executive is raising this series of issues as part of the preparatory work for the next iteration of our Strategic Plan, as we ask "Who are we as an organisation? What is our purpose? How do we best support each other and the work of international volunteer cooperation? What does our future work entail?"

Working on our Strategic Directions

FORUM's Strategic Plan 2006-2009, drawn up by FORUM's Executive after IVCO 2005 (Tokyo), is nearing the end of its 'shelf life'.

In 2005, the Executive acknowledged that FORUM at that time was:

- a "virtual" organisation as well as a global one
- resourced by the staff time and budgets of the organisations of the President and Executive members
- being requested to engage in areas of promotional work
- being asked by its growing global membership to do more, especially on research and conference/workshops
- needing to put in place the resources – staff and financial – that the new level and focus of its work required.

At IVCO 2008, it is timely for members to assess elements of our 2006–2009 Strategic Plan and, in particular, articulate FORUM's purpose, which is currently expressed as promoting:

- cooperation between members
- joint activities and/or collaboration amongst members
- the movement of development service towards increased exchange
- the interests, values and activities of members

while also:

- advocating and increasing public awareness of international volunteer cooperation
- providing a framework for exchange of information and experience on international development cooperation.

In living out FORUM's purpose, the Strategic Plan outlines objectives and activities in the three functional categories of:

- Membership
- Information and learning
- Research

In 2005, when the Strategic Plan was developed, implementation was seen as involving immediate work in the three areas of:

- Human resources
- Financial resources
- Constitution

It was acknowledged that if FORUM was to meet the external and internal expectations of its members, then FORUM needed to consider the volume of its work and put in place the required staff and financial resources.

Issues Arising

To assist with developing the next iteration of our ongoing Strategic Plan, FORUM members need to reconfirm or redetermine our major functional categories, which are currently membership; the sharing of information, experience and lessons learned; and research, and ask:

- Have all identified activities within each categories been completed and/or do they need updating?
- Are new categories needed?

Appendix 1 outlines the range of activities adopted by the FORUM Executive and the timeframes for completion. The Executive would like FORUM members to provide feedback on the value, timeliness and the level of member involvement in this work.

Discussions by the Executive in recent times have also canvassed issues relating to:

- The interaction of FORUM members as a network of support for and to each other, and how our collective body of work could be better supported within the life of FORUM. This is a dynamic which all 'peak' bodies need to regularly assess. What is FORUM's particular balance between the 'organisation' supporting its members and the members supporting the work of the 'organisation'? There is no doubt that FORUM today is a more active and collaborative network and can continue to open up and develop its body of knowledge.
- With a small Executive, a part time Executive Coordinator and a relatively stable but small membership, this will involve even higher levels of reciprocity between the Executive, the members and the Executive Coordinator. It is also timely to explore new models of working, including the nature of the Executive and the potential of establishing member working groups and/or portfolio responsibilities for Executive and/or other members. The range and nature of our membership, including the potential for opening it up to our partner organisations, is also relevant.
- FORUM needs to decide on the future role and place of IVCO (annual meeting of heads of agencies) and open up discussion on the nature and configuration of regional and other networking meetings. These events could also be linked within the framework of the Strategic Plan.
- As FORUM is increasingly requested to speak at events and contribute to policy debate and campaign activity, should a further category of activities supporting wider policy development and advocacy be included?
- The three current areas of focus could better express their links to the purpose of FORUM by articulating an outcome for each functional category, as follows:
 1. Growing and supporting membership
 2. Sharing and networking through information and learning, and
 3. Building a credible body of knowledge through research.

A major issue to be addressed and discussed is the relationship between FORUM and the southern partners of the member organisations.

The 2007 IVCO conference in Montreal provided a contrast to previous IVCO international events with its high proportion of southern partner involvement. The positive involvement of southern partners allowed us to reflect on lessons learned, which included the need to discuss the best ways to take advantage of the perspective of the southern partners in regard to mutual recognition of common issues arising from current and future models of international volunteering. This included the opportunities and difficulties associated with the increased focus on exchanges and twinning programs, and the nature and process of ongoing consultation and connection with partner organisations 'as a whole'.

The Montreal Conference was not able, however, to give high priority to discussing ways forward for better meeting and consulting with southern partners at both the FORUM and IVCO level.

FORUM's purpose speaks to the movement of development service towards increased exchange, advocating and increasing public awareness of international volunteer cooperation, and providing a framework for exchange of information and experience on international development cooperation.

These areas all imply an increased connection with our southern partners. It is timely that FORUM continue to discuss how best to involve our southern partners in the structure and workings of FORUM. Particular issues will be raised below under the headings of membership, information and learning, and research.

Recommendation: That FORUM rename the three functional areas as outcomes, as follows:

- Growing and supporting membership
- Sharing and networking through information and learning, and
- Building a credible body of knowledge through research.

Recommendation: That FORUM reconfirm the three functional categories of membership, information and learning, and research as the core activities supporting FORUM's purpose and decide on the relevance of a further category giving a higher priority to advocating and promoting the benefits of international volunteering and its contribution to poverty reduction and the creation of a more peaceful, sustainable and just world.

Recommendation: That FORUM discuss the nature of the relationship and responsibilities of the FORUM Executive, FORUM members and our Executive Coordinator to increase FORUM's capacity to live out the breadth of its purpose.

Recommendation: That FORUM address the nature and role of the annual IVCO meeting and the mix of regional and sectoral meetings and networks.

Recommendation: That FORUM determine new models of working by FORUM as a whole and in particular in relation to the Executive for the 2009 – 2012 Strategic Plan, which may include portfolio responsibilities, working groups and ex-officio Executive members.

The following sections discuss some of these elements in more detail.

1. Membership

In our current Strategic Plan, **membership** is summarised as:

- an expanding global membership
- an effective level of membership support
- networks at country, regional and global levels.

The critical questions in 2005 were:

- Do we want to change our model of membership?
- Should we have “associate” membership?
- Does our facility for newly-formed associations work effectively?

At that time, FORUM stated its commitment to review its membership approach and the membership model, and to consciously seek to expand and facilitate the involvement of IVCOs in FORUM.

The Membership Review of 2006-07 addressed some but not all of these questions. A revised model of membership was put to the AGM in 2007, proposing two significant changes: a redefinition of umbrella organisations and a fee structure with more categories for fairer fee payment based on annual expenditure on volunteer programs. This was approved for implementation in 2008.

Discussions by the Executive in recent times have canvassed the following:

- Should FORUM consider a category of associate member?
- Is it desirable for our partner organisations to become more involved through membership and, if so, how?
- Is it desirable for supportive individuals, eg. academics and research institutes, to become involved through membership and, if so, how?
- How do we relate to the profit sector?
- How can we expand and sustain our membership globally?
- How can we ensure a strong pool of candidates for Executive succession planning?
- How can we develop FORUM as a true global network of sharing and learning which enhances members' work at the organisational, programmatic and strategic levels?

Recommendation: *That FORUM determine the nature of its approach and action on membership, including the inclusion or not of partner organisations, interested individuals and research institutes as a membership category; and decide upon any new areas of activity.*

2. Information and Learning

In our current Strategic Plan, **information and learning** is described as:

- supporting a website
- holding IVCO as a global event
- increasing the number of regional events.

In 2005, it was acknowledged that more could be done in:

- supporting member-led groups in learning and good practice
- facilitating the sharing of member initiatives.

While FORUM membership fees are now supporting an Executive Coordinator at 14 hours/week, we are at – or close to – our realistic capacity.

Discussions in recent times have canvassed:

- The tension between members wanting to share programmatic issues and initiatives globally and the current use of regional meetings
- The desire of members in regions with fewer members to connect globally, not regionally
- Opening up regional meetings to all agencies globally and renaming them to reflect a programmatic, strategic or sectoral focus rather than the conference location
- Connecting members via email sectoral networks
- Encouraging greater interconnectivity between all staff levels of FORUM members.

The annual IVCO event continues to remain focussed on head of agency and senior staff attendance, and regional conferences or events held under the banner of FORUM, ie. the European Conference, have been designed with a programmatic level of focus in mind. This year there has been a European level conference in Ireland and, while there is a desire to hold regional meetings for the Asia Pacific region, the low numbers of members and travel logistics have made this difficult. The term “regional conference” is an historical one, reflecting the location of the conference rather than its nature or purpose and is no longer relevant as attendees are invited from the global membership.

There is increasingly ongoing discussion as to the future of regional and international events, including their purpose, naming and frequency.

There are a number of proposals being canvassed, including:

- Renaming regional conferences as network meetings, sectoral or programmatic conferences
- Having the annual IVCO meeting every two years and programmatic or themed events in the intervening years
- Confirming IVCO for heads of agencies
- Increasing agency collaboration could be more formally encouraged throughout the year and play a larger role in research and discussion paper development, and the use of the website and email focus groups could be fostered for these purposes
- Identifying ways to involve southern partners in FORUM activities and events, ie. At IVCO, purpose-specific conferences etc.

Recommendation: *That FORUM members begin to discuss these options at IVCO 2008 and give preliminary guidance to the Executive to trial new ways of working to increase opportunities for member involvement across regions; better operate as a global network supporting sectoral work and programmatic staff; and encourage increased opportunities for connections for partner organisations.*

Recommendation: *That FORUM members provide guidance to the Executive on the timing and nature of the annual IVCO Conference to determine a better model, which may include:*

- *Bi-annual IVCO meetings*
- *Annual sector and programmatic meetings/conferences open to global members*
- *Increased opportunities for partner organisations to attend either IVCO or an alternate conference annually with a programmatic focus, or bi-annually with a strategic focus*
- *Meetings addressing issues between members on a particular issue or of a particular regional nature being seen as an adjunct rather than primary focus of any FORUM-organised, -convened or –supported event.*

Recommendation: *That FORUM determine the nature of its focus on the sharing of information, experience and lessons learned; identify the resource implications; make decisions on the role and place of IVCO and regional or other networking meetings, whether real or virtual; and decide upon any new areas of activity.*

3. Research

In 2005, members clearly wanted FORUM to do more in the area of research, and the status of **research** in the current Strategic Plan is for:

- an ongoing trends survey
- FORUM members to invest in one-off areas of research
- members to be supported in their involvement in research activities, eg. UNV research project
- a research fund to be established.

The current Strategic Plan identifies a clear plan for research involving:

- leading on key areas of research related to international volunteering and cooperation
- a three year rolling plan of major research and discussion papers
- research partnerships
- our own research fund
- facilitating member involvement in research projects.

Discussions in recent times have canvassed the following:

- The value and benefits of our increased focus on research and the breadth and depth in the body of knowledge this has created
- The need for research guidelines covering the areas of publicity, sign-off protocols, design principles, ethics and research supervision
- Increased options for joint research with UN bodies and research institutes
- Possible options for philanthropic funding
- The value of partner organisations' perspectives in research activities.

Recommendation: *That FORUM reconfirm its focus and growing strength in research; reconfirm its commitment to the remainder of the current research plan; and decide upon any new areas of activity for 2009-2012.*

Recommendation: *That the value and advice of our partner organisations be more closely integrated into the work of FORUM.*

4. Human Resources

In the current Strategic Plan, our model for **human resources** involves:

- support from individual members on specific projects
- commitment from Officers and Executive
- part-time coordination from the President's organisation.

Our current Strategic Plan identifies the need for:

- a sustained level of coordination and effective membership updates
- a well-managed research program
- a sustained approach to expanding the membership and ensuring a regular service
- proactive approaches to promotional work on international volunteering and cooperation issues.

In 2006, it was decided that FORUM would:

- establish a Coordinator position at a level of hours to be defined, which will be based within a FORUM member
- manage the research program either by outsourcing or through the provision of in-house support.

In 2008, different models of staff support have been developed, the current one being an Executive Coordinator paid out of FORUM membership fees, working 14 hours a week and located at one of the Executive offices, currently AVI in Melbourne, Australia. In addition, Skillshare is paid to oversee the receipt of fees, paid in Euros, and distribution of monies through our banking facilities in Belgium.

Discussions in recent times have canvassed the following:

- FORUM is unable to expend more on Executive support unless specifically funded or as a result of increased membership fees
- FORUM Executive would like to increase opportunities for involvement by member agencies through options of working groups, portfolio responsibilities, increased Executive membership and ex-officio places on the Executive.

5. Financial Resources

The principles in the current Strategic Plan underpinning **financial resources** are that:

- membership subscriptions should cover the cost of information sharing, website update and maintenance, and member and possibly conference support. This includes the cost of the Coordinator position
- the research fund should support trends surveys, research staff time and cost of project proposal development and management
- global and regional conferences should be self-financing or supported by specific grants identified for that purpose, but may be underwritten by FORUM.

In order to ensure we are effective in the management of our financial resources, the plan stated that we would:

- implement a reserves policy
- enhance the research fund from reserves
- review the model of membership subscriptions

Recommendation: *That FORUM confirm the principles underpinning the management of its financial resources and decide upon any new areas of activity.*

6. Constitution

The **constitution** was agreed in 2000 with the aim of establishing an emergent global network and a virtual organisation. In 2005, it was decided that it needed revisiting, both in the context of the original objectives and the vision of FORUM in the future.

The current Strategic Plan identifies the need to make the necessary revisions to the constitution to ensure the arrangements are appropriate for the model of FORUM we are now intending to develop.

Recommendation: *That FORUM Executive confirm the nature of any current constitutional issues and ascertain areas for revision if required, eg. membership categories, role of Executive.*

FORUM Plan 2006-2009

2006			2007			
	Qr3	Qr4	Qr1	Qr2	Qr3	Qr4
	Identify ways of expanding membership	Discuss membership models @ IVCO	Review membership model		Agree new membership model	
	Proactive expansion of membership	Proactive expansion of membership				Proactive expansion of membership
ment on te any rch/studies taken by ers	Increase volume of info & quality of links on website		Regular update & review of website in place			
	Develop ongoing communication with members & enhance use of website		Promote the use of FORUM as an info-sharing network			
		IVCO 2006 Bonn	European Regional conference in Paris		IVCO 2007 Montréal	
ate ers' ement in rch cts	DI do trends survey DI do survey of surveys	Collect info on individual research done by different members			Trawl of members' research activity	
lish 3-year plan	DI to formulate Social Capital proposal		Develop research plan for 2007-08 to replace three year plan	Commission Discussion papers Seek funding for research plan	Discussion papers produced on New Models, Climate Change and Public Engagement	Commission Discussion paper on gender mainstreaming
	Coordinator post established					Review Coordinator arrangements

FORUM Plan 2006-2009

2006			2007			
	Qr3	Qr4	Qr1	Qr2	Qr3	Qr4
ment res policy	Underwrite part of Coordinator salary from reserves					
nce rch fund eserves						
	Revised constitution agreed at IVCO					

2008			2009			
	Qr3	Qr4	Qr1	Qr2	Qr3	Qr4
ing exercise		Report from mapping exercise	Member database developed			
	Expand membership	Proactive expansion of membership				Proactive expansion of membership
nd onic letter ced. To be d on a erly basis			Facilitate inter- agency co- operation between members at different levels			
		Asia-Pacific conference		Regional-level networks in operation		
ean nal rence in n		IVCO 2008			IVCO 2009	
			Review of research progress and planned work in 2009-10			

FORUM Plan 2006-2009

2008			2009			
	Qr3	Qr4	Qr1	Qr2	Qr3	Qr4
Research on partner perspectives commissioned and undertaken		Research submitted to IVCO				
Discussion paper on gender produced	Discussion paper on private sector produced			Discussion paper on monitoring and evaluation commissioned and produced		
Trawl of members' research activity		Trawl of members' research activity		Trawl of members' research activity		Trawl of members' research activity
	Review research progress with UNV		Identify potential collaboration on research with other organisations, including UNV		Review research progress with UNV	
Review of Coordinator role			Review Coordinator arrangements and contracts			
IVCO cover: sharing, te, es, per ort, dinator	IVCO & other conferences are self-financing		Sustainable model on Coordinator post as in vision			
Consultation on the of JM ced	Executive reviews proposals through virtual meetings	Consultation paper taken to IVCO	Review feedback from IVCO and FORUM members and develop new Strategic Plan		New Strategic Plan submitted to FORUM annual meeting for agreement	

Appendix 2

FORUM Financial Plan 2006-09

FORUM Financial Plan 2006-9

This assumes that some research is funded from reserves.

The figures for 2007-2009 are based on the projections for 2006, not the budget.

Item		2006	2006	2007	2007	2008	2009
		Budget	Actual	Revised Plan Budget	Actual	Revised Plan Budget	Budget
Income	Membership fees						
	existing members	18,600	21,588	21,600	18,572	26,600	31,600
	new members	3,000		5,000	1,017	5,000	5,000
	Government grants	5,000		10,000		10,000	10,000
	Conference income (fees)	5,000	225	10,000	13,520	12,000	12,000
	Research fund	25,000	3,594	10,000	500	10,000	10,000
	Other income		148		142		
	TOTAL INCOME	56,600	25,555	56,600	33751	63,600	68,600
Exp'ture	Staff salary	10,000	5,987	20,000	20,000	22,000	24,000
	Pensions and payroll						
	Staff training						
	Staff travel			1,500	459	1,500	1,500
	IVCO support	1,000	1,465	3,000	2,021	1,000	3,500
	Member events	10,000	410	10,000	3,138	12,000	12,000
	Research	45,500	13,135	30,000	3,368	20,000	20,000
	Board expenses	5,000	2,830	5,000	5,341	5,500	6,000
	Stationery						
	Communications						
	Web site and information	1,500	682	5,000	128	2,500	2,500
	Subscriptions	2,500	2,750	3,000		3,000	3,000
	Rent and building						
	Insurance						
	Support Services						
	Accounting	1,100	1,029	1,500	1,077	1,500	2,500
	Bank charges	500	237	500	290	500	500
	TOTAL EXPENDITURE	77,100	28,525	79,500	35822	69,500	75,500
	SURPLUS/(DEFICIT)	-20,500	-2,970	-22,900	-2071	-5,900	-6,900
	Prior year adjustment				-2000		
	Deficit c/fwd to Balance Sheet				-4071		

Notes a) research: it is assumed we will want to have the survey of members each year and other research in 2006 and 2007