

Education Volunteerism White Paper: Solving the Sustainability Challenges of Educational Volunteerism at Scale



USAID/Uburezi Iwacu reading club facilitator from Kicukiro District leading a reading session with supported children; Credit: YWCA Rwanda.

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Executive Summary

The Educational Volunteerism Community of Practice (CoP) has summarized a set of challenges related to the sustainability of scaled education volunteerism initiatives and developed a set of proposed solutions for each challenge. Local stakeholders and large organizations implementing education volunteerism initiatives globally may find the propositions contained herein useful as they navigate these and other challenges. The objective of this paper is to open a discussion between education stakeholders about how to develop sustainable and scalable volunteer initiatives that support learners to achieve their full potential. Education volunteer initiatives represent one way to mitigate the global learning crisis. ***This paper provides ideas about how practitioners and volunteer organizations can better recruit, train, incentivize, and manage volunteers in ways that can be done sustainably at scale.*** The CoP's vision is for a volunteer layered model to be piloted by education-focused international organizations, sparking continued conversation in the field about the best methods to sustainably scale education volunteerism, the effectiveness of these proposed solutions, and other unidentified challenges.

Overarching Challenge: Education volunteerism initiatives are usually implemented by individual organizations focused on a single layer of similar volunteer roles. In most cases, this requires large investments and is neither sustainable at scale nor sustainable after initial funding ends - particularly when organizations work independently to develop their own model. One potential solution is to develop and implement a layered volunteerism model where volunteers from the local community form the first layer of volunteers who work directly with learners. A second layer of volunteers drawn from existing sustainable volunteer service organizations such as Rotary or Lions Clubs, Peace Corps, Corps Africa, UN Volunteers, National Service Programs (NSPs), Faith Based Organizations (FBOs), local volunteer-based organizations, women's organizations, Organizations of Persons with Disabilities (OPDs), or Community Based Organizations (CBOs) can provide support in recruiting, training, monitoring, and incentivizing the first layer of volunteers. If needed, a third layer of volunteers can support the second layer.

Sustaining Recruitment of Volunteers at Scale Challenge: The main barriers to sustainable systems for volunteer recruitment at scale include poorly designed volunteer profiles, recruiting the right volunteers, reaching less traditional or typical volunteers, and identifying/vetting volunteers. Potential solutions begin with the development of a set of clear volunteer profiles that align with community expectations, perceived needs, skills sets, and availability of diverse volunteers in the community. A local organization supported by the organization initiating (and funding) the layered approach to educational volunteerism will need to:

- **Conduct background research** to identify the educational challenges to be mitigated through the educational volunteer model (it may be beneficial to engage mid-level actors here in order to build a system that can be used in all or some smaller communities as needed).
- **Identify existing sustainable service or volunteer organizations** or institutions in the context, develop ideas about the roles each partner might be able to fulfill in the model, and the types of volunteers available in the contexts of the country (as well as their expertise, availability, incentives preferences, etc.). Note that not all communities will have an established volunteer organization, but they may have CBOs.
- **Engage the consortium** to map partner roles, develop potential volunteer models that they could support simultaneously, and further develop the volunteer profiles.
- **Conduct inclusive community engagement activities** (following inclusion¹ and localization² principles) to identify and prioritize educational needs present in the community (recognizing that these will not be universal to all community members) and volunteer availability.
- **Employ a multi-pronged recruitment campaign** through regular local organizations, community platforms, and/or through leveraging Layer 2 volunteers to raise awareness of the volunteer opportunities, actively encourage participation from diverse members of the community (and conduct outreach through multiple, accessible channels), and ensure that communication includes the expectations for each volunteer role.

Working with community leaders or committees and civil service organizations (i.e., OPDs, mothers groups, etc.) through the community engagement process not only helps to solve the challenges of raising awareness and avoiding mismatches in volunteer expectations, it also can ensure inclusion for all potential volunteers and beneficiaries and ease the identification and vetting of local-level volunteers.

Sustaining Capacity Strengthening (Training) of Educational Volunteers at Scale Challenge: The main barriers to sustainable systems for volunteer capacity strengthening (training) at scale include cost of training and training materials, the cost of ongoing support and mentorship, and volunteer retention. In order to solve the challenge of ongoing training needs, program managers and partners must:

- **Determine how to simplify the volunteer role** so that training needs are less intensive and less costly. This could include ensuring the materials they are provided include sufficient and clear guidance on how to enact their roles.
- **Carefully consider which capacity strengthening aspects** need to be face-to-face and which could be delivered through another less costly mechanism.

¹<https://www.usaid.gov/inclusivedevelopment/inclusion-equity>

²<https://cerar.fr/en/localization-in-8-principles/#:~:text=A%20paradigm%20shift%20%3A%20localization%20aims,role%20in%20the%20humanitarian%20system>

- **Determine the frequency and duration of each format of training**, leveraging low/no-cost options when possible, and considering all formats.
- **Develop a plan for how to adapt training content**, such as training new employees in how to adapt content when there is staff turnover, and manage training materials.
- **Leverage Layer 2 volunteers** to provide ongoing training/mentoring for Layer 1 volunteers and support the management and updating of materials.
- **Integrate peer learning experiences**, ongoing career coaching, and carefully planned incentive timing to increase volunteer availability and retention.

Coordinating with local communities and civil service organizations (i.e., OPDs, FBO, CBO, School management committees, women’s organizations, mothers groups, etc.) to train and track volunteers to provide remote coaching and support may ensure volunteers remain in the program and implement the educational activities with quality. Program managers should also be realistic about how long volunteers will be involved in the program, and provide continuous professional development to volunteers in ways that continue to support the volunteers’ career and/or personal goals.

Sustaining Incentivization of Education Volunteers at Scale Challenge: Challenges with incentivization appear to be associated with incentive cost, incentive harmonization across partners and programs, and contextual factors. Incentives can vary across contexts to include monetary or, in-kind donations; training, networking, or coaching opportunities; certifications or progress towards promotion for education professionals (i.e., professional development); social recognition through celebrations; or other recognition of contribution towards an area of work, community, or national goals (i.e., government signed certificates); among others. Different types of volunteers are more motivated by some types of incentives than others. Potential solutions include:

- **Providing different types of sustainable incentives** - monetary and non-monetary to different types of volunteers, or making available different types of incentives and allowing volunteers to select the ones that they prefer as individuals.
- **Leveraging Layer 2 volunteers’ professional skills** to provide ongoing career coaching for Layer 1 volunteers.
- **Establishing agreements across partners and other programs** to harmonize incentive types and limits allows volunteers to know what to expect and contributes to local development work rather than causing conflicts.
- **Ensuring that volunteers receive local support and respect** for the work they contribute to the initiative, emphasizing social recognition.

Introduction

This paper has been developed by the Educational Volunteerism Community of Practice (CoP) with the support of a consultant, Dr. Adrienne Barnes-Story, in an effort to bring together lessons learned from various models of educational volunteerism utilized across the globe by a number of different organizations. The goal of this paper is to explore new and innovative models of educational volunteerism that can be implemented, ensuring learning outcomes can be sustained at scale, and ultimately serving as one of the successful mitigations against the global learning crisis. The Educational Volunteerism CoP is made up of international and local NGOs, private sector education companies, volunteer service organizations, and other members who are focused on working with and through volunteers to improve educational outcomes. Many recommendations in this guide are new – and as of yet untested - ideas drawn from discussions and brainstorming sessions of the Educational Volunteerism CoP and/or working group meetings. The Educational Volunteerism CoP envisions this paper as an aspirational framing document to spur innovative and strategic designs for educational volunteering, and a springboard to create more detailed guidance (check the [mEducation Alliance \(mEd\)'s Educational Volunteerism CoP page](#) for the latest information) that can and should be updated over time as these and other ideas are piloted and refined.

The Educational Volunteerism CoP decided to develop this paper because, even though many of the group's members have had success in improving students' learning outcomes via volunteer-facilitated activities within the context of short-term educational projects, there are few examples of these types of educational volunteer programs being sustained at scale. The members of the Educational Volunteerism CoP believe that combining and leveraging the best of the many different models of educational volunteerism will better support students' learning outcomes sustainably at scale.

Overarching Challenge

Once educational volunteer programs have been shown to improve students' learning, the next big goal is for the program itself to become self-sufficient and sustainable, allowing for continued improvements in learning outcomes. Sustainable programs are those capable of lasting beyond the time frame when external funding is provided or those that are designed as sustainable from the get-go. Sustainable programs respond to demand-driven needs and are financially (or otherwise) supported year after year to maintain or increase the number of volunteers annually, demonstrate tangible impact on target populations, and achieve program uptake by other organizations in the community - including adoption by local government authorities, churches, civil society organizations, and other education stakeholder groups.

Many educational volunteer organizations and/or initiatives focus on working with one type of educational volunteer and/or through one volunteer role - such as a community-based, longstanding instructional volunteer (i.e., a community reading club volunteer). However, there may be large recurring costs to the recruiting, capacity strengthening (training and/or professional development), and/or incentivizing of this one type of volunteer. Experience has shown that volunteer initiatives focused on a single type of volunteer or volunteer role are often difficult to scale and sustain after the life of the project, and may be exclusive of non-traditional volunteers who are unable to commit or adapt to the heavy requirements of the role. Another challenge to the sustainability of educational volunteerism initiatives that are focused on a single type of volunteer is the common expectation that these initially recruited individuals will volunteer for unrealistic durations of time and/or will devote a significant amount of time to supporting educational volunteer activities. Both of these expectations are unrealistic in most contexts.

Overarching Potential Solution: The Big Idea

*Rather than each education program working alone to develop a volunteer-based support system for children's educational outcomes that is ultimately dropped at the end of each project, **education programs should work in partnership with several different organizations, particularly volunteer-focused (service) organizations, to create a layered model of volunteerism.** In a layered approach, Layer 1 volunteers directly support learners and Layer 2 volunteers support the recruitment, capacity strengthening (training), incentivization, and/or management of Layer 1 volunteers. Additional layers of volunteers may strengthen the model.*

To create a truly sustainable and scalable educational volunteer initiative, **it may be necessary to plan for different types of volunteers and volunteer roles that incorporate different types or areas of skills and expertise, varying availabilities, and diverse interests** - and then **layer those volunteer roles such that one volunteer's service may serve as the motivation, capacity strengthening (training and/or professional development), management, or incentivization for another volunteer.** This may lead to a more sustainable volunteer system overall; however, this will likely require an external donor to fund an organization to take the lead in, and be accountable for, developing the layered model and ensuring that all partners receive necessary capacity development to continue the model after the external funding is phased out.

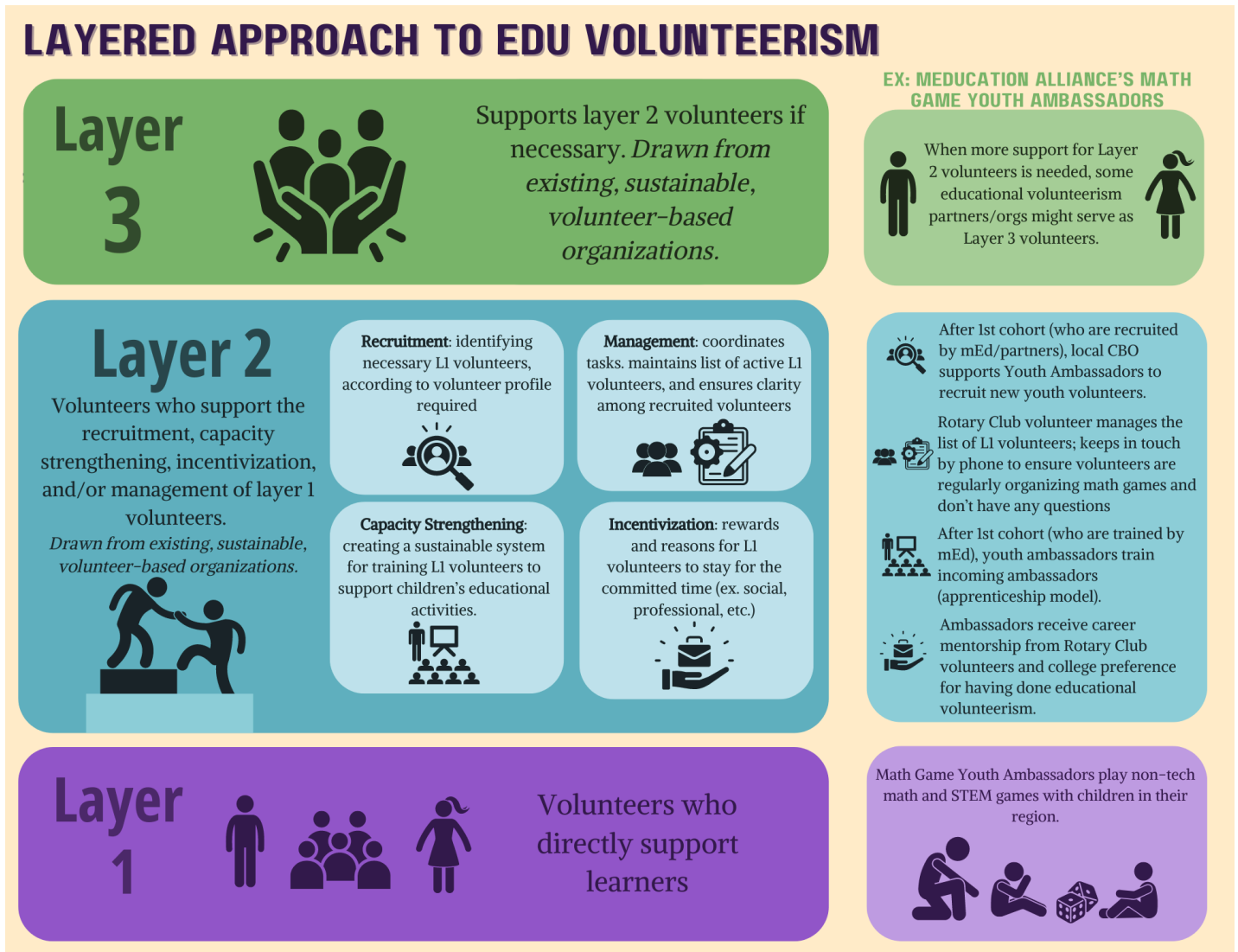
The exact layering structure and combination of volunteer types and roles will be dependent upon the specific context of the initiative. Across contexts, other aspects of the initiative will vary, such as

what motivates different types of volunteers, what volunteer-facilitated/led educational activities are needed, what resources are available, and what service organizations are present and operational in the area. However, the foundational principle is to carefully design a feasible and sustainable overarching educational volunteer initiative model that will best leverage and account for the expertise, needs, availability, and motivations of each type of volunteer and each service organization. A key to ensuring the scalability and sustainability of such an approach is that the **upper layers of the volunteer model (i.e., Layer 2 and/or Layer 3 volunteers) should be drawn from existing, already sustainable, volunteer-based service organizations or initiatives** and/or other like-minded organizations that are present within the country. These might include organizations such as Rotary or Lions Clubs, Peace Corps, Corps Africa, UN Volunteers, National Service Programs, FBOs, local volunteer-based organizations, CBOs, etc. In forming a consortium of sustainable educational volunteerism partners, it will be essential to clarify the ways in which the educational volunteerism approach will align with each partner's mission, goals, vision, and way of working. This will ensure that proposed approaches will fit within the partners' existing and typical annual work plans and budgets. During this process, the consortium must determine the partner that is accountable for each aspect of the layered volunteerism approach. Initially, the externally funded partner may be accountable for building and empowering the consortium, but for the model to become truly sustainable, the accountability must pass to a local entity (e.g., the Ministry of Education, a decentralized regional government structure, or a long-standing organization like a religious network). See Figure 1 for an infographic visualizing this model.

In this proposed model, rather than identifying an organization able to budget indefinitely for financial or other incentives for Layer 1 volunteers (who directly support the learners), the recruitment, incentivization, capacity strengthening, and management of Layer 1 volunteers can be provided by Layer 2 volunteers and/or through simplification of the original L1 role. For example, Layer 2 volunteers might be Rotary Club mentors who provide monthly career mentorship calls or other forms of motivation as an incentive to continue volunteering (see the Math Game Youth Ambassador example on the right side of Figure 1 above). Theoretically, this layered model of volunteerism will be more scalable and sustainable than current approaches, since the Layer 2 volunteers will help to solve the scalability and sustainability challenges of ensuring Layer 1 volunteers have sustained support, management, and incentivization. Since the Layer 2 volunteers are drawn from organizations and institutions that already have reached some level of scalability and sustainability, they may only need some start-up support, that could be provided through an educational NGO through a donor-funded project, to: 1) establish the layered volunteer model; 2) recruit Layer 1 volunteers; and 2) receive initial training, resources, and organizational guidance necessary to support Layer 1 volunteers (including training on volunteer management). In cases where more on-going support of Layer 2 volunteers is required, some organizations and/or

educational volunteerism partners might serve as Layer 3 volunteers to provide additional coaching to Layer 2 volunteers. Ideally, each layer of the volunteer roles will be simplified enough to reduce the need for additional layers of volunteers.

Figure 1. Layered Approach to Volunteerism Model



After considering existing models and volunteer organizations available in a particular context, education practitioners accountable for collaborating with the Ministry of Education to initially build the consortium should consider which of the identified organizations might be a good fit for partners in their educational volunteering initiative. This process should include examining the extent to which each partner will be able to reach a diverse cross-section of potential volunteers. Collaborating with key stakeholders along the spectrum of international, national, regional, and/or local levels is at the heart of developing educational volunteer approaches that can be scaled and

sustained. If only one project/organization develops volunteer-facilitated learning activities for children in communities, then when the project/funding ends there are a myriad of barriers to the sustainability of such activities. Alternatively, working with multiple and different types of partners to establish and sustain educational volunteer initiatives at scale has the potential to leverage the strengths of each partner organization. This will also allow for more cost-effective and relevant educational volunteer approaches that reduce the number of barriers to sustainability.

In order to operate such a model at scale, at least one of the already sustainable local partners will need to take the lead on engagement at the community level and ideally, the community engagement processes will also align with the principles of localization and inclusivity (ensuring the local community is engaged in decision-making processes, and that the initiative both respects the local culture and includes populations at risk of discrimination and marginalization, such as parents with disabilities or individuals from minority language groups). This kind of community engagement will be key to ensuring community buy-in for the educational volunteerism approach. The community must trust the volunteers enough to contribute to the sustainability of the model and send their children to participate in the volunteer-facilitated educational activities.

Since parents of different children will assess risk and benefit of participation differently, it is important that the volunteers be trained and volunteer activities be designed with diverse learners in mind. For example, programs should not expect that parents of children with disabilities will trust that their child will be supported by and benefit from participation in the volunteer activity; accommodations must be made thoughtfully and shared transparently. An inclusive and localized model of community engagement for educational volunteerism should also ensure the educational volunteer approaches do no harm in communities. There is some potential tension with the idea of having such a localized approach at scale. Partners will need to carefully design their educational volunteer approaches with guidance that is flexible enough to adapt to the priorities of individual communities while clearly communicating what each of the partners can (and cannot) commit to supporting at various degrees of scale in the long term.

The Educational Volunteerism CoP recognizes that developing and running such a layered model of volunteerism will take more time than is typically allocated to a project-level educational volunteer initiative, especially in terms of start-up and launch time. However, the authors posit that in order to create a truly scalable and sustainable educational volunteer initiative, this up-front investment of time and energy (accomplished through the injection of external resources) is well worth the effort. The authors also anticipate receiving feedback on programs that pilot this approach, with the goal of engaging those organizations in the development of more detailed guidance for implementing a layered educational volunteerism model.

The Educational Volunteerism CoP also recognizes that there are several additional assumptions underlying this layered volunteer model including the assumption that the educational volunteer initiative is operating in an environment that has strong enough government and civil society institutions to be effective at these various layers. It is less clear if this type of layered volunteer model would be feasible or recommended in some types of fragile contexts in which there is less stability of local institutions. Moreover, this approach assumes that the educational volunteer model is designed in such a way that it benefits and supports the growth of the community organizations (FBOs, CBOs, OPDs, etc.) as well as the other consortium partners that support the educational volunteer model. It also assumes that educational volunteer roles that are developed through this model are designed to be realistic for the available time and to match the capacities of the local pool of volunteers, while still meeting the educational goals of the initiative. It also includes the assumption that this educational volunteer model will be designed to fit within or build upon culturally familiar models of volunteering and education to more smoothly match the needs and expectations of the context. While not all the assumptions of the model have been addressed in this white paper, the Educational Volunteerism Community of Practice recognizes that assumptions are critical for success and will provide a more complete list of assumptions in future guidance.

Challenges in Sustaining Recruitment of Educational Volunteers at Scale

When scaling educational volunteerism programs, implementers may experience difficulty building sustainable recruitment systems due to community-level ideas about what is required from and for volunteers. The main barriers to sustainable systems for volunteer recruitment at scale include poorly designed volunteer profiles, recruiting the right volunteers, and identifying/vetting volunteers. While the managers of small projects can easily collaborate with community leaders to identify potential volunteers and ensure they are known to be trustworthy within their communities, this becomes much more difficult to do efficiently and cost-effectively at scale. Additional effort is also required to ensure that potential volunteers represent a diverse cross-section of the community, and opportunities are not restricted to only the most engaged, majority group members. Depending on the tasks to be assigned to educational volunteers, there can be a further challenge of identifying which volunteers have the skills required for each volunteer role.

A common challenge in educational volunteer recruitment is that the recruiters and the communities/potential volunteers sometimes have different ideas about what the volunteers will do, how long they will commit to doing it, the types of incentives they may receive for volunteering, etc. This becomes a challenge for recruitment processes because volunteers may be quick to drop out if their expectations aren't met. This results in a need to recruit new volunteers at unplanned

times, and in operational challenges around training new volunteers who may have joined after initial capacity strengthening (training) sessions have been completed. Therefore, it is important to carefully design and describe the volunteerism opportunity and systems of working.

Potential Solutions for Sustaining Recruitment of Educational Volunteers at Scale

Poorly Designed Volunteer Profiles - Potential Solution

In order to solve the challenge of volunteers not being aware of the expected volunteering responsibilities and commitment, it is first vital to develop a set of clear volunteer profiles that align with community expectations, perceived needs, and skills sets (and availability) of volunteers likely existing in the community. However, to create volunteer profiles at scale and within a layered volunteer approach (that will hopefully lead to the sustainability of the educational volunteer initiative), project managers and local stakeholders will likely need to plan for a multi-staged process for defining local volunteer profiles. The process may look something like the following.

Stage 1: Complete Background Research

The organization initiating the layered approach to educational volunteerism will need to: 1) complete an initial round of situational analysis research to consider which of the educational challenges the organization would like to focus on mitigating through the educational volunteer model; 2) research and map out existing service, volunteer, civil society groups (including OPDs) and other like-minded sustainable organizations or institutions in the context, and determine with which they can potentially partner; 3) develop initial ideas about the roles each partner might be able to fulfill in the model and in which parts of the country; and 4) complete initial survey research into the types of volunteers available in the contexts of the country, as well as their expertise, availability, incentives preferences, etc. This last part will ideally include sampling of many potential types of volunteers, including youths, stay at home mothers, retirees, professional or skills-based volunteers, representatives of traditionally marginalized groups, and others.

Stage 2: Develop a Volunteer Model

The consortium of partners should then collaborate to analyze the strengths of each partner, map partner roles, develop potential volunteer models that they could support simultaneously, and further develop the volunteer profiles. Findings from research conducted in advance of these brainstorming sessions can be discussed to ensure that proposed ideas for volunteer models and profiles align with the reality of volunteers' availability, capacity strengthening (training and/or professional development) needs, and motivators. During this time, the national/regional partners will need to determine how the larger/scaled approach will translate to local-level activities.

Partners may need to develop more than one potential volunteer model and set of roles to address local needs, ensure accessibility for different potential volunteers (for example, volunteers with disabilities may require specific accommodations), and define the level of local malleability within the proposed roles of educational volunteers. This will ensure flexibility for communities to choose the model and set of roles that works best for their priorities and within their constraints. All proposed models should plan for relatively short cycles of volunteer service in order to avoid unrealistic expectations on volunteers' time. As much as possible, the volunteer roles should be simplified to reduce the need for extensive capacity strengthening and/or incentivization, and the cycles of recruitment should be planned for realistic and regular cycles of volunteer service to reduce the costs and complexities of unplanned turnover.

Once national and regional partners have been identified and roles clarified, the initiating organization will need to develop the process for Stage 3, co-designing guidance with these partners on how to engage with communities at the local level. These higher-level planning activities can be implemented utilizing workshops, informal meetings, desk review activities, or by hiring consultants to help draft guidance. All planning activities should respect the preferred ways of working of the various partners and any budget or time constraints they may have.

Stage 3: Community-Level Coordination

Once the national-level coordination efforts are complete, it will be necessary to focus on community-level coordination efforts. Following inclusion and localization principles, partner(s) charged with community engagement will conduct a series of activities with representative groups from local communities and/or an inclusive advisory board (core group of community members) to identify and prioritize the community's educational needs. They will then discuss potential solutions for addressing prioritized educational needs, including whether or not educational volunteerism is the right solution for any of those needs. Within these discussions, the partner(s) can present the educational volunteer model and roles that the consortium is prepared to sustainably support, with a focus on how the layered approach will leverage already sustainable structures to recruit and support local layer 1 volunteers. Discussions should focus on how the layered model will be supported, the roles and responsibilities of all stakeholders, expected outcomes of the initiative, methods to ensure accessibility and inclusivity throughout the volunteer cycle, ways of tracking learner progress, and any other relevant aspects of the initiative. This is the stage where final decisions about the volunteer model and roles to be implemented will be made. The consortium partner(s) leading the community engagement processes will then coordinate with the consortium of educational volunteerism partners on these decisions. Of course, individual communities can opt-out or develop their own home-grown solutions at this stage.

Partners need to watch out for unrealistic expectations of volunteers' time, particularly for layer 1 volunteers. At the community engagement stage, communities and local service organizations or FBOs can conduct surveys to find out optimal volunteer recruitment cycles and the amount of time volunteers will have available to support the initiative - and at what frequency and duration. Volunteer surveys that include questions about volunteers' other time commitments (such as family responsibilities, work responsibilities, etc.), and needed accommodations can help indirectly determine realistic volunteer expectations. It's common for people who are passionate about children's learning to overestimate how much time they have available for volunteering activities. Surveys can help determine which types of educational volunteerism are likely to be most sustainable for the context, as well as to identify potential incentives that would be more likely to motivate volunteers (and whether those incentives could be sustained through partnerships over time).

Recruiting the Right Volunteers - Potential Solution

Co-defining a volunteer profile in a multistage process, including with representative groups from communities (during stage 3, above) should help to increase the recruitment of volunteers who match the program needs. However, to fully solve this issue, a clear plan for dissemination of information about each volunteer role should be developed and implemented. The advisory group or partners, likely together with community leaders, will need to employ a multi-pronged campaign to raise awareness of the volunteer opportunities and ensure that communication is accessible and includes the expectations for each volunteer role. A combination of approaches will reach the widest variety of audiences. Community, school, and local group leaders (OPDs, women's groups, faith leaders and NGOs) can publicize the volunteer opportunities (and expectations) among their constituents via their typical communication channels: meetings, WhatsApp groups, phone calls, social media accounts, etc. These groups can focus on how the good work they are already doing will support the educational program without any outside financial support or other programmatic inputs beyond the initial investment. Later incentivizing activities, such as volunteer award ceremonies, thank you initiatives (written, verbal, or another form that is common in the culture), and other forms of recognition, may also function as another form of awareness raising, thereby increasing the effectiveness of future volunteer recruitment cycles.

National, regional, and/or local partners may conduct social media, megaphone, radio, and/or TV campaigns to spread the word about the volunteer opportunities. These messages can be in print for dissemination through church/FBO messaging platforms or local community meetings. They can also be audio recorded for dissemination over the radio or via local megaphone transmission. Messaging campaigns can use role model volunteer interviews or testimonies, prominent leaders' appreciation of volunteer contributions, and other ways to draw attention to the program. This

approach not only attracts new volunteers, but also serves to incentivize and motivate existing volunteers. In terms of sustainability for recruitment, this approach requires an initial investment geared towards setting up a collection of social media options (advertisements, videos, WhatsApp flyers, radio scripts, etc.) that can be reused, adapted, and serve as templates for future recruitment activities. This collection of templates, files, and media should be housed within a longstanding institution (e.g., the MoE directorate in charge of community and parental involvement), but be available to any local partners involved in educational volunteerism initiatives. Layer 2 volunteers may support the continued recruitment process by providing support to the local institution to revise and update templates, continue to test local messaging, and collect/share data around effectiveness of recruitment campaigns.

Identifying and Vetting Volunteers: Potential Solution

Working with communities through the community engagement process not only helps to solve the challenges of raising awareness and avoiding mismatches in volunteer expectations, it also can ensure ease of identifying and vetting local level volunteers. This is because local community members can nominate or encourage potential volunteers who they know personally to apply, which besides being a cost-effective word-of-mouth approach to recruitment also allows for an informal level of vetting by the community.

In the recruitment process for local level volunteers, partners should be sure to include diverse representatives who are likely to be long standing in the community. In some contexts, this will be the Head Teacher or an education or locally elected official, and in other contexts it might be a different role such as a tribal leader, chief, cultural leader, or head of a local civil society organization. The key is to have someone whose position doesn't rotate often and who can provide continuity in the recruitment processes. If volunteers are drawn from outside the local community, Layer 2 volunteers working through FBOs, CBOs, OPDs, and Service Organizations can be helpful for recruiting volunteers at scale. This is because these organizations tend to have large networks within which they can more easily conduct volunteer identification and vetting processes - either via recruiting volunteers from within their own network or by asking members to collaborate with local leaders to identify volunteers at the community level.

For regional or national level selection of volunteers, local recruitment should be combined with a nationwide but efficient system as a double check for both volunteer vetting and management, such as, an application system (e.g., online or SMS or IVR based) managed at the national level by Layer 2 volunteers in partnership with a ministry or other national-level stakeholder. For example, interested volunteers could submit an expression of interest or application form. This means the program manager, advisory group, and/or partners would need to establish a template for a digital intake form that local communities can adapt according to their agreed upon characteristics and

expectations for volunteers. The structure of the intake form will be determined by the platform in use, and the provision of multiple options/mechanisms for applying to be a volunteer would be more inclusive. Partners will need to consider which platforms would be most accessible and inclusive, and can be used long term that guarantees data protection/privacy and at a minimal cost. Ideally, partners will build recruitment systems into existing institutions (and link them with different sustainable volunteer organizations or models within the context) for sustained recruitment of new volunteers over time. Layer 2 volunteers can continue to support this system of recruitment, providing updates and training as needed.

The application system for national level volunteer recruitment should include some level of official background checks, particularly for Layer 1 volunteers working directly with children. The exact background checking process will depend on the context and funding availability, and the program should at a minimum provide or link to a national hotline for people to report any concerns with volunteers that may arise. Whatever nationwide background check process is used, it should not be a roadblock to volunteer recruitment. The system for vetting volunteers and looking into their background should be tested to ensure the actors in charge of this step can complete the recruitment process in a reasonable amount of time within their existing budget and responsibilities.

Once the pool of applicants has been collected, then national, regional, and local partners can work with communities to create a fair selection system from the volunteers who have been nominated. In-person meetings should take place within communities for local volunteers via existing platforms and/or at local institutions like School Management Committees (SMCs), Parent-Teacher Associations (PTAs), or other civil society meetings. This will ensure that the person is seen as someone with integrity within the community and that the selection process is seen as transparent and fair. The emphasis here should be the creation of a system that can be sustained over time. For example, it may be the PTA/SMC (with representatives from key groups) review the nominations, using a pre-established rubric and process, and select the volunteers for this cohort. This process could be added to the annual work plan so that it remains a sustained activity and/or the responsibility of the group over time, with Layer 2 volunteers continuously supporting the ongoing process. NGOs or service organizations may need to advocate or negotiate with the appropriate ministries to ensure recruitment responsibility remains a key part of the chosen group's annual tasks. NGOs will also need to consider how to organize these processes with local partners so that they are feasible within their existing schedules and budgets. This may require coordination amongst several different partners, with the responsibility of contributing staff time for that coordination rotating among partners from one year to the next. During the life of a project, an international/national NGO may provide the upfront costs for developing online/digital, Short Message Service (SMS), Interactive Voice Response (IVR), or some other vetting system - as well as

coordinating between partners to test systems until a viable and sustainable solution is found. Layer 2 volunteers may be able to provide technical expertise to upgrade the process for background checks.

Challenges in Sustaining Capacity Strengthening (Training) of Educational Volunteers at Scale

Building a sustainable system for training volunteers at scale can be difficult. The main barriers to sustainable systems for volunteer capacity strengthening (training and/or professional development) at scale include the cost of training and training materials, ongoing support and mentorship, and volunteer retention. For most educational volunteer initiatives, Layer 1 volunteers (those who work directly with learners) will need to receive at least some level of face-to-face (F2F) training for certain aspects of capacity building. F2F training is expensive to implement at scale and to sustain without external resources. This is particularly challenging when volunteers fill roles with large time commitments that hope to have higher potential impacts on learning outcomes through increased dosages. Volunteers require ongoing support, coaching, and mentorship that is potentially difficult to sustain without a steady flow of resources to support the coaches' time, travel, and motivation. Program managers must also consider volunteers' career and life goals - and how their volunteer work aligns with and supports those goals. One challenge related to this is when volunteers leave for a job as soon as they are fully trained to support the program, causing unexpected vacancies and additional recruitment and training challenges. Volunteer availability often changes, particularly when their employment status changes. These changes in availability may impact volunteers' ability to attend training sessions and continue supporting the program.

Potential Solutions for Sustaining Capacity Strengthening (Training) of Educational Volunteers at Scale

Cost of Training and Training Materials - Potential Solution

As compared to teachers, educational volunteers may need more training and ongoing support with basic classroom/child management techniques, instructional pedagogy, and/or implementing new or unfamiliar learning activities. In order to solve the challenge of the cost of training and training materials, program managers and partners (often together with local advisory boards/community groups) must first determine how to simplify the volunteer role so that training needs are less intensive and less costly. Together, they can carefully consider which capacity strengthening aspects need to be face-to-face (F2F) and which could be delivered through another mechanism. Program managers need to determine the frequency and duration of each format of training, leveraging

low/no-cost options when possible, and considering all formats and accessible options: F2F radio, Interactive Voice Response (IVR), Short Message Service (SMS), WhatsApp, peer mentoring, mentoring by retired teacher/local leader, exchange visits, apprenticeship model, pool of past volunteers, etc.

Layer 2 volunteers may be able to support training that incorporates apprenticeship and shadowing models - slowly transferring responsibilities from one volunteer to the next. This is similar to peer learning, where a new volunteer works alongside the existing volunteer for a period of 1-3 months and takes over the role, reducing the need for the new volunteer to attend training sessions. Layer 2 volunteers might also work with a local ministry or other national organization to compile and maintain a list of volunteers who have already been trained so that partners are able to utilize a pool of people who can provide training for new recruits or fill short-term gaps as new recruits are being trained. The Ministry of Education can then leverage these human resources for new education projects or for mentoring new volunteers, as they will likely require less training than new volunteers.

There are a few topics that are essential to address with educational volunteers before they are permitted access to children. This includes thorough training on child protection policies and protocol (there will need to be a screening and training process focused specifically on ensuring child safety), an introduction to the organizations/partners leading the educational volunteer initiative/program, and various other expectations for performance (i.e., working hours, compensation, reporting, travel, protocols, etc.). After passing through training on these core components, volunteers are trained on how to lead the various parts of the initiative, and may or may not support scale-up of the program. Ideally, additional sessions will include training in positive discipline and positive child management practices, as well as soft skills such as listening to the needs of the communities being served, how to receive validation from the community that what is being offered is what is needed, understanding/developing cultural competencies, etc. Layer 2 volunteers can likely provide initial and ongoing training in these important areas, particularly around child protection policies and safeguarding protocols - or at least provide continued support to government entities around these areas.

The process for training materials development and ongoing maintenance of those materials can also be costly. The goal is to develop accessible training content in line with Universal Design for Learning that is flexible, offers choice, and is adapted to 1) the level of education the volunteer has achieved; 2) the particular learning context; and 3) the target learners' instructional needs. Member organizations of the consortium may require training for their own staff from the initially implementing organization to raise their members' capacity to develop appropriate materials. The plan for training materials development must include translating the training content and any

materials into local languages and accessible formats, and adapting activities to locally available materials, games, or cultural expectations (e.g., creating lists of songs, games, etc.). Preparing in this way supports easier replication of materials by volunteers in the future.

Whatever content or platforms are used, the institution(s) leading and sustaining the training activities (i.e., Layer 2 volunteers/organizations) will need to develop a plan for how to adapt content as needed, as well as train new employees in how to adapt content when there is staff turnover. Partners can co-develop a self-assessment that volunteers can use and share with trainers, mentors, and coaches. This will help the program manager determine volunteers' capacity and decide how and when to connect volunteers with local actors such as classroom teachers or head teachers.

To ensure sustainability at scale, conversations around how capacity strengthening costs (particularly for the F2F components) will slowly be shifted from any external funding and management sources to the local partner or Ministry of Education (MoE) should take place at the onset of the program. Early in the program, partners and the MoE will need to identify the model for transferring responsibility so that all partners and the MoE can be involved in decisions around training, increasing the potential for design sustainability. Topics of discussion should include who will be in charge of the sustained activity and how/when any recurring costs will shift. This way, before the end of the project, local partners and the MoE are already financially sustaining the volunteer-based educational activity. Some ideas include collaborating with local NGOs, CBOs, FBOs to use their existing volunteer programs, or collaborating with international/regional volunteer organizations such as Peace Corps or Rotary International to get their long-term commitment for Layer 2 volunteers to provide regularly timed training sessions for Layer 1 volunteers and update training materials as needed.

Another option is to collaborate with private companies to determine how their strengths could be used to benefit the community educational activities. This may be through donating their staff time as volunteers, donating funds or platforms to support the capacity strengthening activities, etc. Telecom companies may be able to support IVR/phone/SMS-based capacity strengthening activities. TV or Radio partners might support the capture of audio/visual materials for the development of training materials. Information-Communication Technology (ICT) partners may support a website that houses the developed training materials. Local hotels might be willing to donate space for training activities to take place at certain intervals or provide short internships (as incentives) for volunteers who complete their volunteer cycle. Program partners will need to think creatively to ensure a successful and sustainable program.

Ongoing Support and Mentorship - Potential Solution

One key resource to include to support the training and follow-up of educational volunteers is the initial set of materials for the volunteers to use (i.e., a book bank and/or basic math manipulatives,

images/materials to use in parent workshops, etc.) and guides (essentially lesson plans) for the child or parent directed learning activities (reading/math/STEM clubs for children, parent workshops, etc). These guides could be locally adapted from a bank of resources, and in some contexts, community volunteers may be able to create their own, following the model of each step of the club/session. Depending on the context/project, regular follow up can be provided by Layer 2 volunteers drawn from international and/or local partner organizations and local school leaders (school directors, head teachers, etc.). These Layer 2 volunteers can conduct site visits and coaching for Layer 1 volunteers (whether in person or remote via phone, WhatsApp, etc.). Depending on the length of the project and funding available, refresher training workshops and/or peer learning meetings (remote or in person) may be possible. However, a sustainable set of Layer 2 volunteers can provide individualized ongoing mentorship.

When scaling up training, local partners should lead coordination with local communities to train and track volunteers. Phones (SMS, phone calls, WhatsApp) can be used to stay in touch with trained volunteers and provide remote coaching and support. All partners should envision sustainability from the beginning – considering how initial and refresher training budgets can be replaced in the long run through the integration of Layer 2 mentorship roles into existing localized Ministry of Education (or other government or volunteer organization) roles.

It can be easy for Layer 1 volunteers to feel abandoned and lose motivation if there isn't regular follow up to give them feedback and build their confidence that they are applying the approaches as intended. Partners may need to test out different models for the ratio of Layer 1 volunteers to Layer 2 mentors to ensure Layer 1 volunteers receive sufficiently regular feedback. Partners will also need to work with schools, school leadership, PTAs, FBOs, CBOs and/or volunteer-based service organizations to explore who realistically can fulfill the Layer 2 volunteer roles during and after project funding ends. Ideally, volunteers will see themselves reflected in their mentors as well, helping to build trust and openness between them. Where mentors with pedagogical expertise (to give specific feedback on the implementation of the learning approach) are not available, it may still be valuable - from a social-motivational perspective - to have mentors who can observe the volunteer-facilitated learning activities and act as cheerleaders of the volunteers (a type of incentivization).

Volunteer Retention - Potential Solution

It may be helpful to align the training session content with potential professional pathways (i.e., to become a teacher or apply to an NGO) in order to increase Layer 1 volunteer retention; however, this often results in trained volunteers leaving the program for a paid position. Partners need to be realistic about how long Layer 1 volunteers will be involved in the program, and how volunteer

experiences lead to professional success (i.e., gainful employment). Ideally, other community members will observe this success and be willing to invest their own time into the volunteer program in order to become more successful themselves.

Volunteer initiatives may be able to reduce turnover by providing continuous professional development to Layer 1 volunteers in ways that continue to support their career goals. Volunteers can be offered a reduced volunteer task load (e.g., provide mentorship support to new volunteers) when they become fully employed in order to continue to contribute to the initiative and also continue to receive career support. Partners should consider the timing of incentives and additional training for volunteers. For example, by providing income-generating or time-freeing incentives up front (i.e., a grain mill that reduces the amount of time women must spend preparing food), partners can benefit from additional volunteer availability. Alternatively, by partnering skilled (or professional) Layer 2 volunteers with Layer 1 volunteers to provide career counseling sessions after 6 months of service to the program, partners can leverage longer Layer 1 volunteer commitments. Much support will be required from Layer 2 volunteers, so it is imperative that the organization accountable for building the consortium carefully considers what each partner can contribute.

Peer learning exchanges (organized by Layer 2 volunteers) will provide opportunities for Layer 1 volunteers to interact and share lessons learned and new ideas (in-person, WhatsApp, etc.), and may serve to increase Layer 1 volunteer retention. Peer-learning activities could be combined with existing activities in community plans - such as annual celebrations at the sector/district level - where many people might plan to travel to a central location anyway. Other creative, feasible solutions should be developed to enable peer learning exchanges among Layer 1 and Layer 2 volunteers. Creating a bridge between schoolteachers and volunteers - and building connections that focus on a common interest will allow volunteers to be supported through the existing education system.

Challenges in Sustaining Incentivization of Educational Volunteers at Scale

Motivation is an important aspect of education volunteerism, so finding scalable ways to incentivize volunteers is a critical component of any sustainable program model. One of the most difficult aspects of volunteerism is finding the balance between providing an incentive that motivates volunteers and providing an incentive that is sustainable and contextually appropriate.

Incentivization based on financial resources can become expensive quickly, and volunteers who do rely on financial rewards may quit the program when they find a secure source of income. Financial incentives are often not sustainable because once the project ends, local entities are unable to

continue providing these incentives, resulting in an end to the volunteerism. It's also difficult to financially incentivize volunteers when the program requires a large amount of time, which is another reason to simplify what is expected of volunteers as much as possible. If financial incentives offered are too small, volunteers may become demotivated (as compared to no expectation for financial incentives - however, in some contexts, volunteers are happy with even a small incentive). Different organizations or NGOs sometimes provide different incentives (i.e., differing financial incentives for honorariums, transport, meals, education, etc.) which is often viewed as unfair. It is important to determine local perceptions of incentives without assuming that economic incentives are the most appropriate - no standard incentive structure will be acceptable, fair, or culturally appropriate for all contexts. Therefore, Layer 2 volunteers and consortium partners must gather input from the Layer 1 volunteers themselves about their motivations and needs before working with partners to decide on an incentive plan. The consortium should consider not only the project's resources and volunteer requests, but also the culture of incentivization in the local context. The goal is to bring in new volunteers to support interventions, not to disrupt existing systems that work to support the community or to lure volunteers from another project. The main barriers to sustainable systems for volunteer incentivization at scale include incentive cost, incentive harmonization (defined below), and contextual factors.

Potential Solutions for Sustaining Incentivization of Educational Volunteers at Scale

Incentive Cost - Potential Solution

Incentives can vary across contexts to include monetary or in-kind donations; training, networking, or coaching opportunities; certifications or progress towards promotional process for education professionals (i.e., professional development); social recognition through celebrations; or other recognition of contribution to an area of work, community, or national goals (i.e., government signed certificates); among others. Additionally, different types of volunteers may be more motivated by some types of incentives than others; thinking back to the volunteer profiles previously discussed, it's possible that youth volunteers may be more motivated by training opportunities that could lead to future careers such as digital literacy courses or career-based mentoring. On the other hand, stay-at-home caregivers or retired teachers may be more motivated by social recognition, knowledge gained about how to support their children's/grandchildren's learning, in-kind donations, or something else. Preferences will also likely vary at the individual level. For this reason, it's essential to include questions in volunteer survey activities that will help identify the benefits that the target groups of volunteers desire most, and where possible, offer choices to volunteers.

Outside of direct incentives, it is important to consider how to avoid possible disincentives to volunteers. For example, volunteers who don't have enough learning materials to run their activities as planned may end up frustrated and feeling unproductive, which could lead to volunteer dropout. Likewise, volunteers who don't receive sufficient feedback or support from mentors, coaches, or trainers on how they are implementing the learner-directed activities (or who don't receive information about children's learning progress in response to their efforts) may lose motivation over time.

An interesting aspect of the layered model is the inclusion of professionals dedicated to service at Layer 2 (and, potentially, Layer 3). The professional knowledge and skills that Layer 2 volunteers possess can serve as a no-cost incentive for Layer 1 volunteers. Mentioned above as a method to increase Layer 1 volunteer retention, professional development training and career coaching can be powerful incentives for Layer 1 volunteers seeking to expand their employment opportunities. Volunteers can be partnered or grouped based on Layer 1 volunteer interests and Layer 2 specializations, and partners or groups can be provided with a structure for coaching training, and peer learning sessions that provide ongoing career guidance for Layer 1 volunteers.

Incentive Harmonization - Potential Solution

Partners and local government officials should meet with organizations within the local context to ensure that incentives are harmonized across education initiatives and align with other development partner and government guidelines. Ideally, there will be advocacy at the national level to standardize incentive types and amounts (particularly for financial incentives) amongst different NGOs and partners, according to what is possible to sustain by the government or local organizations. All organizations working in the area need to agree on a standard fee or incentive being provided by all partners and develop a policy around incentivization (in-kind or in-cash) to avoid creating conflicts of interest or decrease of volunteerism when the project ends. Ideally, educational volunteerism programs will work with Ministry partners to develop harmonized expectations for volunteer incentivization programs that reduce these perceptions of unfairness while still allowing for some individualization of incentives across programs to match volunteer profiles. For example, a Ministry could provide upper limits on the costs of financial or in-kind incentives to be provided to volunteers, and programs could choose different items to fit within those guidelines according to volunteer preferences.

Even non-financial incentives require collaboration and agreement between organizations and stakeholders, which may be difficult to negotiate. Every type of incentive has some kind of cost, and volunteer work is valuable. Successful project partnerships will identify cost-effective ways to motivate volunteers to continue the work after the initial funding ends, which requires partners to be creative and open-minded when designing incentivization structures. With their positive

engagement validated by project organizations and program impact, volunteers likely will have higher motivation and greater desire to dedicate even more time over a longer period of time.

Contextual Factors - Potential Solution

Volunteers are people and are motivated in different ways, making it difficult to provide appropriate incentives at scale that motivate everyone. However, the best approach may be to (1) use volunteer surveys and other tools when defining volunteer profiles to determine the types of incentives that are most likely to motivate the target volunteers for that context - where possible allowing for a limited number of different incentive options that could be matched to or chosen by different volunteers, (2) let volunteers know the entire package of incentives up front, and (3) provide opportunities for social recognition for current and past volunteers.

It's important to remember that the most effective incentives aren't always economic – program managers need to be flexible and creative when considering how to motivate volunteers and engage community members and potential volunteers in discussions to better understand what is valued by the local culture. In particular, for volunteers working with school-aged learners, it is often vital to have support from the local school system. When classroom teachers, Head Teachers, and other community leaders visit programs run by Level 1 volunteers to provide guidance, volunteers feel encouraged and take pride in their work. Layer 2 volunteers can actively engage local leaders and other stakeholders in activities that support follow-up, monitoring, or encouragement of volunteers in the program. This will help Layer 1 volunteers understand their impact on the system and how much their efforts are helping the children to learn.

Recognition by community leaders and local stakeholders will also raise the prestige of volunteerism, removing the stigma that volunteering is something unemployed people do. Community events that acknowledge and celebrate volunteers help the entire community realize the impact of volunteers' societal contributions. Social recognition has a huge impact on volunteers' motivation, and can easily be integrated into existing community events and gatherings.

Volunteers' motivations will also change over time. Layer 2 volunteers can engage Layer 1 volunteers in interviews and focus group discussion at regular intervals to check that the incentives available match the needs and desires of the Layer 1 volunteers, and also to let them know their needs are important and being prioritized by partners.

Conclusion

The Education Volunteerism CoP has collaborated and reflected on their own successes and failures to develop sustainable education volunteerism at scale and have proposed potential solutions to these ongoing challenges in this white paper. Overall, volunteerism initiatives are rarely sustainable

at scale, particularly when organizations work independently to develop their own model. One potential solution is to develop and implement a layered volunteerism model where local volunteers form the first layer of volunteers who work directly with learners. A second layer of volunteers drawn from existing sustainable volunteer (service) organizations can provide support in recruiting, training, monitoring, and incentivizing the first layer of volunteers. If needed, a third layer of volunteers can support the second. Ultimately, all partners should envision sustainability from the beginning, building in processes that become locally owned and feasible long after external funding has ended.

The next step in the development of sustainable education volunteerism initiative development is for organizations to pilot these proposed practices as part of their ongoing initiatives. Then, lessons from those experiences can be shared to continue the conversation around both the effectiveness of these approaches and ways the model can be adjusted to build sustainability. The Education Volunteerism CoP welcomes comments, feedback, case studies, and continued discussion around implementing the layered model and potential solutions proposed. Using information from places of implementation, and in collaboration with program implementers, the CoP will continue to develop practical tools for each section presented herein with the goal of producing additional white papers and a guide to sustainably scaling up education volunteerism initiatives.