



## Design, Test and Replicate:

how to develop a sustainable, local  
volunteer service countrywide

Executive summary

### **About the executive summary**

This executive summary provides a high level overview of the document: **Scaling up to become strong: Guidance for National Societies on how to develop a sustainable, local volunteer service countrywide.**

It is targeted at National Society leaders needing to have a broad overview of the process without requiring the level of detail included in the full document. It is complemented by a short powerpoint presentation outlining the approach used.

### **Disclaimer:**

This methodology has been developed and tested in multi-level member-based voluntary organisations.

While some of the approaches and techniques may be relevant to the systematic development of other forms of volunteer-based organisation, this has not been tested and the approaches may need to be adapted to these specific organisational types.

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# Introduction

*Developing a sustainable country-wide local-branch-and-volunteer service to vulnerable people is the first step for a National Society in making itself strong. That creates the platform from which the National Society can grow, step by step, in scope, importance, competence and strength.*<sup>1</sup>

This guidance describes how a National Society can systematically develop sustainable community volunteer units across a geographical area at low cost using an approach called **Design, Test, Replicate**. It addresses a major gap in advice and support for National Societies wishing to become strong according to the General Assembly's definition of strength:

**A strong National Society is one that is able to deliver country-wide, through a network of volunteer-based units, a relevant service to vulnerable people sustained for as long as needed**<sup>2</sup>.

The guidance takes an entrepreneurial, bottom-up approach to developing community-level services that mirrors how volunteer organisations grow organically over time. At the centre of the approach are the concepts of sustainability and scale: the approach focuses on developing activities that can be supported by local communities for as long as they are needed, and can be carried out sustainably in many geographical locations.

This guidance expands and replaces a paper drafted in 2002 by the then secretariat Organizational Development department<sup>3</sup>, and tested in Burundi and Ghana as part of the 2007 – 2010 Global OD Pilot Project.

The learning from these pilot projects can be accessed as follows:

Burundi: <http://www.ifrc.org/docs/Evaluations/Evaluations2011/Africa/978-92-9139-180-6%20Burundi-evaluation-report.pdf>

Ghana: [www.ifrc.org/docs/Evaluations/Evaluations%202012/Africa/GHODCasestudy12.pdf](http://www.ifrc.org/docs/Evaluations/Evaluations%202012/Africa/GHODCasestudy12.pdf)

This document provides a summary of the DTR process for National Society leaders. More detailed guidance for project managers can be accessed at: <https://fednet.ifrc.org/en/resources/ns-development/NS-development/buildingstrong-nationalsocieties/capacity-building-fund/ns-planning-guidance/>

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1 Building strong National Societies. Our common endeavour. A comprehensive framework

2 *ibid*

3 The DTD method. The quick, cheap and safe way of building nation-wide volunteer service delivery capacity.

# 1 Core principles and philosophy

There are a series of core organisational principles underpinning the DTR approach. While these may appear obvious, it is worth restating them here:

1. Even the poorest communities have the resources of time and leadership to sustain simple but effective local services
2. Such services can be developed and sustained systematically by National Societies
3. Effective community services attract further resources to all levels of a National Society, and provide the core of a National Society's structure and processes.

## 1.1 Replicability

In the approach, a structure or activity is replicable if it can be repeated in another geographical location. At the heart of the approach is the idea that it is possible to develop a simple model that, with minor local modifications, can be implemented in large numbers of locations.

## 1.2 Sustainability

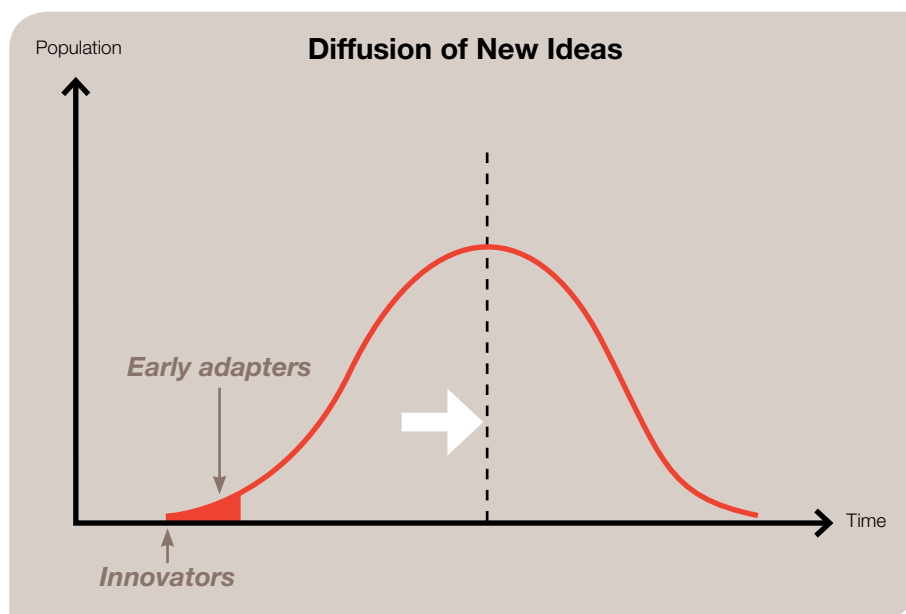
A key point of the approach is that individual community units should be sustainable, i.e. they should mobilise the resources that they need in order to deliver their services from within their communities. If further resources are available from the National Society or other sources, then these help the unit do more and better; however without further resources the unit should continue to carry out simple activities within its community.

If initial models of community units are not self-sustaining, then as the number of community units grows, it is likely to become impossible for a National Society to provide the same support to each individual unit. The project will therefore make some progress, but be unable to go to scale.

## 1.3 Focusing resources for success

This approach makes use of the innovation curve. This is a model for how new ideas and change spread through populations, and is particularly used in marketing products in the private sector.

The relevance of the curve to the DTR approach is that every population will contain communities which are likely to be more open to the development of community units, and communities in which this is less likely to succeed. This will also be repeated within the National Society: some intermediary branches will be very open to this type of project, while others will not, for whatever reason.



The guiding principle behind the DTR approach is that it should always be implemented in places where the chances for success are highest. The key to successful implementation is to focus on developing visible success in one place that attracts other communities and branches. This principle means that DTR should never be approached in a democratic or equitable manner across a country. Human and financial resources should always be focused where the conditions make success most likely – i.e. those areas where there are conditions likely or favour innovation. Once success has been developed it can then be taken to other geographical areas in a controlled manner.

## 1.4 Testing, learning and adaptation

All through the DTR process is a continuous cycle of small-scale testing, learning and adaptation. The approach requires constant, systematic iteration between the models that the National Society has developed, and how these models work in practice when carried out in communities. In particular in early phases of the process, it is quite possible that a model does not work as thought, or even fails entirely. What is important is that any failure or deviation from what is expected is documented, and the learning is applied so that the next time that the approach is tried, this takes into account the factors that did not work the previous time.

This learning will, over time ensure the greatest possible chances of success in the replication process. It will also reduce the costs of replication to a minimum.

## 1.5 Investment finance / maintenance finance

In developing a DTR plan, National Societies will need to distinguish between two types of financing:

**Investment finance** includes all the one-off costs that are required to create new community units and the system to support them. For example, this could

include employment of a project team, training, travel and accommodation to visit communities etc. This funding might need to last for several years at various levels, but will come to an end.

In budgeting for a DTR process, this is the type of funding that might be requested from an external partner

**Maintenance finance** is the cost of maintaining the system once the development phase is over and community units have been developed. For the system to be sustainable all community level units should be self-sustaining; however at higher organisational levels there will be some staff salaries and travel costs to be covered. Experience suggests that higher levels of organisation are less likely to have obvious sources of finance to hand, as well as being more likely to have high fixed costs. The National Society will need to develop long-term revenue streams in order to maintain this part of the system.

# Preparing for a DTR process



The following are key aspects of preparing for a DTR process.

## **Creating buy-in within the National Society**

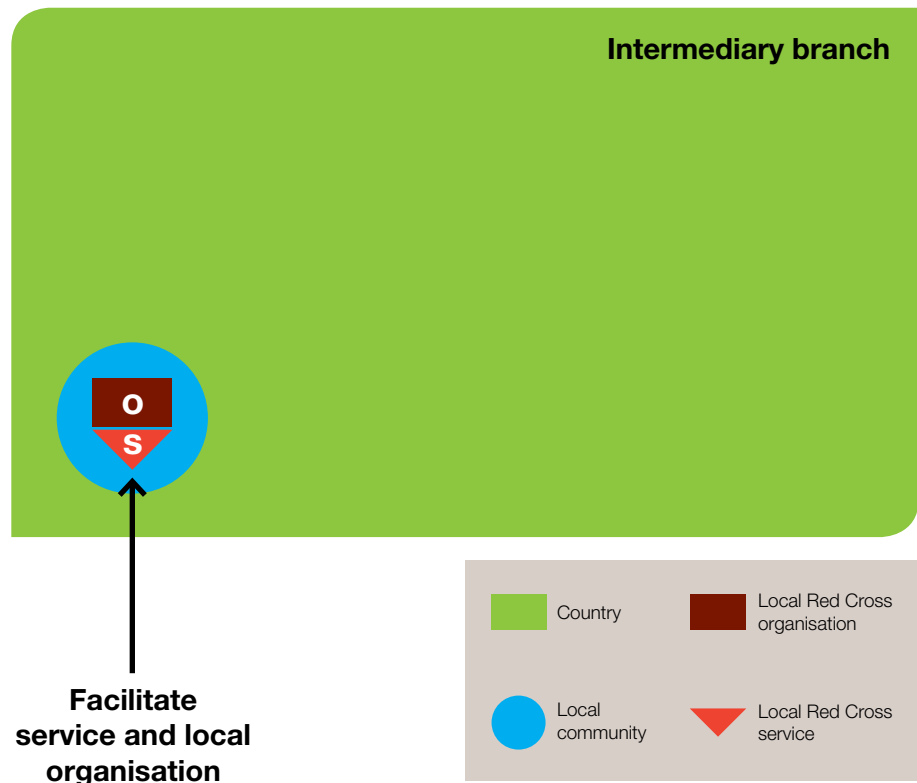
A successful DTR process will transform the community presence of a National Society. This will in turn require major change to systems, processes and roles within the National Society. Such change can only take place with the solid understanding and commitment of National Society leadership and governance, and it is therefore crucial that governance and management of the National Society have a common vision of the way forward, understand the process that will be undertaken, the risks and opportunities that this includes, and the roles that they will play in making the project successful.

## **Putting together a project team**

For the early stages of the DTR process, a small, focused team is required. It could be composed of two or three people, with representation from national level as well as the region in which the project will start. What is most important is that team members are well trained in the logic of the DTR approach. In particular, if it is possible to visit a National Society that has successfully gone through the process, then the team leader should take this opportunity. It is also very important for at least one team member to be able to have local credibility through local knowledge or connections: the team should not be visibly disconnected from the community.

## Key milestone 1: designing a model community unit

Summary: A National Society team creates and documents a sustainable local unit delivering a relevant and sustainable service within its local community.



### Activities

- NS team identifies a community in which the chances for successful development of a community unit are high
- NS team familiarises itself with location, community needs, community leaders, and identifies potential leaders and encourage community support for service development
- NS team facilitates with community/leaders the design of a local National Society service and organisational structure which:
  - ➔ meets relevant local needs
  - ➔ can and will be led by local people with small amounts of training and support
  - ➔ can and will be resourced by the local community
- NS team to ensure that existing National Society regional structure meets needs of new unit.



## Documentation and learning

NS team documents all impressions, activities, meetings, “critical factors”, failures, needs and knowledge as they occur. Particular areas of interest:

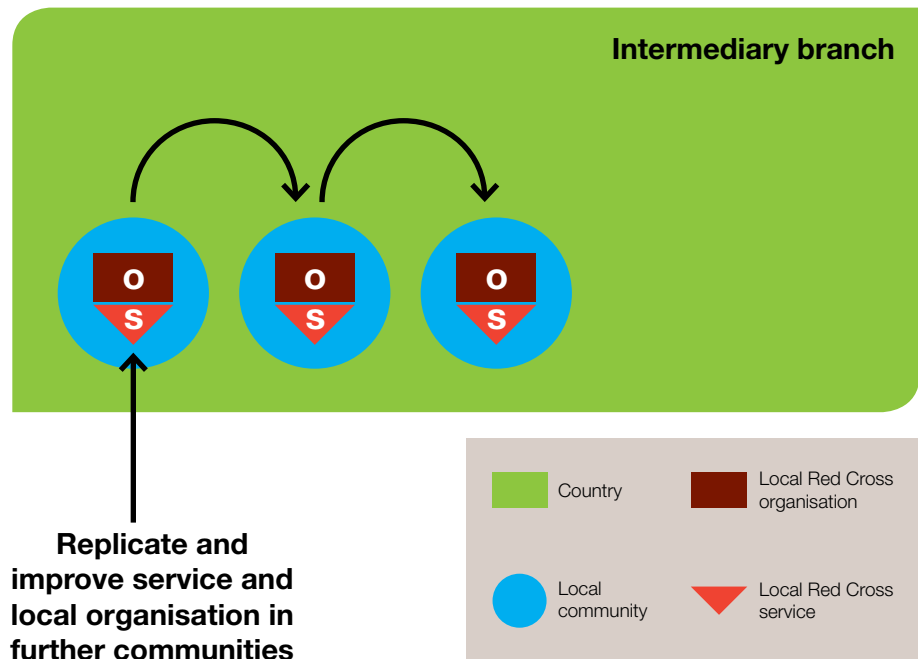
- documentation of methodology for development of local service
- summary of key aspects of
  - ➔ service structure
  - ➔ how human and financial resources are mobilised, and
  - ➔ organizational structure in community

It is possible that the design team encounters a situation in which successful development of a local unit proves impossible. If this is the case, then understanding the exact factors for this failure is crucial to identifying a community that is better suited to this type of intervention.

More likely is that one or more of the assumptions that the National Society has made prior to contact with the community have had to be modified as discussions take place, and as the first unit takes shape and starts to function. Again, the team should learn from this process so that the experience can be incorporated into subsequent phases.

## Key milestone 2 – testing and refining this model

Summary: A National Society team takes the model and learning from developing the initial unit, and applies it in 5-10 further local communities near to the first one. At the end of this process, an approach has been refined for how to develop a local community unit, including any factors which are known to facilitate or limit this process.



### Activities

- NS team identifies further communities with likelihood of success based on learning from first community in same geographical area
- NS team follows similar process as in first community to facilitate new local units in these locations

### Documentation and learning

NS team documents all impressions, activities, meetings, “critical factors”, failures, needs and knowledge as they occur. Particular areas of interest:

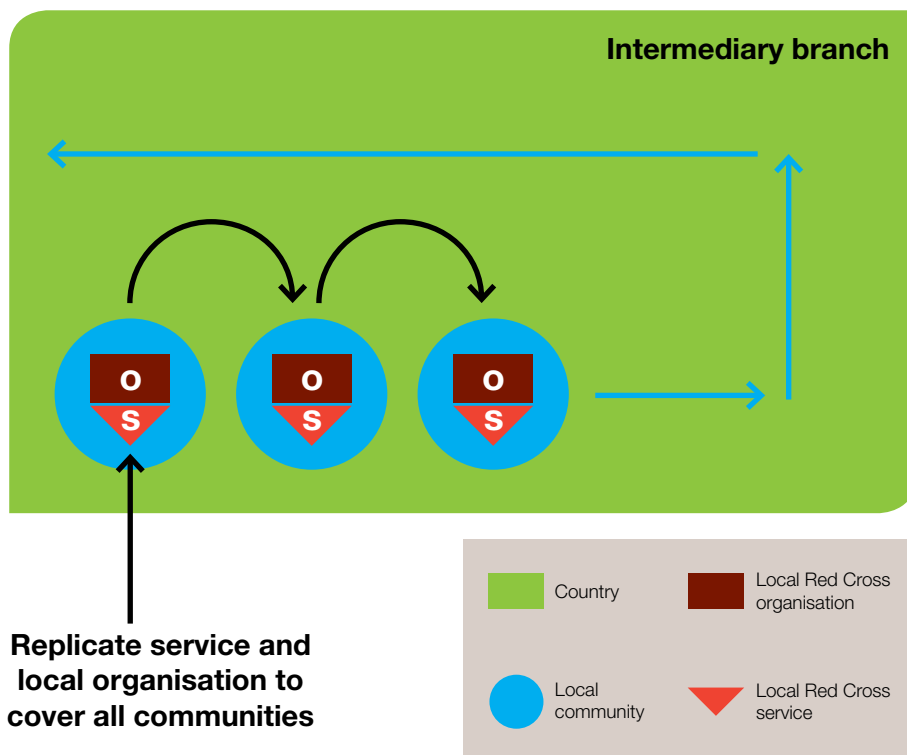
- Similarities of process between first (and other) units
- Differences of experience between communities: what factors within communities seem to affect the formation of local units

As in the previous phase, if it proves impossible to develop a unit in one location, special attention will be paid to understanding why this has not been possible, and this will be incorporated into decision making when it comes to identifying future communities as well as the model for setting up new units.

The learning and analysis at this stage is geared towards developing standard models and processes that can be taken to scale across hundreds of communities as efficiently and effectively as possible. These should give an estimated average cost for setting up a new unit.

## Key milestone 3 – taking the model to scale

Summary: A number of teams take the model developed and replicate it across a geographic area. At the end of the process 80% or more of the area is covered by sustainable local Red Cross Red Crescent units delivering a relevant service.



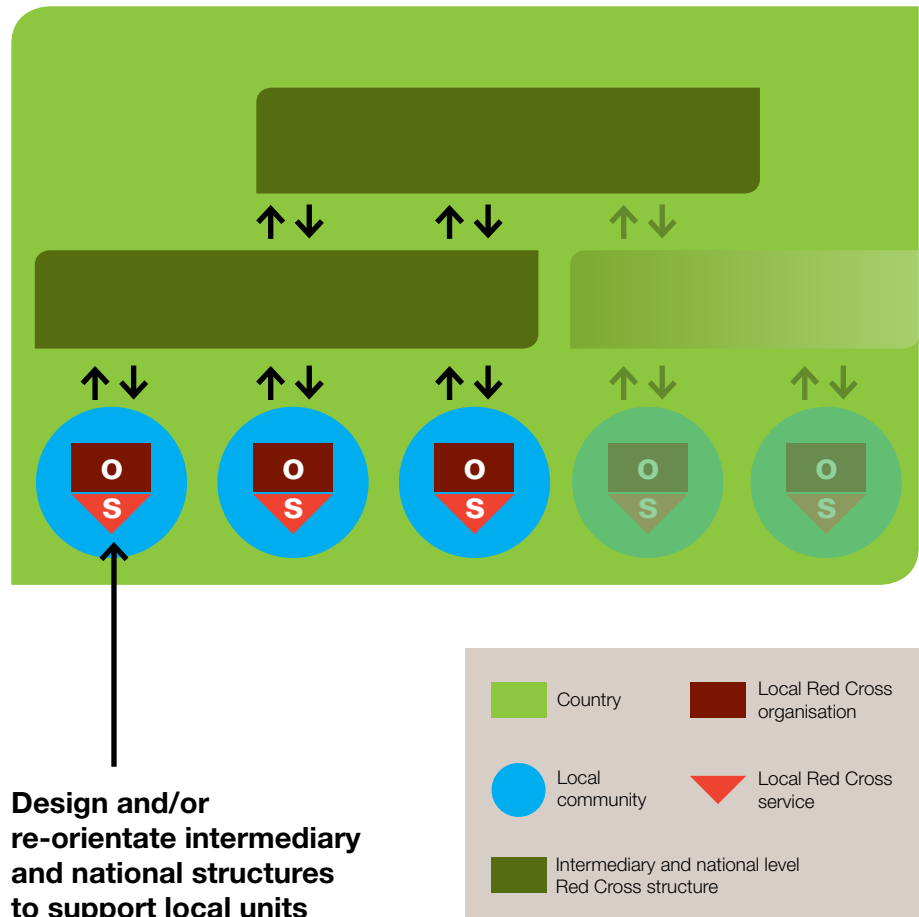
### Activities

- The NS team trains further teams using the knowledge gained from setting up the initial unit and subsequent replication
  - ➔ The form and dynamics of a local unit
  - ➔ The process for setting up new local units
- Teams continue to facilitate local units within a geographical area
- A quality assurance process is put in place (possibly the initial team) to ensure that work is carried out of a high standard.

**Note:** the project logic will shift from working with communities where success is very likely, to working with all communities. In this case, the failure rate may well go up. One role for the project team is to monitor failure, and identify areas where different models / approaches may be needed.

## Key milestone 4 – developing support structure

Summary: By the end of this phase, local units are receiving ongoing support from a coherent structure which provides two-way linkage with the national office.



Although this process is described as taking place after widespread replication of the local unit, in all likelihood this process will need to start to take place as soon as there are a number of units set up in one locality.

Obviously, the support structure could involve branches at several different organisational levels, and eventually the national organisation as well.

Activities:

- NS team assesses existing branch structure
- NS team assesses support needs for local units
- NS team sets up new structures and / or adapts existing structures to meet support needs of new local units. In doing so it follows the same logic used in setting up local units: it tests a new model, learns from the experience and then applies the model in further locations.

## **Key milestone 5 – expansion to other regions and ongoing realignment of the National Society**

Summary: The process of developing community units and support structure continues in other branches, requiring ongoing realignment of National Society systems and processes.

The National Society continues to expand its community base and support structure, and the national office realigns its functions to focus on supporting community-level services. In all likelihood, a whole series of management changes take place as the National Society adjusts to its new capacities and the challenges of making the new organisational model work.

At some point the project team in consultation with national leadership will feel that the process will now run automatically in the initial intermediary branch, and that it is time for the process to be repeated in one or more further branches. As with the initial process, this will involve the project team in further training and ongoing quality assurance, either in one branch or several, depending on the financial resources available and the strategy agreed within the National Society.

Internal systems and processes at all levels will again need to adapt to meet these challenges, and it may take a number of years before these changes work their way through the system and a stable model evolves. The role of senior governance and management during this process will be to keep focus on the importance of the community base as the basis for the entire organisation, and continue to align culture and process with the needs of this base.



# The Fundamental Principles of the International Red Cross and Red Crescent Movement

**Humanity** The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

**Impartiality** It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

**Neutrality** In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

**Independence** The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

**Voluntary service** It is a voluntary relief movement not prompted in any manner by desire for gain.

**Unity** There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

**Universality** The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

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