

# **LINKS**

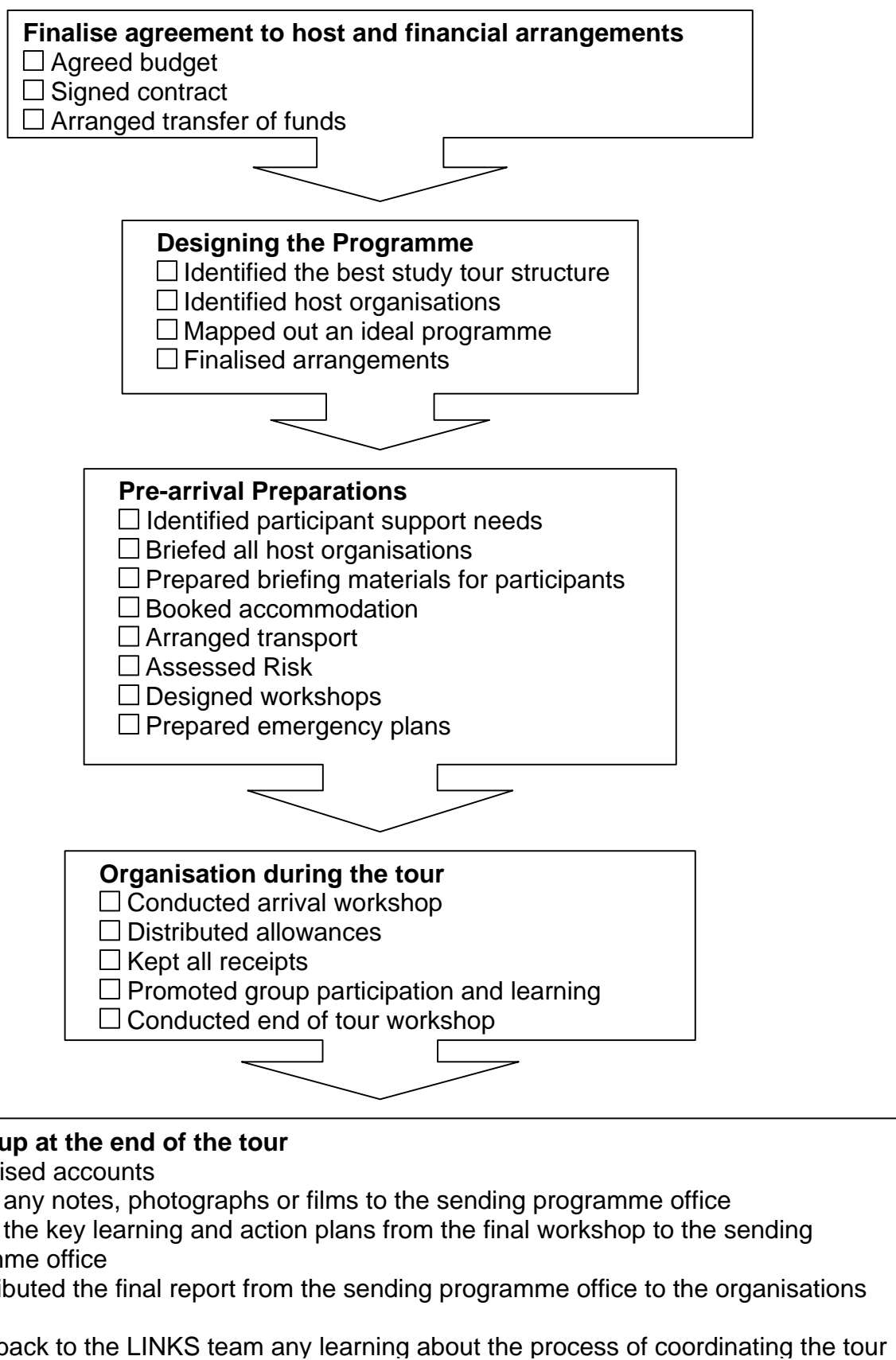
## **Study Tours**

**A Guide for Tour Coordinators**



## Process Checklist

This flowchart lists the activities you need to do to organise a study tour. You can use the boxes as a checklist to keep track of what you have already done



## **Coordinating the Tour**

The coordinator is the main person in charge of the LINKS tour in the host country. In addition to taking the lead on designing the tour programme you are also in charge of making sure that everything runs smoothly and that communications are clear. You will be the main point of contact for the sending programme office, the LINKS team and the hosting organisations. It may be that this role is split between the VSO programme office and another organisation. In which case, the key to success is being clear about which of the parts of the coordinator role each stakeholder is taking on.

As coordinator of the tour, your roles and responsibilities include:

- Identifying appropriate host organisations to visit and arrange appointments
- Act as the key point of contact for these organisations
- Brief host organisations to develop participatory sessions
- Collect information materials from host organisations in advance to allow time for translation (where relevant)
- Provide interpretation from local languages into English (where relevant)
- Organise an on-arrival orientation workshop and a final learning workshop on the basis of input from VSO. This involves providing materials and accommodation for workshops and facilitating sessions
- Accompany the tour participants during all activities and be available 24 hours as an emergency contact during the period of the tour, including weekends if applicable.
- Respond to participants medical and other emergency needs.
- Ensure the smooth running of the tour, including organising internal transport, accommodation and food for the delegation during the tour.

Past experience has shown pre-arrival organisation takes about a week of work spread over a couple of months. This will be longer if you need to travel greater distances to visit host organisations.

This guide gives you good practice for running a study tour, which are broken down into five key elements of a tour coordinators' job:

1. Finalise agreement to host and financial arrangements
2. Designing the Programme
3. Pre-arrival Preparations
4. Organisation during the tour
5. Follow up at the end of the tour

# 1. Finalise agreement to host & financial arrangements

## 1.1 Agree budget

The VSO Programme Office that is sending the participants (the sending programme office) will send you a contract with a budget for all the costs of running the tour. The costs are based on previous tours, but if you feel that they are inappropriate for your country then amend the budget and check it with the sending programme office.

In preparing the final budget in the contract, VSO suggests that allowances are paid as follows:

Allowance	Details	Amount
<b>On-arrival allowance</b>	An allowance to cover out of pocket expenses such as calling home or buying soft drinks for the duration of the tour.	➤ £60 per participant from a different continent ➤ £30 per participant from the same continent
<b>Daily food allowance</b>	Where meals are not provided, a daily allowance is given to cover the buying of food	➤ £10* per day if no food is provided ➤ £5* per day if lunch is provided during visits

- These figures may vary depending on food costs in the host country.

VSO recommends where possible that participants are provided with breakfast and lunch, and an allowance for evening meals.

VSO also requests accommodation which is simple and reasonably priced, but clean and safe and appropriate for partner's needs. If you are considering accommodating participants in shared rooms then please check with the sending programme office that this is appropriate.

## 1.2 Sign Contract

When both yourself and the sending programme office are happy with the budget then sign the contract, return it to the sending programme office to sign. Where possible scan the signed contract and send by e-mail, or fax the contract. The sending programme office will then sign it too, and return a complete copy to you.

## 1.3 Arrange transfer of funds

The programme office in your country (the hosting programme office) will then transfer 90% of the budget to you. The remaining 10% is a contingency and will be transferred at the end of the tour to cover any costs over the original 90%.

To arrange the transfer you will need to send the hosting programme office your bank details. This should include the following:

- Sort code or the bank's SWIFT code
- Account number
- The name and address which appears on your bank account
- The name and address of your bank

## **2. Designing the Programme**

Designing a study tour programme that takes the participants' learning beyond *what* an organisation does to *how* they do it can be very challenging. The steps below are meant to help you identify the key steps involved in designing a successful study tour

### **2.1 Identify the best study tour structure**

It may be that the sending programme office and LINKS team already have a clear idea of the best structure for the study tour, in which case, this will provide a guide for you.

Working within a maximum time frame of about 2 weeks there are two key things to consider when deciding on your tour structure:

- The number of organisations to visit
- The time spent with each organisation

For example, if a visit is about understanding better a narrow aspect of a particular practice, more time with a few organisations is likely to be more effective. However, if a tour is intended to expose participants to a wide array of practice in order to identify what will work for them in their own context, a series of visits to different organisations may be most appropriate.

As a general rule, it is better to spend more time with fewer organisations to allow informal interactions and discussions between participants and hosts to take place. A rule of thumb is to have a maximum of one or two organisations per day, although this will depend on the availability of host organisations and may not always be realistic or appropriate.

### **2.2 Identify host organisations**

Once you have identified the study tour structure, use the participants' learning objectives forms and the LINKS proposal form as your main guidelines when selecting the host organisation(s). The sending programme office will have supplied these forms to you.

The LINKS team, sending programme office, and more particularly, the programme office in your country may have a number of contacts for potential host organisations. Liase with them when putting together the list of potential host organisations.

When selecting potential host organisations, please bear in mind that to give participants a complete understanding of a field it might be useful to include visits to a variety of organisations; from small community based groups to government departments, and from service providers to organisations focusing on advocacy and policy formation.

### **2.3 Map out an ideal programme**

Once you have identified the organisation(s) that will meet the objectives of the visiting group, it is helpful to first put together an 'ideal' programme. This

will allow you to group visits, either by geographical location, or focus area. When you contact possible host organisations it may be that they are unavailable on the 'ideal' day, so be prepared to be flexible.

See the sample timetable in the resource pack based on a 2 week long study tour, which shows the key elements that should be included in any programme of visits. In addition, when mapping out the programme it is useful to consider the following:

- **Vary learning methods:** Because people learn in different ways it is important to use a combination of different learning methodologies including lectures, presentations, Q&A, work practice and direct observation. As much as possible try to find opportunities for the tour to visit work happening on the ground rather than only having discussions in head offices. This will help participants get a real feel for how the organisation works.
- **Vary the time slots:** The amount of time the group spends with different organisations doesn't have to be uniform. For instance, visiting an organisation with lots of community-based projects is bound to take longer than a presentation at an office based organisation.
- **Allow time for sharing:** Make sure you allow enough time for participants to informally "trade ideas" with each other and with hosts. Also allow time for an end of visit sharing session, where participants and hosts have a chance to ask each other questions and share impressions and learning from that particular visit.
- **Factor in travel time:** Remember that travelling takes time and clearly state departure times on the programme.
- **Factor in time for interpretation:** If the group needs interpretation then everything will take twice as long to say, so allow time for that in the schedule, and make sure the organisations you are visiting know that.
- **Include lunch:** Whenever possible you should try to incorporate lunch into the visits to give participants the opportunity to interact informally with the hosts.

## 2.4 Finalise arrangements

Once you have developed your 'ideal' timetable, you now need to contact the potential host organisation(s) to finalise the actual timetable. Some hosts may not have heard of VSO before. When you contact them explain about VSO's work and vision in both the hosting and sending country, your role, and what you hope the visit will provide.

Try to be flexible and to adapt the timetable around the best times for seeing their activities in action.

See the next section on pre-arrival preparations for details on the areas that you need to brief hosts on, once they have agreed to host a visit.

### 3. Pre-arrival Preparations

Once the programme has been finalised, there are still a number of things that you need to do.

#### 3.1 Identify participant support needs

The emergency forms sent to you by the sending programme office will contain details of any special requirements including dietary needs and access needs. Make sure you consider these when arranging visits, accommodation and transport.

If participants and hosts don't speak the same language make sure enough translators are employed or are accompanying the participants (a minimum of 1 translator per 4 participants). Experience shows that it is too much work for coordinators to also act as translators, and participants risk losing out on their own learning if they have to translate for their peers. Other ways to improve communication despite language barriers include using visual aids and giving enough time to show the practice of an organisation in action rather than just talk about it.

#### 3.2 Brief all host organisations

The tour coordinator is responsible for preparing the host organisations to make each visit as beneficial as possible for the participants and the hosts. It is useful to meet, or as a minimum have a telephone conversation with each of the hosts prior to the visits. Below is a checklist for the key issues to discuss with all hosts:

- **Participants' expectations:** The coordinator should discuss the participants' learning objectives to help hosts organise the visit and identify whom best to meet in the organisation. Where possible, request that a number of people are available at host organisations to answer questions.
- **Share the participant profile:** With the help of the sending programme office, compile and distribute a written overview of the participants and their organisations. Ask the host to consider the participant's current level of understanding, so that the visit doesn't simply go over areas they already understand or have knowledge of.
- **Share any support needs:** Brief the host about any special needs, including any accessibility issues that need to be considered.
- **Discuss interpretation:** If you will be working with interpreters on the tour, discuss this with the hosts. It is likely that the organisations you are visiting may not have worked with interpreters before, so it is useful to give them some guidance beforehand. Remind the host organisations to use simple language, and speak in short sentences, and pause to allow the interpreter(s) time to translate for the group.

- **Request resources:** Check with hosts prior to the visit about any printed materials or other resources they can offer participants, and clarify any costs that participants will incur for such materials.
- **Encourage learning from mistakes:** Help the hosts understand that the participants are coming to learn, not inspect their organisation. It is important that they feel comfortable to share problems, challenges and mistakes as well as good practice.
- **Identify a key liaison person:** Make sure an identified person from each host organisation is prepared to greet the group and give them the context and history of the organisation's work.
- **Share the programme:** Give each host a copy of the complete tour programme so they see their particular role within the larger context of the tour.

### 3.3 Prepare briefing materials for participants

The coordinator should prepare a welcome pack for all participants that includes:

- Notebooks and document holders to help them organise their tour notes
- A copy of the tour programme
- Maps (where relevant)
- Profiles and contact details of the host organisations
- The coordinators contact details
- Extracts from VSO's country strategy in the relevant area, when applicable
- A country briefing pack which includes information about local culture and customs, practical details like how to phone home and where to access the internet, and information about the climate. The LINKS team can supply you with a copy of the briefing information given to volunteers
- A copy of the daily diary (in the resource pack). Print out the front page and print out enough of the second page so that they have half a page for each day. If the tour is 6 days long the diary will be 4 pages long – the front page, and then three diary pages.

In addition to preparing the welcome packs for the groups arrival, you should email the VSO sending programme office a copy of the tour programme, profiles of hosting organisations, your contact details and the country briefing information for their use in the pre-departure workshop to brief participants.

### 3.4 Book accommodation

Find cheap, decent and practical accommodation for the participants. Unless they stay in local host families all the participants should be lodged in the same place. Often it is practical for you to stay with the participants. Some participants may be happy to share rooms, but some will find this inappropriate. Check with the sending programme office if participants will be happy to share rooms - if appropriate this will be more cost effective.

### 3.5 Arrange transport

Find a travel operator that you trust and that can give you a good deal on all

transport arrangements throughout the tour.

### **3.6 Assess Risk**

Use the Risk Assessment Checklist in the resources pack, designed to help you think through any risks associated with activities within the study tour. Consider if any thing can be put in place to reduce risk. If there are any activities not highlighted on the checklist, then use the Risk Assessment form to think through potential risk factors. Please then send the Risk Assessment form to the Sending Programme Office staff member, and LINKS team member that you have been communicating with.

### **3.7 Design workshops**

There are two key workshops that you need to prepare. These are:

- **The on-arrival workshop:**  
Devote the first half-day of the tour to brief the participants about the local context, the tour programme and any logistical issues including allowing time out for participants to change money. You should discuss the daily diary and reflections sessions. (See the 'Organisation during the tour' section below.) Give participants their allowances - refer to section 1 (Finalise agreement and financial arrangements) for information on this.
- **The final workshop:**  
Hold an end-of-tour workshop for participants as well as other relevant representatives from host organisations, government or the NGO sector, who can act as resource people. As well as being an opportunity to reflect on learning, identify challenges and develop action plans, the workshop should also prepare participants for what it means to be advocates for change in their own organisations and communities. Print out and give the participants the certificates in the resource pack.

There are suggested workshop activities for both workshops in the resource pack. In addition to designing the sessions, don't forget to arrange for a place to conduct the workshops.

### **3.8 Prepare for any emergency**

The VSO programme office in your country will identify a liaison person from their staff team for the duration of the tour, who can be contacted by you in the event of an emergency. They will also provide you with the details of the VSO in-country doctor.

You will also have been sent emergency forms for all the participants, which will give you details of who to contact in the event of an emergency.

Please also provide the sending VSO programme office with a contact number, preferably a mobile, where you can be reached during the tour.

You should also send the tour programme, and your contact details, to the VSO office in your own country, so they can trace you in the case of an emergency.

## 4. Organisation during the tour

Once the tour starts there are a few things to keep in mind:

### 4.1 Keep track of the budget

During the tour, it is your responsibility to manage the finances. This includes:

- Carrying enough cash to pay for expenses during the tour
- Gathering receipts for all payments made
- Preparing and distributing the participant allowances. Participants should sign a form when they collect the allowance but do not need to provide receipts for how they spend the allowances

### 4.2 Promote Group Participation and Learning

**Communicate:** Have access to a mobile phone or contact number for out of hours calls during the tour.

**Introduce and thank:** It is useful to have a rotating group leader amongst the participants to introduce the visiting group and give a vote of thanks at the end of every visit.

**Arrange for someone to take notes** and prepare a synthesis of key presentations and discussions. It is good to have rotating system involving the participants in this. Ideally these notes should be distributed to the participants before they leave the country.

**Capture learning** by using either a video camera or taking photographs

**Gather materials:** You should gather copies of all materials, presentations and handouts from the visits and ensure duplication or distribution as needed.

**Encourage daily evaluation:** To allow participants to review and synthesise daily learning into action points you should encourage the use of the learning diaries for self-reflection as well as facilitate daily evaluation sessions. The diaries are a space for the participants to individually think about what they have seen during the day, to think about how they can use that learning, and whether it could usefully be applied in their own organisations. They can also identify areas they would still like to know more about, and think whether there are any questions they could ask during the visits on the following days. The reflection sessions at the end of the day should allow participants to think about these questions together. You could simply go round the group and ask each participant to say one thing that they saw during the day which they thought was good practice, and whether they thought it would be possible to adopt it in their own organisation. The accompanying VSO staff member can also facilitate these sessions.

**Manage group dynamics:** Participants will come from a range of different organisations and sectors (for example, a group may contain government officials and grass roots community workers). Factors like gender, age and status of and within their organisation will all affect how participants interact.

As tour coordinator you need to use strategies to help all of the tour group to participate and voice their opinions. For example, if there are divisions in the group along gender or status divide, or some members are less confident to speak out, you could ask the group to work in pairs to write a list of questions to put to an organisation, rather than simply asking “any questions” as only more confident group members may speak up.

**Support the group:** You may be asked to help resolve group conflict during the tour. Ask the VSO staff for support if this is required.

**Facilitate links:** Make it clear to the hosts and participants that ongoing links and relationships between organisations are encouraged and that the LINKS team can play a role in supporting them.

### **4.3 Emergency action**

Make sure you always have a well-stocked medical kit and contact details for the VSO in-country doctor and the participants’ emergency contacts handy throughout the tour. Should a member of the team require medical treatment it is your responsibility to make sure they can access it. In the event of a serious emergency, you should liaise with your local VSO programme office for support and guidance.

## **5. Follow up at the end of the tour**

### **5.1 Finalise accounts**

Once the tour is over, you need to finalise the tour accounts. You will need to prepare a final summary of costs incurred, gather all the receipts and send this information to the sending programme office. They will then be able to pay any outstanding balance to you or ask you to arrange for the return of money left unspent.

### **5.2 Send notes, photographs or films to the sending programme office**

The tour coordinator does not need to write a tour report as this is the responsibility of the participants. However, the tour coordinator plays an important role in capturing learning during the tour through organising note taking and filming or taking photographs. Please send any images on to the sending programme office at the end of the tour.

### **5.3 Help complete Tour Report and share with host organisations**

In addition, send a write up of key learning and action plans developed during the final workshop to the sending programme office. This will help the sending programme office prepare the tour report. When you receive the final report, please share it with the host organisations to share the positive experiences participants have had at their organisations.

### **5.4 Feed back to the LINKS team**

The VSO LINKS team will contact you to discuss your experiences of coordinating a tour. This is just for the team to get feedback on this guide, and our support, and to see if you have any thoughts or advice on the process in general. Please be as frank as you feel comfortable being, so that we can learn from you.