

LINKS

Study Tours

A Guide for the Sending Programme Office



Process Checklist

NB - Throughout the guide items with * by them are in the resource pack

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.

Minimum timeline – if you don't hit any problems!

Begin at least 2 months before tour departure

1. Develop the idea

- Clear, SMART objectives
- Budget approved and matches planned activities

Begin at least 1 1/2 months before tour

2. Identify participants

- Participants selected
- Participants completed Learning Objectives form * and Emergency and Support Needs form *
- Where participants' passports are not valid, new passports applied for

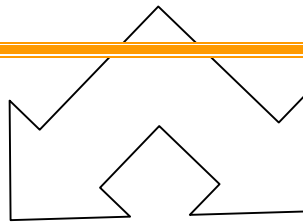
3. Finalise the Host Country

- Ask LINKS team to research possible host country if you haven't already identified one
- Contact potential host PO and discuss capacity to coordinate (send Host PO guide)

Begin at least 5 weeks before tour departure

4. Identify a Tour Coordinator
There are four possible outcomes:

1. VSO Host PO coordinates
2. VSO Host PO identifies another organisation to coordinate the tour
 - Ask LINKS to check organisation on terrorism list
 - Check agreement and availability of tour coordinator
3. LINKS team identifies an organisation to coordinate the tour
 - Contact LINKS for support with identifying a tour coordinator
 - Agree coordinator with host PO, and agree who will contact the identified coordinator.
 - Ask LINKS to check organisation on terrorism list
 - Check agreement and availability of tour coordinator
4. Not suitable host country



These two sets of activities need to happen at the same time

5 (a) Develop the tour schedule

Brief the coordinator *and explain the contract*. Send:

- Study tour proposal
- Participants Learning Objectives form*
- Participants Emergency and Support Needs form*
- Tour Coordinator's guide
- *Draft contract**

Finalise dates

Negotiate contract & in country budget (ongoing while schedule finalised)

Give Tour Coordinator feedback on draft itinerary

Check accommodation, food and travel arrangements suitable

Finalise and sign contract

Transfer budget

5 (b) Pre departure preparations

Visas

Flights (once visas are secured)

Give emergency contact details for the Host PO to accompanying PO staff and the Tour Coordinator

Send final participants list and itinerary to LINKS and Host PO

Arrange insurance – email Mike Goodwin:

- Participant list
- Tour dates and location

Ensure participants have read briefings and completed forms:

- Security briefing
- Medical briefing *
- Insurance form*
- Commitment form *

Deliver pre-departure workshop

Arrange transport to airport

**Begin at least 3 weeks
before tour departure**

6. Accompany the tour

Actively facilitate learning of participants

Lead daily reflections sessions

1-2 weeks

7. Post-tour

Support participants to implement action plans

Request tour receipts and settle balance

Produce tour report

Reflect outcomes in programme area review

**On return
and ongoing**

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1. [Develop the idea](#)
2. [Identify participants](#)
3. [Finalise Host country](#)
4. [Identify a tour coordinator](#)
- 5 (a) [Develop the tour schedule](#)
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If, once you have read this guide, you have any further questions then please contact the LINKS team.

1. Develop the idea

Make sure the objectives are clear, SMART (specific, measurable, achievable, realistic and time bound), and linked to the CSP. The clearer your objectives the more effective the tour will be.

Within the approved budget, think about how to make the tour more effective by considering the balance between the number of participants and the number of days. Also consider whether it is better to have more organisations with fewer participants each or a smaller number of organisations with more participants. Having a minimum of two participants from the same organisation makes it easier for them to support each other to make changes after the tour.¹

Depending on your participants, and on the location of your tour, you may need interpreters. Assess the language skills of your partners to determine if interpreters are needed. You will need at least one interpreter per 3 participants. However, it is always good to have at least 2 interpreters, as it is very tiring for one person to interpret all the time. The participants from your partners should not interpret, as it will have a negative impact on their learning. **Make sure you have allowed for this in your budget.**

2. Identify participants

¹ While the number of participants depends on the tour, budget, etc., study tours should generally have about 8-12 participants.

Participant selection

With your partners think about who should come on the tour. You could consider some of the following:

- Who is best placed to implement the learning. This may be a manager to make changes to policy, or it may be an implementer to think about the day-to-day issues, and make changes on the ground. It may be a combination of different roles.
- Who will be fully committed to the tour and to learning new things.
- How to make sure the tour is inclusive. For example, think about how to remove barriers to women participating in the tour – such as childcare issues, family commitments and school holidays. Try to ensure that selection and other factors, such as the timing of tour, aren't excluding female participation.
- Whether there are opportunities to involve marginalised groups.
- **NB** LINKS activities are for partners, not volunteers, although in some exceptional circumstances volunteers may attend.

Selection criteria for Nigeria Study Tour:

Overall:

- At least two women must participate
- Representation of PLWHA
- Representation of ALL the 4 regions VSO works in

Organisations:

- At least 3 years direct involvement focused on HIV&AIDS
- Target groups must include youth and/or leaders
- Has potential of working with and/or hosting volunteers
- Clear and practical agenda on mainstreaming and networking.

Participants:

- At least 2 years direct HIV&AIDS work experience focusing on prevention and education
- At least 60% practical involvement in facilitation, mobilization, networking and mainstreaming HIV&AIDS
- Greater involvement with People/ Groups Living with HIV&AIDS

Learning Objectives form* and Emergency and Support Needs form*

Get all participants to complete these forms. This will provide key information about their learning objectives, emergency contacts and support needs. You will need these to help identify the best host country, and the tour coordinator² will need them to design a schedule that meets the participants learning objectives and support needs. You will need to complete the final section of the Emergency and Support Needs form with your PO emergency contact information. A copy of these forms can be found in the Resources Pack. The forms will tell you whether participants have valid passports. If participants do not have a valid passport (with 6 months remaining) begin the process of getting a passport as early as possible.

3. Finalise the Host Country

² The Tour Coordinator might not be someone from the host PO.

Research good practice

Once you are clear on the objectives of the tour LINKS can support you to research which countries have good practice that tour participants can learn from to achieve these objectives.

The best location for the tour will be a combination of different factors including:

- Good practice, ideally within VSO's partners (but study tours can visit countries where VSO does not work, and organisations we do not work with).
- How similar the context is to your own, so that any lessons learnt will be relevant.
- Cost-effectiveness.

Contact potential host PO

Once suitable host countries have been identified, find out how involved the host PO can be in the tour by sending the LINKS guide for hosting POs to the Country Director and asking them to choose from the following four options. Here is a sample e-mail which you may like to use:

Dear [HOST PO CD NAME],

I am writing about a study tour we are arranging for our partners. The focus of the tour is [TOPIC OF TOUR]. I've attached the study tour proposal for more information.

[COUNTRY X] was identified as a country where there is good practice, and where we could meet the objectives of the tour. I was wondering whether you agree that there is good practice in this area, and what your PO's capacity is to support this tour. We are hoping to have this tour in [SPECIFIC DATE OR MONTH YOU ARE AIMING FOR]. Would you be able to take a look at the 4 options below and let us know whether you support the tour and what role you can take? There is more information about each of the options in the attached LINKS Host PO guide:

- 1. You support the tour and can take the lead in coordinating it**
- 2. You support the tour but can't take the lead, but you can identify a partner that can take on this role.**
- 3. You support the tour but can't take the lead and don't know of a suitable partner, but if we are able to find an organisation to take on the work, you're happy for the tour to go ahead.**
- 4. You don't support the tour as you feel this isn't an appropriate opportunity.**

If possible, could you get back to me by [DAY YOU NEED RESPONSE BY] please?

Thanks very much,
[YOUR NAME]

4. - Identify Tour Coordinator

Depending on which of the options the hosting PO has chosen go to the relevant section.:

1. VSO PO coordinates

No need to identify a tour coordinator as the host PO is taking on the role. You just need to:

- Check the availability of the hosting PO for your preferred dates.
- Identify your key contact in the host programme office.

2. VSO host PO identifies coordinating organisation

No need to identify a tour coordinator as the host PO has a partner in mind. You just need to:

- Ask LINKS to check the identified organisation against the financial sanctions list. This is very important to protect VSO against criminal practices.
- Agree with the host PO who will approach the identified organisation to confirm their agreement and check their availability for your preferred dates.
- Once they have agreed to coordinate, identify your key contact in the coordinating organisation and liaise directly with the coordinating organisation.
- Be very clear about the roles and responsibilities of the coordinator and make sure coordinator and his/her manager know about time required for the role. Make sure everyone involved in coordinating the tour has copies of the Tour Coordinator Guides.
- Make sure host PO and tour coordinator understand their roles and responsibilities.

3. Host PO is unable to identify coordinating organisation, but feels that their country is a suitable location

- If the host PO is unable to coordinate the tour then LINKS can support you to identify a suitable coordinator (*see criteria below*). Your research so far may have already identified some possible coordinating organisations.
- Once a coordinator has been identified, and checked against the financial sanctions list, agree with the host country PO whether it is more appropriate for them or for you to approach the identified organisation to confirm their agreement and check their availability for your preferred dates.
- Once they have agreed to coordinate, identify your key contact in the coordinating organisation and liaise directly with the coordinating organisation.
- Be very clear about the roles and responsibilities of the coordinator and make sure coordinator and his/her manager knows about time required for the role. Make sure everyone involved in coordinating the tour has copies of the Tour Coordinator Guides.

4. Not suitable host country

- If the host PO feels good practice is limited, or there is a security risk or a risk to their programme, a new host country will need to be identified.
- If you disagree with the host PO then contact the LINKS team who will follow the appeal mechanism.

NB For options 1,2 or 3, it may be possible for extra capacity to be provided to a coordinating partner organisation or PO in the form of a volunteer or local consultant.

Select the coordinating organisation: The role of the tour coordinator is key in ensuring the success of a LINKS activity. It is important that tour coordinating organisations have the following features:

1. Display openness and willingness to work with VSO on the study tour
2. Have the organisational capacity to manage, plan, and implement the study tour (independent consultants would not have this, and would not be suitable unless they were working within a suitable organisation).
3. Have programmes and projects that will provide the opportunity for learning on the chosen theme of the tour OR indirectly, must have established relationships and partnerships with networks and organisations that run these programmes and projects
4. See the value of the study tour as a learning opportunity for themselves and an opportunity to validate the work they are doing with their partners
5. Provide any relevant resources and access to available information
6. Provide staff time and support for the tour implementation
7. Co-facilitate the learning workshop and tour evaluation

5 (a). Develop the tour schedule

Brief the coordinator and explain the contract

Once the coordinating organisation has agreed to coordinate, talk to them about the coordinator's role, support needs of your group, and the tour objectives. It is important to speak to the coordinator on the **phone** as well as by email to ensure he/she is clear about objectives, etc. Send coordinator the following documents:

- Study tour proposal
- Participants Learning Objectives Forms* (see above)
- Participants Emergency and Support Needs Forms * (see above)
- Tour Coordinators guide
- *Draft contract³*. Fill in all the parts in red, and calculate the budget by filling in the number of participants and days before sending the draft to the tour coordinator. Use the official VSO exchange rate for that month. Some of the unit costs in the draft contract in the resource pack are suggestions based on costs in previous tours, and you will need to ask the tour coordinator to make reasonable adjustments based on local costs. To calculate the 10% contingency add up all the amounts up to that point, and divide by 9. Send both the contract and the contract appendix.*

Finalise the dates and process visas

Finalise the dates with the tour coordinator, and once these are agreed start the process of applying for visas straight away.

Finalise the itinerary and in-country logistics

Ask the Tour Coordinator to return a draft itinerary **2 weeks** before the tour. Give the Tour Coordinator feedback on:

³ Items in italics are only relevant where the host PO is not coordinating the tour

- Draft itinerary – make sure you get information on the organisations to be visited, so you can arrange to have longer visits with certain organisations and shorter visits with others if necessary.
- Logistics - check the accommodation, food and travel arrangements are suitable (simply and reasonably priced, but clean and safe and appropriate for partners' needs). Check if participants will be sharing rooms, and whether partners are happy to do so. Check participants' support needs have been met, eg accessible accommodation, dietary requirements, allergies, etc. Check that travel time between meetings has been incorporated into the itinerary.
- Reflection time and action planning – make sure there is enough time in the itinerary for daily reflections and for an end-of-tour workshop that includes action planning.
- Down time – make sure that there is time for participants to relax, especially if there is a long journey or a big time difference to recover from.

Finalise and sign contract, and transfer budget

Once the itinerary and logistics have been agreed finalise the budget in the contract, and check you are within your budget allocation, with funds left over for follow up activities. If you are likely to go over budget then contact the LINKS team immediately.

The budget holder (i.e CD) should sign the contract, and send it to the Tour Coordinator, who should then sign it, and return a signed copy to you. When a signed copy of the contract has been received, ask the host PO to transfer the agreed funds to the Tour Coordinator, and to charge it to your own PO cost centre. At this stage they should not transfer the 10% contingency fund.

Eg Hosting PO in country A, pays tour coordinator in country A, but charges it to 05POB the cost centre for the sending PO in country B.

NB: *Make sure the contract is signed at least **1 week** before the start of the tour to ensure funds are transferred in plenty of time.*

If the tour is coordinated externally by a new organisation (i.e. an organisation that we have never worked with before, and not a VSO partner), do not transfer the agreed Tour Coordinating Fee until completion of the tour. If this is the case, you will need to adjust the contract so that it states the 'Tour coordinator coordinating fee will be transferred upon successful completion of the tour.'

5 (b). Pre-departure preparations

Make sure someone else in the sending PO is involved in organising the tour and is available in the primary organiser's absence.

Visas

Make sure you allow enough time to arrange visas because applications can take a few weeks. Check with the relevant embassy, but to apply for a visa, the applicant normally needs to provide the embassy with:

- A passport valid for at least 6 months,
- A completed visa form,
- Passport-sized photos,
- A letter of invitation along with a one page description of the LINKS activity they are going on. Ask the tour coordinator for this letter – they will find a template letter in the tour coordinator's guide.

Flights

Make sure visas are issued before paying for flights, as it can be hard to get flights refunded if visas are refused. Where it's practical, it's a good idea to reserve flights as soon as possible.

Health & Safety

- The tour coordinator, sending programme office, and sending PO staff member accompanying the tour should have a copy of the completed Emergency and Support Needs forms *.
- The host programme office will provide emergency back up support, whether they are coordinating the tour or not. In the event of an accident or emergency the accompanying PO staff or tour coordinator can contact the host PO for support.
- Send the final list of participants and the itinerary to LINKS and the Host PO so they know where participants are in case of emergency
- Look on Volzone for the security information for your host country. Send this to the participants prior to the pre-departure workshop, and use it to develop a session for the workshop.

Insurance

VSO takes out medical insurance for all employees and volunteers. VSO also encourages partner organisations to do the same when they send staff members on LINKS activities. The sending programme office should therefore hand out the medical briefing sheet * to all participants and encourage them to ask their employers to take out medical insurance. However, VSO recognises that there may be practical reasons why some partners cannot take out travel and medical insurance for international visits and holds some insurance to cover participants taking part in LINKS.

This insurance covers medical services and repatriation costs. VSO LINKS participants are covered for periods of hospitalisation and emergency evacuation/repatriation whilst travelling, through VSO's medical insurance policy with AXA PPP healthcare. The policy number is **44066**. It is important to note the policy will not provide cover if participants undertake any hazardous activities or sports, i.e. diving or travelling against medical advice.

There are some additional benefits, such as loss of personal belongings, with a value of up to £1,500, and delayed/cancelled flights. **To activate this policy:**

- Before travel e-mail a list of participants' names, dates of birth, destination of the study tour and dates of travel to Mike.Goodwin@vso.org.uk
- Please ask all participants to sign and return a copy of the insurance form * and send these to Mike Goodwin. This form is valid indefinitely.

In the event of an accident or ill health you should first contact the programme office in country. They will evaluate the situation and either seek local medical attention or contact AXA Assistance (the Medical Assistance company).

However in the event of a medical emergency, where you are not able to access support through the VSO Programme Office, please contact AXA Assistance directly, quoting the policy number **44066**, on:

+44 (0) 1892 513999, available 24 hours a day, 365 days a year

In the event of needing to make a non-emergency, i.e. personal belongings, insurance claim please contact Mike Goodwin on:

+44 (0) 208 780 7414, / Mike.Goodwin@vso.org.uk, available during VSO UK's normal working hours

If you have questions about any aspect of the insurance cover please contact Mike Goodwin.

Medical and security

Make sure the participants have read the following briefings before the pre-departure workshop so they are aware of the risks, and can opt out of the tour if they choose.

- Security briefing – Having read the security information for the host country participants will be aware of the risks.
- Medical briefing * – Each participant should decide for themselves on their fitness to travel and de-select themselves if necessary on health grounds.

Arrange pre-departure workshop

(See the Resource Pack for pre-departure workshop outline and adapt as necessary.)

Organise a pre-departure workshop where:

- Expectations are consolidated and the programme is agreed upon.
- Participants are briefed on financial issues such as allowances (see financial briefing sheet *) and costs in-country, local culture and language, customs and laws of the country, logistics, and the organisations they will visit. Ask the tour coordinator for this information.
- Participants take part in team-building exercises (if they don't already know each other).
- Participants consider together how everyone on the tour will be supported to get the most from the tour and participate fully. Group dynamics may be affected by factors such as gender, status and confidence of individual participants. Set ground rules for the tour during the workshop so everyone is confident to voice their opinions and questions and respect one another.
- Participants complete commitment forms *.

Arrange travel to airport

6. Accompany the tour

We recommend that a VSO staff member(s) joins the tour and that you offer logistic and programmatic support to the tour coordinator. Your role on the tour is to actively facilitate the learning of the participants and lead daily reflections sessions.

You should also facilitate participants' learning, both formally and informally. This includes promoting discussions between participants as well as organising daily evaluation sessions to keep reviewing and reflecting on what the group is learning. You need to manage the group dynamics and support quieter members of the group to get fully involved. Keep in your mind how factors such as gender and status may affect group dynamics, and use strategies to make sure every participant has a voice on the tour. For example, if some participants lack confidence to raise questions during a visit, you could try pairing up the participants and giving them a few minutes to prepare questions together

7. Post-tour

Support participants to implement action plans

When returning home from a study tour it is up to you to support and provide resources to the participants to help them share learning and begin implementing new ideas through, for example:

- Organising a follow-up workshop
- Providing capacity building support to help them fundraise
- Initiating follow-up visits
- Tracking progress on action plan implementation
- Organising in-country study tours between participating organisations
- Producing a newsletter

Tour receipts and settling the balance

Contact the tour coordinator to get receipts for all costs spent in-country during the tour, including the tour coordinator's own fee. If the full amount originally transferred was not used then ask the tour coordinator to transfer the remainder back to the host PO. If the tour coordinator spent more than was transferred to them originally then transfer them the overspend from the 10% contingency fund. Please let LINKS know if you have gone over the 10% contingency.

Produce tour report.

A Report Template * is available in the resource pack, but it is optional whether you use it - feel free to produce the report in whichever way is most useful to the participants. You are required to make sure that a study tour report is written and distributed to participants, the hosting programme office, the LINKS team and the tour coordinator within two months. The report should be written in a way that is useful to the participants and the Programme Office, and should include the following:

- Description of the activity
- What was learned, and by whom?
- How and when will the learning be implemented/built upon?
- Were there any unexpected outcomes (i.e. positive outcomes that were not in your original objectives)?
- Are there any implications for policy, strategy or practice (in-country or elsewhere)?
- Has the tour contributed to programme development?
- Are there any workshops or reports that have or will come out of the activity?
- How will they be sharing their learning with others (and who?) over the next period of time?
- Do you have any comments on the potential of this kind of activity or whether LINKS was the right tool to use?

Programme Area Review

Reflect outcomes of the study tour in your programme area review. The longer-term impact of LINKS should be identified through your partnership reviews