

From: Firelight Newsletter <newsletter@firelightfoundation.org>
Subject: Firelight Newsflash! 30 March 2009 - Focus on Exchange Visits & Mentoring
Date: March 30, 2009 1:33:41 PM PDT
To: newsletter@firelightfoundation.org

Dear grantee-partners,

Too often, we see that local organizations are overlooked as not having sufficient organizational capacity to administer external funding. Yet all agree that getting money “to the ground” is vital to ensuring that communities that are already responding to AIDS and poverty have the resources they need.

Firelight believes that peer exchange visits and mentoring relationships can be very relevant and supportive to capacity building. Sharing on-the-ground experience among organizations at all levels of development is often the best way for organizations to learn.

If your organization has never participated in an exchange visit or mentoring, the following guidelines can help you begin thinking about how such opportunities could help your organization. If your organization has done these, the guidelines will ensure that there is a clear understanding of sound practices in planning your next exchange visits and establishing mentoring relationships.

POTENTIAL AREAS FOR SUPPORT OR SHARING AMONG ORGANIZATIONS

- o Approach to working with communities and/or families
- o Issues on specific types of programs (such as home-based care, agriculture, advocacy, or PSS) or improving services for children and families
- o Leadership/management
 - o Strategic planning
 - o Governance/working with boards
 - o Decision-making/communication
- o Monitoring and evaluation/organizational learning (planning, data collection, analysis, documentation, etc.)
- o Budgeting & financial management
- o Administrative systems such as human resources, recordkeeping/information management, etc.
- o Basic skills building for staff or volunteers – such as writing, computer, etc.
- o Fundraising and resource mobilization
- o Networking and advocacy
- o ...and many others!

WHAT IS A PEER EXCHANGE VISIT?

The peer exchange is a practical and effective tool to foster learning between organizations. Exchange visits are intended to benefit all participants through an open exchange of ideas, knowledge, and sound practices. A peer exchange can be appropriate for organizations of any size, geographic reach, mission, or programs. They often are between two organizations, but may involve three or more organizations if appropriate.

The main objective of a peer exchange visit is to enable organizations to improve program quality and effectiveness for children, families and communities by learning from each other. The host organization should expect to gain as much from the experience as the visitors, if not more.

WHY ARE PEER EXCHANGE VISITS IMPORTANT?

In southern and eastern Africa, there are thousands of local organizations that are helping vulnerable children and their families. However there is little consultation among them.

As a result, lessons that are learned in one organization are not always passed on to other groups. An important way to strengthen organizations is to help them learn from each other. While it is good to network at meetings and events, often the best

way to learn from other CBOs or NGOs is to visit them and see with your own eyes what they are doing.

WHAT MAKES A PEER EXCHANGE VISIT SUCCESSFUL?

- o Clear expectations for both the host and visiting organizations developed prior to the visit.
- o A well-planned and well-implemented program, including enough time to discuss what you have seen at the end of the day.
- o A friendly and open atmosphere during the visit.
- o People from both organizations actively taking part in the activities and discussions, including organizational leaders who make decisions in the organizations and staff who are working directly with community leaders.
- o Not just sharing information, but a focus on trying to learn and identify lessons and ideas to use and adapt after the exchange visit
- o Effective follow-up and reporting.

RESPONSIBILITIES OF GRANTEE-PARTNERS IN PLANNING AND CARRYING OUT AN EXCHANGE VISIT

Host Organization

- o Establish availability and identify tentative dates for the site visit. If possible, the visit should happen at a time when the visitors can observe your activities taking place.
- o Determine who will participate in the exchange visit. Designate which staff will be responsible for receiving the visitors and taking them around.
- o Make necessary logistical arrangements, e.g. set up meetings, arrange local transport, meals, etc.
- o Inform key staff, volunteers, and community leaders of the upcoming visit.
- o Prepare and share an agenda for the visit. Consider including discussions with staff, volunteers, participants and community leaders. Don't forget to estimate and include travel times and distances between locations. Also consider including a wrap-up or closing activity.
- o Prepare any other program materials and share key documents and background information about your organization with the visitors at least 2 weeks prior to their coming.
- o Try to identify good ideas from your organization that you think might be helpful to the visitors.
- o Introduce the visits to community leaders as appropriate.

Visiting Organization(s)

- o Determine who will participate in the exchange visit. People should agree to participate in the team only if they have a genuine desire to both offer and receive new ideas and to report back to others.
- o Review and give feedback on the proposed agenda.
- o Notify the hosting organization (with enough advance notice) of the names, arrival dates/times and other relevant information about arriving participants.
- o Review the materials sent by the hosting organization.
- o Prepare to present/discuss your own organization and programs, as well as your successes and challenges
- o Ensure participants are adequately prepared for the demands of the agenda/program.
- o When you return home, share relevant information, approaches, skills, recommendations and ideas with those who did not participate.

Responsibilities of All Organizations

- o Based on the needs of both organizations, identify focus areas for activities/discussion during the visit.
- o Develop clear expectations about the visit, including:
 - o Issues to be discussed
 - o Type of activities to be carried out - meetings, focus group discussions, observation, site visits, etc.
 - o Who will participate?
 - o The program duration/length
 - o Financial responsibilities – which organization will pay for what?
 - o Who will be responsible for follow-up and reporting?
- o Maintain an open, supportive, friendly environment for discussions about programs and organizational strengths and challenges, as well as past successes and lessons learnt.
- o Provide complete, accurate and meaningful information and feedback to each other during the visit.
- o Do not act in any way that can negatively affect the reputation of the other organization during the visit.
- o Monitor participants' reactions and comments during the visit. Notify each other of any issues or problems that arise. Communicate and cooperate fully and openly with each other in relation to the solution.
- o Provide participants with a formal opportunity to comment on the program immediately following participation.
- o When the visitors return home, it is time to reflect further on what each organization has learned from the exchange experience.
 - o It is important to make an effort to share the information with your colleagues after the visit.
 - o Discuss what ideas have come out of the exchange visit and how you might go forward to adapt or enhance your organization's programs or systems.

WHAT IS A MENTORING RELATIONSHIP?

Mentoring is a term generally used to describe a face-to-face, long-term relationship between a less experienced individual and a more experienced individual known as a mentor. It is often helpful to think of a mentor as a leader who facilitates a learning process, rather than as an expert who passes down "the word" to a favored person.

Recently, mentoring has become a useful concept to describe a process where one organization serves in a role of a teacher and guide to another organization within a relationship that could be described as empowering, based on mutual trust, support, and skills and knowledge transfer that is reciprocal. (That is, it goes both ways.)

Mentoring is a tool that organizations can use to nurture and grow their programs, systems and people. An informal practice or a formal program, mentoring often includes activities between more established, larger organizations and emerging organizations so that they can learn from each other as they progress in their organizational development. However, mentoring can also occur between peer organizations.

Simply, you can think of mentoring like this:

Mentors demonstrate, explain and model.

Those who are mentored observe, question, and explore.

WHY ARE THE BENEFITS OF A MENTORING RELATIONSHIPS FOR BOTH ORGANIZATIONS?

Benefits for Organizations that are Mentored

- o Provides a non-threatening learning opportunity

- o Improved self-confidence and pride
- o Develops key skills and technical knowledge
- o Explores new ideas and approaches
- o Provides support and reassurance
- o Offers networking/partnership opportunities

Benefits for Mentors

- o Increases motivation and confidence
- o Offers an opportunity to positively influence an emerging organization
- o Offers new insights and perspectives
- o Offers a self-development opportunity for staff
- o Increases peer recognition
- o Offers opportunity to improve learning, documentation and communication.

WHAT MAKES A MENTORING RELATIONSHIP SUCCESSFUL?

- o Ongoing, open communication, feedback and dialogue
- o Attention/commitment to developing the relationship over time
- o Shared responsibility for learning between organizations
- o Realistic, shared expectations - setting a "contract" for learning, written or otherwise
- o Making an appropriate "match" between organizations
- o Good rapport and high level of trust and respect
- o A sense of independence and autonomy for each organization is maintained.
- o Well-formulated action plans – a means to provide guidance on key skills to be shared, issues to be covered, timing/regularity of activities, responsibilities and next steps for each organization throughout the process
- o Focus on capacity building through methods such as instructing, "coaching," offering and sharing experiences, modeling and advising.
- o Motivated people in both organizations
- o Effective board, stakeholder and community leader support
- o Sharing stories of both "how to do it so it comes out right" and "mistakes from which we have learned." Successes and failures offer powerful lessons that provide valuable opportunities for analyzing individual and organizational realities.
- o Recognition that continuous learning that is not an event, or even a series of events. Rather, it is ongoing experiences, observations, studies, and thoughtful analyses.

Characteristics of a Good Mentor

- o A DESIRE TO HELP - Organizations who are interested in and willing to help others.

- o GOOD REPUTATION FOR DEVELOPING OTHERS - Experienced people who have a good reputation for helping others develop their skills.
- o TIME AND ENERGY - Mentors must have and commit this to the mentoring relationship. They must be available.
- o UP-TO-DATE KNOWLEDGE - Organizations who have maintained current, up-to-date knowledge and/or skills about OVC care.
- o LEARNING ATTITUDE - Organizations who are still willing and able to learn and who see the potential benefits of a mentoring relationship for themselves.

Characteristics of an Organization That Will Benefit from a Mentor

- o Committed to expanding their capabilities
- o Actively communicates what the organization needs or wants to learn
- o A level of organizational development that includes regular planning and learning processes
- o Open, receptive, and willing to try new ways and ideas
- o Knows when to ask for help
- o Able to accept feedback and act upon it

SETTING EXPECTATIONS IN A MENTORING RELATIONSHIP

For any mentoring relationship to be successful, the organizations should develop a mutual agreement that makes expectations clear for both organizations from the beginning of the relationship. Workplan and activities can then be easily formulated and responsibilities assigned.

Expectations to be discussed and agreed upon include:

- o Goals of each organization in the mentoring relationship – how will each organization benefit?
- o Duration/length of relationship – preferably at least several months of focused work together
- o Skills to be transferred, that is, what each organization has to learn from the other based on their learning needs
- o Type of activities to be carried out - meetings, trainings, observation, visits, etc.
- o Responsible persons in each organization and who will participate in the various mentoring activities
- o Frequency of communication and feedback
- o Markers of success (indicators that the mentoring relationship is going on well and that the goals are being attained)
- o Financial responsibilities – which organization will pay for what?
- o Who will be responsible for reporting to the donor and other stakeholders?

PLANNING PROCESS - ESTABLISHING A MENTORING RELATIONSHIP

Organizations should agree on the detailed aspects of how planning will be carried out. Below are some suggested steps that may help the process move forward:

- 1) Carry out an initial meeting between both organizations during which you clarify your own **expectations for the mentoring relationship**.
- 2) Develop a contract or **agreement** that reflects these expectations for both organizations.
- 3) Perhaps in a more in-depth visit to the emerging organization, conduct an **assessment** of their current systems, policies & procedures, structures (e.g., governance, staffing, etc.), and day-to-day operations. This dialogue would help to identify strengths, resources or assets, as well as challenges or areas for improvement.

- 4) Formulate an **Action Plan** that would help to address the identified challenges or gaps. This action plan should include activities, timeline, and responsibilities of each organization. Also discuss and include **indicators of success** that can help you determine if the mentoring relationship is going on well and if both organizations are reaching their goals.
- 5) Based on the Action Plan, formulate a **budget**, if necessary.

As part of the Firelight Foundation's Monitoring, Evaluation and Technical Assistance (META) Program, Firelight provides "Newsflashes" to share relevant resources and information with our active grantee-partners via weekly emails and via post on a monthly basis. We hope that by facilitating access to information for grassroots, community-focused organizations, programming for children and families, as well as organizational development, is enhanced. We welcome your comments, feedback and ideas for upcoming Newsflashes at newsletter@firelightfoundation.org.