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# Structured Learning Visits: Guidelines and Application Instructions

New Partners Initiative Technical Assistance (NuPITA) Project

January 2010

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## **Abbreviations and Acronyms**

<b>AIDS</b>	<b>Acquired immunodeficiency syndrome</b>
<b>NPI</b>	<b>New Partners Initiative</b>
<b>NuPITA</b>	<b>New Partners Initiative Technical Assistance (NuPITA) Project</b>
<b>SLVs</b>	<b>Structured learning visits</b>
<b>TA</b>	<b>Technical assistance</b>
<b>USG</b>	<b>United States Government</b>

## **I.0 Background**

### **I.1 NuPITA**

The New Partners Initiative Technical Assistance project (NuPITA) is providing support to partners in Kenya, Nigeria, Rwanda, South Africa, Tanzania, and Uganda. NuPITA works with these organizations to provide technical assistance and support in areas of compliance, organizational development, HIV and AIDS, and monitoring and evaluation.

The New Partners Initiative (NPI) was developed to expand the reach of HIV and AIDS prevention and care programs by providing funding opportunities to organizations with established presence in local communities but no prior experience managing United States Government (USG) funds. A key objective of the New Partners Initiative is to build the capacity of these organizations to: 1) manage grants from the USG and comply effectively with USG regulations and requirements; 2) develop their organizations into stronger entities that will be able to better source USG and other funding and continue and/or expand programs after the NPI grant comes to an end; and 3) strengthen the ability of the organizations to implement high-quality HIV and AIDS programs.

USAID awarded a contract to John Snow Incorporated (JSI) to provide technical support to NPI partners in organizational development, management of USG funds, and HIV and AIDS program implementation. The NPI technical support contract (NuPITA), implemented by JSI with its partner Initiatives Inc., provide assistance to organizations over the three-year period of their awards.

### **I.2 The NPI Partners**

#### Round 2

1. American Refugee Committee International (ARC) – Minnesota, USA, working in Uganda.
2. Camfed USA Foundation (Camfed) – California, USA, Working in Tanzania.
3. Children’s Emergency Relief International (CERI) – Texas, USA, working in South Africa.
4. Integrated, Community-Based Initiatives (ICOB) – Bushenyi District, Uganda.
5. Tearfund – Teddington, United Kingdom, working in Kenya.
6. Woord en Daad – Gorinchem, Netherlands, working in South Africa.

#### Round 3

7. Ananda Marga Universal Relief Team (AMURT) – Maryland, USA, working in Kenya.
8. European Cooperative for Rural Development (EUCORD) – Brussels, Belgium, working in Nigeria.
9. Francois – Xavier Bagnound Foundation (FXB) – New York, USA, working in Rwanda and Uganda.

- 10.** GOAL – Dublin, Ireland, working in Uganda.
- 11.** Grassroots Alliance for Community Education (G.R.A.C.E) – working in Kenya.
- 12.** Kinderothlife (KNH) – Duisburg, Germany, working in Kenya.
- 13.** Minnesota International Health Volunteers (MIHV) – Minnesota, USA, working in Uganda.
- 14.** Retrak – Manchester, United Kingdom, working in Uganda and Ethiopia
- 15.** Tearfund – Teddington, United Kingdom, working in Zambia.

These guidelines have been developed for NuPITA staff and other individuals that may be involved in planning, and implementing structured learning visits (SLVs). It is worth noting that these guidelines can be adjusted depending on the needs of a particular SLV.

## **2.0 Justification for SLVs**

### **2.1 Why Structured Learning Visits (SLVs)?**

The SLVs are a method that is employed by NuPITA to build the capacity of NPI partners to increase their performance in the respective thematic areas of work. These visits will provide an opportunity for the partners to quickly learn from the field experiences of others by acquiring more information, learn new approaches, and build networks. Through these visits, NPI partners are also able to assess the relevance of their own approaches, which will lead to creativity and innovation. Discussions and dialogue during the visits will provide NPI partners with first-hand information, answers to specific questions, and understanding of how particular concepts manifest in the field.

### **2.2 Objectives**

The SLVs will have three broad objectives;

- Increase partner information/knowledge on specific concepts as undertaken by other organisations implementing similar activities.
- Support NPI partners to establish relevant networks and contacts with other organisations.
- Facilitate the development of action plans for NPI partners to address specific gaps identified during the visit.

### **2.3 Who will they target?**

NuPITA should provide guidance on the number of people to travel, but in general terms, staff directly responsible for the activities to be covered in the SLV will participate. In addition, the SLV may be undertaken in the country where the NPI partner is based or in another to provide learning opportunities.



## **3.0 The Structured Learning Visits**

### **3.1 Initiating the SLV**

Each of the supported partners is entitled to one SLV during this year (Oct 09 – Sep 2010). Using [the SLV request form](#), partners will present a request to NuPITA to undertake a learning visit. Request should be submitted at least 4 and 3 months in advance for international and national visits respectively.

In assessing the need for the SLV, NuPITA will consider other methods for realising the objectives. These methods might include manuals, reports, information from the internet, and technical assistance visits.

### **3.2 Preparation**

Learning during the visits is expected to be two-way i.e. the host organization will also learn from the visiting NPI organisation. The NPI partner should plan take along materials they can use to present their own activities. This might include brochures and reports, but also diagrams, maps, charts, photographs, slides, and videos. Other planning activities might include:

- Supporting the partner to refine SLV objectives and plan.
- Identifying the most suitable organizations to host the partner.
- Developing a briefing guide for visit that provides an overview of the organizations to be visited, a description of their activities in relation to the SLV objectives, and possible discussion points during the visits. It also contains visit logistics.
- Designing an evaluation form.

### **3.3 Organizations Hosting**

The goal and expectations of the SLV should be clearly explained to the hosting organizations. If possible, a pre-visit will be organized to discuss the following;

- Dates for the visit.
- Goal and objectives of the SLV.
- Specific learning objectives for each of sessions.
- How the sessions will be facilitated.
- Introduce the visiting NPI partner.
- The itinerary of the visit.
- Logistics (accommodation, travel, visual aids, etc.)

If required, NuPITA may hire outsiders working in the locality who can play a role in bridging between hosts and visitors.

### 3.4 Language

Unless both hosts and visitors happen to share a native tongue or are fluent in a common language, translation is likely to need attention. Unless otherwise indicated, the staff of the respective host organizations will act as interpreters. However, participants are encouraged to learn simple phrases like thank you, hello, and good-bye, which will help to build and maintain rapport.

**Note:** *If an interpreter will be used, it may take twice as long so the schedule needs to be adjusted accordingly.*

### 3.5 Facilitation

Each of the sessions during the visit will be facilitated and guided to ensure that the participants realize their learning objectives. The facilitators must have strong facilitation skills and a fair understanding of both organizations. The facilitator will be responsible to develop the learning objectives for each of the sessions during the visit and to ensure that the visit is focused.

### 3.6 Roles of individuals involved in the SLVs

1. **NPI advisor-at-large (NuPITA)** – Overall coordination of SLVs, guides partners in selecting appropriate visits, supports facilitators in setting learning objectives, and helps partners implement action points with the help of other specialists and TA provides available to NuPITA.
2. **Operations manager (NuPITA)** – Primary function of organizing the logistics for the SLVs. Works with other finance and administrative staff in NuPITA.
3. **Facilitators** – Set objectives for each of the SLV sessions and guide discussions on the various aspects of the SLV. Has the primary responsibility of ensuring the objectives are met. These individuals may be NuPITA staff or hired consultants.
4. **NuPITA specialists, NPI advisors, and TA providers** – Support partners to refine action points and provide TA in their implementation.

### 3.7 Evaluation

After the visit, both the hosts and the visitors will participate in an evaluation to reflect on the outcomes of the visit. The evaluation can be both informal discussions and formal systematic approaches to ranking different aspects. Specific areas that may be evaluated and ranked include:

- Transport
- Accommodation

- Facilitation
- Interpretation services
- Food
- Materials and handouts
- Amount of time allocated
- Relevance of the information

Refer to the sample evaluation form in Appendix 5

### **3.8 Action Planning**

Before the visit, the NPI partner is expected to present a plan on how it will use the information from the visit. These plans will be refined after the visit and NPI partner has obtained a better perspective of the issues in question. Where possible, a few hours at the end of the visit will be used to review and finalize the action plan. Please use the action planning tool in the Appendices section.

## 4.0 Planning for Logistics

All logistical arrangements will be managed by the NuPITA office in Kampala. In some cases, administrative responsibilities may be taken on by JSI in countries where they have offices

### 4.1 Travel (international and in-country)

**International** – It will be responsibility of NuPITA to seek for concurrence for all individuals that are travelling, though in some circumstances, the NPI partner will seek approval if they are responsible for the costs.

NuPITA will book all air tickets but will make the various travel arrangements with the traveling individuals to select appropriate routes.

NuPITA will refund money spent on travel related cost like visa fees, vaccinations, transport to the airport, etc. However, the traveling individuals need to communicate with NuPITA in advance. Refunds will only be made after presentation of receipts.

NuPITA will make all effort to provide the travelling individuals with information on travel requirements and restrictions.

**In-country travel** - Reduce time spent travelling to ensure that the visitors are less exhausted and more time is left to activities directly related to learning. It is also desirable that the visitors to maximize the opportunities for learning.

All transport arrangements will be made by the hosting organization based on the agreed program. NuPITA will directly pay for all the costs of travel, through a staff member or any other assigned individual participating in the exchange visits.

### 4.2 Accommodations

The hosting organization can help identify the most suitable places for accommodation in line with USAID regulations and guidelines.

### 4.3 Food

Take into account all the dietary restrictions and needs of the people who are traveling and make special arrangements if necessary.

The host should not be required to prepare meals as this may not have been budgeted for and creates unnecessary hardship. The visiting organization should provide allowances to take care of all the meals. However, if it is difficult to get decent meals in remote areas, the hosting organization may organize this, though it should be in compliance with USAID regulations.

#### **4.4 Culture**

Visitors on a SLV need to be oriented to the basic cultural practices of the people they will be visiting. This will help them to avoid any actions that may be deemed as offensive. Furthermore, understanding the culture of the people being visited strengthens the conceptualization of different development problems. An introduction to the relevant cultural aspects can be made at the beginning of the visit.

#### **4.5 Resources**

What about insurance during travel? Will it be covered? Think about any additional resources you may want to provide and make sure that these are included in your planning and budget.

# Appendices

## Appendix I: Planning Checklist

**Why?** Define objectives; decide if exchange visit is the best choice.

**Who?** Team composition. How are they expected to benefit? Consider mix of backgrounds, seniority, gender, community members and agency staff, language skills, facilitation skills.

**Where?** International or domestic? What recommendations? How many sites to visit?

**When?** Check travelers' and host's schedules, budget availability, major holidays, climate, and lead time for permissions and travel documents.

**What?** Discuss plans with hosts. Mix activities to fit interests and learning styles. Allow enough time for informal discussions, reflection and rest.

### *Implementation*

**Documents:** Itinerary, tickets, passports, visas, permission from employers, travelers checks, health insurance forms, dictionaries and other books, materials for presentations.

**Accommodation:** What type? Shared or individual rooms? Special equipment (e.g. mosquito nets). Reservations.

**Vehicles:** Size, mix hosts and visitors, avoid cavalcades and exhaustion.

**Food:** Identify dietary restrictions. Monitor.

### *Follow-up*

Reporting session

Send any materials promised to hosts

Send thank you letters

Written Report

## Appendix 2: Sample Evaluation Form



### **New Partners Initiative Technical Assistance (NuPITA)**

#### **Structured Learning Visit (SLV) – Evaluation Form**

**Date:** (dates of the visit) :.....

**NPI Partner:** (Insert the name of the partner) .....

**Hosting Organization** .....

#### **Objectives of the visit:**

Obj 1:

Obj 2:

#### **Please answer the following questions**

- What did you like best?
- What did you like least?
- What do you suggest to make future visits better?

## Appendix 3: SLV Request Form



### New Partners Initiative Technical Assistance (NuPITA)

### Structured Learning Visit (SLV) Request

Date (submission date) :.....

Proposed dates for the visit:.....

**Note:** Proposals should be as concise as possible and are limited to **two** typewritten pages comprising the following information, excluding attachments:

#### I. The proposed SLV

- Describe themes to be addressed by the SLV.
- Description of goals and objectives of the SLV.
- Mention the proposed host organization and explanation why it was selected (if a host organization has been suggested). **Note:** the selected organization may be changed after discussions with NuPITA.
- List of individuals (name and title) who will participate in the exchange visit and reasons for selecting them.
- Show how the NPI partner plans to use the proposed visit to address the need or problem.

#### II. Follow-up

- Plan how the organization will use and/or disseminate what is learned from the SLV.

**Note:** NPI partners will be required to submit a revised plan after the exchange visit has taken place.



## Appendix 4: Thank You Letter

Print on NuPITA headed paper

[Date]

[Name]

[Title]

[Organization]

[Address]

Dear Sir/Madam,

Thank you for recently hosting [insert name of organization/s] and taking time to share your experience with [insert the main focus of the visit]. We hope that the visit helped to [in one sentence write the hoped-for long-term results of the visit e.g. *We hope that the visit helped to make clear how to manage and improve the database.*]

Specifically, [insert the organization] learned the following during their time with you: (insert bullet points of the key learning's during the visit).

Again, thank you. NuPITA greatly appreciates your generosity.

Sincerely,

*Barbara Durr*

**Director NuPITA**

## Appendix 5: Action Planning Tool

**Title of visit [Insert the title of the SLV]**

Date of visit

Objectives of the visit

Obj 1:

Obj 2:

Plan for action

No	Issue	Action Required	By Whom	Due Date
1				
2				
3				
4				
5				
6				
7				