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1. This Report

This report evaluates the second WINGS-CF peer match programme undertaken in late 2002, following on from the first pilot exchange in 2001-2002. The second programme involved exchanges between:

- Community Foundation Network, UK (host) and Philanthropy Australia;
- Centro Mexicano Para la Filantropia, A.C./Mexican Centre for Philanthropy, Mexico (host) and Charities Aid Foundation Russia;
- The Institute for the Development of Social Investment/IDIS, Brazil (host) and Community Foundations of Canada (this last was a return visit, IDIS having visited CFC in the first pilot match).

This evaluation of the second programme differs from the first in that it covers a) three exchanges and b) only immediate reactions to the exchange (i.e. it does not assess longer-term effects as in the previous evaluation).

The focus of the evaluation was also somewhat different. The key questions were:

- The extent to which participants felt the programme provided a valuable opportunity for learning
- The extent to which participants felt supported by WINGS-CF
- The tangible and intangible learnings gained by participants
- Participants' ability to share those learnings with colleagues and/or to influence organizational practice
- The value of the programme to Board members
- Any comments on improvements to the programme.

Sections 2-4 provide a general background to the exchange programme for those unfamiliar with it.

2. Origin of the Peer Exchange Idea

The idea of face-to-face exchanges between community foundation support organisations came out of the 2000 WINGS-CF Peer Meeting in Ottawa, Canada.

Organisations at that meeting recognised that, whatever their other differences, by definition they share an interest in supporting community foundations. There are no easy or eternal answers to how this can be best done – not least because of the diversity of environments in which support organisations operate and because those environments are constantly changing, throwing up new opportunities and new challenges. WINGS-CF is a constantly learning network and the peer match format was seen as one way of putting mutual learning into practice – sharing strategies, problems and solutions rather than each discovering the wheel alone.

Sharing Knowledge

Community foundation support is a relatively new activity. The newness of community foundation support activities and of many organisations in the network create a need for systematisation and sharing of knowledge. But, at the same time, the variety of contexts, resources, ages and stages of WINGS-CF participants create a demand for customisation of knowledge. WINGS-CF has made huge strides in global sharing of knowledge via electronic and other means. But electronic and other written communication depends on codified knowledge which in turn runs the risk of premature blue-prints, simplification and so on. These in turn may generate less than fully effective implementation unless such knowledge is ‘owned’ by all members. In this situation face to face exchange can increase understanding, expand and deepen knowledge, temper simplification and premature blue-prints, and increase identification with and ownership of knowledge. Importantly, face to face communication can tap into tacit knowledge which by definition is so hard to codify but which often holds the key to effective practice.

3. Overall Purposes of the Exchange

The overall goals of the exchanges remained the same as those of the first programme:

- Mutual Exchange and Learning

The overall purpose of the exchanges were ‘mutual exchange and learning’. More specific goals were established for each of the exchange partners as part of the planning process prior to the visits, to be refined during the course of the visit.

- Sharing Learning within the Partners’ Regions

A second purpose of the visits was: to share the results of the exchange and learning with community foundations in each of the participating organization's regions.

- Sharing Learning with the WINGS-CF Network with a View to Future Programmes

A third purpose was to share the results of the exchange and learning with the broader WINGS-CF network with a view to a continuing programme.

- Intangible Benefits

It was also agreed that less tangible benefits of the exchanges (such as feeling part of the network and increased commitment/enthusiasm) should be included in the evaluation process.

4. Exchange Phases

Again each exchange was assumed to have four key phases:

- (1) Pre visit contract and planning, identifying goals, exchange of information and design of the programme
- (2) The visit
- (3) Post visit communication between partners
- (4) Trickle down into organisations and beyond

Pre-Visit Planning

Participants in the exchange were informed that participation in a match of this kind would involve: E-mail and telephone contact between the partners over a period of

two months, to establish shared goals for the on-site visit including topics for the main focal points of the visit; which personnel in each organisation to involve; meeting formats to be used during the visit (e.g. one-on-one conversations between partner personnel, visits with local community foundations, participation in host organisation meetings, etc.). These conversations were to form the basis for development of an agenda for the visit, a list of expected achievements and benefits for partner organizations, input to the evaluation process and criteria.

This planning phase also covered visa and travel arrangements and costs. WINGS-CF provided between \$4,000 and \$5,000 US to cover expenses associated with the visit, including flights, accommodation and meals. Identifying who should attend was determined in part by the topics to be the focus of the visit, as well as budgetary limits.

The Visit

See below.

Post Visit

Participation in the exchange also meant agreeing to take part, immediately following the visit, in communications to evaluate the programme, via e-mail and telephone communication with an external evaluator.

It was also hoped that participants would disseminate their learnings from the visit within their own networks.

5. The Exchange in Practice

The Variety of Participants

Participants varied considerably in the number of years of experience they had with community foundations. Involvement with community foundations varied from just over a year to 12 years. The majority of participants were paid staff with organizations involved in community foundation support but their roles and positions within their organizations varied considerably. For the first time, one visiting organization included a Board member as a participant (as suggested in the previous evaluation).

In addition, there were significant differences in the concept and level of development of community foundations in the six participating countries, as well as in economic, political and cultural differences. I return to the issue of differences below. Here it is worth noting that despite these differences, within and between matches, all participants reported that they found the experience enriching and valuable. Participants in different exchanges, and different participants in the same exchange, gained different things. Whatever the roles, experience and interests of participants the matches appear to provide something for everyone.

Meeting Needs and Expectations

All participants reported that the programme met, or exceeded, their needs and expectations. Those with least experience with community foundations appeared to be more likely to feel that the exchange exceeded their expectations. This may suggest that less experienced participants should have priority in selection for the exchange programme.

No one reported any needs not met by the exchange programme, although the one Board member directly involved as a visitor suggested that it would have been useful to have had a meeting with the funder to gain insight ‘as to their strategic intent regarding community foundations’ in the country visited. Board members needs may be different and need to be considered separately.

Barriers to Understanding

No participant reported any major barriers to understanding to mutual understanding, although, in retrospect, several would have liked more briefing on the political, economic and cultural background of the country visited and, in particular, the role of the voluntary sector and the position of community foundations. Given the language and cultural differences in some of the matches the lack of major barriers is a tribute to WINGS-CF, the host and visiting organizations. Several participants commented on the helpfulness of host countries in providing translations and interpretation – but, given that the common language was English, this obviously also required effort on the part of some visitors and hosts.

One participant commented on problems of terminology related to different concepts of community foundations; and another noted differences in the focus of community foundations (endowment building versus flow through fundraising) in the host and match countries but saw this as an interesting difference rather than a problem.

It may be worth considering what degree of similarity, or at least prior awareness of any significant differences, should be a match criterion in future.

Most Useful Parts of the Programme

There was considerable variation in views of most useful parts of the programme, and tangible learnings, related in part to the different roles, needs and expectations of participants. Some participants, hosts and visitors, found the overview and strategic discussions with host organisations were most useful, providing the challenge and stimulation of a different approach to common problems: *'the exchange provided a different perspective to our work. Specifically, the linkage between civic engagement and community philanthropy to the freedom we have for personal involvement in a democracy'*.

Others emphasized the value of site visits and acquisition of tangible, practical processes and tools.

‘The (CFN) New Directors’ course was a great model for bringing new staff of community foundations together and encouraging a collegiate atmosphere and peer network. We will factor this in when organizing next year’s programs’

‘The visit to XXXX Community Foundation was possibly the most useful of all activities..... It was very useful to visit a community foundation to gain an understanding of its operations and to speak to its staff to gain an understanding of the areas in which they felt the membership body was and could be of assistance to them.’

‘Ideas for training courses, and developing a (city) community foundation and realizing how crucial fundraising is and different ways of doing that’

In one exchange there was a significant difference in concept and operations between the two organizations. Although this difference was seen as interesting, a site visit to another more similar organization was seen as most useful, not merely for the visit itself but also as a platform for further exchanges.

In another case, the host emphasized how site visits had enabled other community foundations in the country to widen their relationships and learn from international experience.

Intangible Benefits of the Programme

All participants reported a variety of wider, less tangible benefits from the exchange. In the current ‘hard measures’ culture, these are easy to underplay, precisely because they cannot be measured, but were clearly hugely important to the majority of participants. Intangible benefits included new ideas, time to think, new contacts and networking, feeling part of a wider network, gaining new perspectives and renewed enthusiasm.

'I have become more thoughtful about ... the role community foundations play in encouraging civic engagement.'

'The feeling of being part of a wider network that supports the development of the sector and is willing to do it considering, caring and respecting similarities and differences providing the feeling of being able to find help and support when needed as well as to give it to others.'

'Our institutional relationship was strengthened, and we had the chance to develop friendships individually as we shared personal experiences, traveled together, spent time together.'

'It gave us the opportunity to learn more about how community foundations operate successfully in contexts different from the US.'

'A renewed commitment to linking local and national work with an international perspective.'

'It was a great treat to get away from the demands of the office (as an observer) I felt released from the responsibility (and the tension) of being an active participant, in large part responsible for the success or otherwise of these events or activities. This meant that I felt free really to listen and observe, and think about what was happening before me, without the worry of trying to translate it in my head, simultaneously into practical operations. I didn't have to worry about money, or staff or time resources – instead I could just focus on the concepts and issues being discussed and the pros and cons of the various positions that were put.'

'Being away from our office really made it much easier to fully immerse myself in the experience and absorb so much more information'

'The value of being able to take some annual leave and recharge one's batteries, and see the sights and learn something of other cultures should not be an under-rated

benefit of the program ... I came back to work refreshed and enlivened by the experience.'

Many of the wider, less tangible benefits above had not been anticipated and were highly valued perhaps partly because they came as a surprise bonus.

The only unanticipated cost of the exchange was reported by the Philanthropy Australia staff visiting CFN in London: *'London is very expensive – doing the currency conversion when purchasing meals will send you insane very quickly!'* Although the 'frugal living' was considered well worth the benefits of the exchange, it may be worth considering whether visits to some cities require an extra allowance.

The Special Value of Face to Face Exchanges

In an age of electronic communication, face to face visits may appear an expensive luxury. But all participants emphasized that the vast majority of the benefits of the exchanges noted above could definitely not have been gained by other means. Over and over again participants emphasized that there is *'no substitute for being able to actually meet people and spend time with them'*. *'It is by being with people that the greatest learning can take place – a learning that basically provides a mirror for reflection'*.

Face to face exchanges created real personal relationships which it was felt would survive longer and be 'used' more often. Face to face exchanges were also considered superior in that information, experiences and ideas are not distorted or misinterpreted in the way that other forms of communication (perhaps especially email) can be.

Board Members and Exchanges

As noted above, all but one of the visiting participants were staff members. In the previous evaluation report it was suggested that Board members might usefully be included among visiting participants (in host organizations Board members are more easily and commonly involved by attending meetings with visitors): 'it may be worth considering whether there is a need for inclusion of Board members from the visiting

(and host) organization to maximize the likelihood of fully incorporating learnings from the exchange post visit. One of the key challenges emerging from the case studies was the need to build a strong committed board. We all know the importance of getting the Board on board with new ideas and approaches, and how damaging it can be if staff and Board do not sing more or less from the same hymn sheet. Is there a case for Board exchanges?’ (Report on the First WINGS-CF Peer Exchange Programme 2001-2002, see Appendix One).

The Board member included in the CFC visit to IDIS was enthusiastic about the experience and about the value of such an experience for other Board members. One major benefit was *‘To be challenged to grow, through connections and thinking, and then to provide leadership to the Canadian movement’*.

Staff, too, felt that participating in an exchange would be of value to their Board members: *‘By experiencing on their own the chance to learn from colleagues and friends, their approaches, their successes and failures, board members widen their vision as well, increase their own commitment, and are able to make better decisions.’*

Sharing Learning with Colleagues and Networks, and Changing Practice at Home

A majority of participants were unsure how much they would be able to share learnings directly with others, or thought that this would be limited. In part this was because of lack of time: *‘The follow up process is difficult. Once we come back to our organization, the day to day operations do not allow time enough to implement all we want to as a result of the visit.’* In part, sharing learning was considered difficult because the major benefits had been personal development.

Even so it was clear that participants’ learning would be built into their practices in developing and supporting community foundations at home: evaluating current strategies; building in learning from site visits to plans for future work, approaches and courses and so on. In addition, as noted above, in some cases others had already

gained direct benefit from site visits and contacts with the host organization's international visitors.

The Role of WINGS-CF Support

All participants were satisfied with the support provided by the WINGS-CF Secretariat. The only additional support suggested by one participant was additional background material on the visited organization and its context, visited, but another participant noted the background briefing as one of the most valuable aspects of WINGS-CF support. This difference may have something to do with the needs of different participants and to the degree of difference between their own situation and that of the host organization.

Building on Experience

Given their high satisfaction with the role of WINGS-CF it was not surprising that few participants had any suggestions for things that WINGS-CF might do differently. One suggestion was to make the visit longer but this person noted that, however long the visit, there would always be a desire to have more time to learn more. Other suggestions were: matching organizations at a similar stage of development, documenting learnings, continuing to ensure that there is ample time for informal social interaction, allowing more time for planning, ensuring that the agenda meets the needs of all participants (e.g Board members may have different needs from those of staff) and shorter evaluations.

6. Conclusion

There is no doubt that these exchanges are very highly valued by both hosts and visitors. It is difficult to generalize about the different benefits for hosts and visitors because some exchanges were between organizations at a similar stage of development whereas in others the host or the visitor was more experienced than the other. The majority of the benefits applied to both hosts and visitors, but some benefits were greater for hosts as compared with visitors and vice versa. These are noted below.

Building on Accumulated Experience through Sharing

The participants gain a variety of tangible benefits, sharing approaches, tools and methods in developing and supporting community philanthropy. This sort of knowledge diffusion is both effective and efficient, allowing community foundation support organizations to engage in their missions and tasks by building on accumulated experience. The way in which participants in WINGS-CF share time and knowledge so generously is commented on by a number of respondents. The role of WINGS-CF provides the impetus and vehicle for this sort of sharing should not be under-estimated.

Overcoming Obstacles

It is also a tribute to the commitment to sharing on the part of participants and WINGS-CF that there were very few reported obstacles to understanding. Despite the potentially large language and cultural obstacles, the only obstacle mentioned was the difficulty for some participants of accessing written materials in another language (face to face interactions were translated into a common language, usually English). To an extent, of course, this conceals the significant barriers to participating in an exchange if an organization does not have a command of English.

Time to Think

In addition to the tangible benefits of the exchange programme it is clear that there are enormous intangible benefits. For visitors, the value of being away from the office, is clearly very highly valued. Obviously, hosts do not gain the benefit of literally being away from the office, but may still gain the benefit of ‘time out’ from the daily routine and the stimulus and challenge of having to explain and present their work to others.

The dangers of burn-out and lack of time to stand back to see the wider picture are well known in small, often under-staffed nonprofit organizations. The fact that community foundation support organizations and their staff are, almost by definition, working alone in their country/region adds to the pressure and lack of opportunities to take time out for a wider view. Arguably, community foundations have some important work to do in identifying their distinctive niche and philosophy but it seems

that, all too often, keeping the office running takes precedence over asking and answering fundamental questions. The exchange programme clearly gives participants a very valued and valuable opportunity to think and reflect, at the very least questioning why they do things the way they do, and at the very least re-charging their batteries. Where else do community foundation support staff have the time – the ‘luxury’ which is really a necessity – to think?

In this second programme there was a much greater sense that this had been genuinely useful to host organizations as well as visitors. Hosts explicitly commented on what they had gained from the visitors’ presence and input. A small number of evaluation comments raised questions about the viability of the host organization approaches in certain areas – it would be interesting to know whether these are fully and directly communicated to hosts.

Benchmarking

Exchanges not only provide community foundation support and development staff with new knowledge, tools and relationships within which to share problems and anxieties, but also a means of informal benchmarking. As one participant put it: *‘one of the unanticipated benefits was It always seems as if one could do so much better, if only one was better organized, better resourced, more resourceful.... The peer exchange visit functioned as a kind of informal benchmarking exercise and reassured me that although there is still much more (we) could do and learn we were operating pretty well’.*

Participants and Programme Content

Although all the exchanges were highly valued, it is clear that some were seen as more valuable than others. The success of an exchange appears to depend partly on the way in which the participants ‘gel’ during the exchange; in part this seems to be related to personalities, as well as what people bring to the exchange in terms of their own capacities for learning, reflection, making connections and seeing the general in the particular. The success of an exchange may also be related to the contextual, conceptual and organizational similarities and differences between the host and

visitor. Differences in concepts, context and stage of development can be challenging, but may also seem so great that the practical value of the exchange is reduced. It may be that WINGS-CF needs to discuss with participants the level of difference they would find most useful in the exchange matching process. More detailed briefing papers on background concepts and political, social, economic and community foundation contexts may also be worth discussing.

Another factor in the success of an exchange may be the specific content of the programme, although this clearly has to be adapted to the particular needs of the participants. Nevertheless, some common themes emerge: the value of time for ‘relaxed’ conversation, the value of site visits and the value of time for informal socializing, building relationships and turning colleagues into friends. Interestingly, as in the previous evaluation, one of the most successful exchanges was one in which the visit was built around the existing meetings and activities of the host organization. This seems to be a potentially less costly option for the host organization and highly valued by the visitor. Arranging exchanges around existing activities obviously requires advance planning and the ability of the visiting organization to fit in with the host organisation’s schedule.

As noted above, the specific content of the exchange visit will require adaptation to the particular needs of all members of the visiting party. Board members may have somewhat different needs and interests from those of staff.

Changing Practice and Building Continuing Relationships

Although some participants were sufficiently honest to admit that they did not know how far they could directly share their experiences with others in their home networks, it was clear that many learnings from the exchanges would be shared indirectly with others via changes in strategies and programmes. In addition, the exchanges had value to others via site visits and the relationships that were established in the course of these. Building a platform for future ongoing relationships between host and visitor organizations, as well as with other organizations encountered during the visit, is undoubtedly a real, long term benefit of the exchanges. These new

relationships are particularly important and valuable in a world in which people work in isolation for reasons noted above. Knowing that other people share the same problems and challenges, frustrations and disappointments is in itself a huge support; if those others may also suggest a solution, or know someone who might, that is an added bonus.

A Service to Local Member Organisations

Local organizations in the host and visitor countries indirectly gain benefits from the acquired knowledge of their support organization. Local organizations in the host country may also gain directly from the exchange if they are included in meetings with visitors. Hosts may also gain from the presence of visitors, demonstrating their value to member organizations, providing local community foundations with an international showcase, learnings and new contacts.

Involving Board Members

The inclusion of one Board member among the visitors in this second exchange programme was successful and would certainly be worth repeating and possibly expanding. Inclusion in the exchange has benefits in terms of learning, sharing an experience with staff (and potentially all the benefits of that in implementing any subsequent changes in the organization), providing time for reflection and gaining new perspectives. In addition, staff members were unanimous in suggesting that their Board members would gain from the experience in the ways already noted, as well as increasing their understanding of, involvement in and commitment to the potential of community foundations.

International Significance and Understanding

Hosts and visitors may also gain from the exchange as a means of demonstrating to Board, staff and the wider community, including in some cases the media, the global importance of community foundations and support organizations. This may be particularly true for hosts. In addition, host organizations may especially value the opportunity to increase international understanding of their work, their particular contexts and challenges, and their country.

Cheap at the Price

Community foundation support organizations typically spend little, if anything, on training, development, and support of staff and Board members. In a job that can be very lonely, frustrating and often thankless, and in a context of huge political and short term pressures and expectations, community foundation development and support should be seen as long term community development. There is an urgent need for more realism about the tasks, timetable and pressures involved.

The WINGS-CF exchange programme provides a combination of practical applicable learning and intangible, but hugely important, thinking time, personal development, morale building, benchmarking and making investments in relationships which will grow, continue to provide support and probably multiply at a geometric rate. The programme provides triple benefit to hosts, visitors and to other community foundations in the host and visitor countries. Any business getting these benefits for \$4,000 to 5,000 USD would regard this as ridiculously cheap at twice, if not five times, the price.

Perhaps the last word should come from one participant who wrote to thank WINGS-CF: *'I regard it as one of the highlights of my working career ... I cannot tell you how wonderful it was to have the opportunity to look, listen and learn, without the immediate corollary responsibility for funding and implementing an initiative – the extraordinary luxury of being an observer, able to ask questions, and think, rather than do... with the (exchange) visit in mind I think we will be able to do it more expeditiously and successfully'.*

APPENDIX ONE: Key Extracts from the WINGS-CF Pilot Peer Exchange Evaluation Report

Issues for Consideration in Planning Future Exchanges

In some respects this was not a typical exchange. Nevertheless there are lessons to be learned.

Selection and Matching of Participating Organisations

CFC is a relatively large and well-resourced organization. CFC did not see planning the visit as difficult, but it was time consuming. The budget was modest and mainly consumed by the visiting organisation's travel costs; other costs were absorbed by CFC's operating budget. (It is worth noting here that TCFE gives 500 Euros to the host organization to compensate for the work involved in hosting an exchange).

This raises questions about the capacity of smaller organizations to bear the direct and indirect costs of acting as host organization. Apart from time and staff, some small organizations may simply not have the space easily to accommodate visitors. For both visitors and host organizations the greatest costs are likely to be in time and opportunity costs not just in planning the visit and in making it but in catching up with workload after the visit. Furthermore, additional capacity is required if the exchanges are to have the intended effects of incorporating learning down the organization and spreading it outwards to other organizations in the region. After 4 months this has only been achieved to a limited extent, largely, it seems, because of lack of time and resources in the smaller organization (IDIS).

Those selecting organizations for participation in an exchange, as well as those selected, need to consider capacity very carefully. Organisations need to ask themselves whether they can really cope with an exchange and make maximum use of it. One aide to such consideration might be for organizations invited to participate to be immediately put in touch with organizations who have already undertaken an exchange with a view to full and frank discussion of the real costs and stresses, as well as the gains, involved. For host organizations the costs of an exchange are likely

to be greater than for the visitors, and as organizations with greater experience the gains may be correspondingly smaller. But in calculating potential benefits host organizations should take into account the potential benefits to Board and staff members who do not usually have the opportunity to be exposed to international learning. At CFC, for example, staff members who do not usually attend international conferences reported that they found the exchange enormously useful and stimulating.

It is also worth noting that CFC had the great advantage of a member of the WINGS-CF secretariat in-house; this meant that there was 'a clear understanding of what this was to be about'. Secondly, as a membership association, CFC is used to having visitors around - its members - and planning for those visits. Hosts without these advantages may have to pay more attention to maintaining focus on the exchange as a WINGS-CF learning event, and planning for and 'incorporating' visitors.

Another issue to consider in selecting organizations to participate in exchanges concerns the degree of sameness and difference between partners. How similar and how different should partners be? One set of differences are cultural. A degree of cultural difference may be stimulating – but too much difference may produce little learning of practical value. In considering cultural sameness and difference there may be a case for exchanges within regions (this could also reduce travel costs and time).

Another set of differences concerns age and stage. At what stage in the organisation's life cycle/development are peer exchanges likely to be most useful? Here it is important to distinguish between peer exchange visits and the sort of more one way learning that can be so valuable when a new organisation is starting up. Should we go further and distinguish between start up learning, middle age - capacity building, and longer term sustainability and growth. In each of these stages community foundations and support organisations may have very different needs which may not be of immediate interest or concern to organisations at a different stage of development.

In this exchange the pre-existing relationship between the partners (commented on very positively as an observation by others) certainly contributed to the success of the exchange.

This raises questions about selection of participants, as well as matching and the pre-visit phase. Is a prior relationship an important criterion in selection and matching, or could completely new relationships have a much longer pre-visit phase to enable participants to get to know each other (e.g. through regular conference calls or via meetings at international gatherings)?

Pre-Visit Planning

This exchange highlights various issues for consideration in the pre-visit planning phase.

First, this phase may need closer to four months than the two months originally anticipated. Furthermore, at the risk of stating the obvious, the time allowed should take into account holiday periods (which may be different for each organization). In addition, this exchange highlighted the need to build in time for flexibility – in all organizations and environments unanticipated events do occur, and plans, and participants, need to be able to accommodate these. Again this may suggest the need for choice of host organizations with a level of organizational capacity able to accommodate such changes.

Choice of staff, and other organizations, to participate in the exchange requires careful thought. Age and stage factors may be important in the choice of individual exchange participants. Are senior staff members likely to give and get more from an exchange than middle managers? This may be particularly important for visiting organizations. What happens if senior staff members are ever present in the exchange – does this reduce the likelihood that more junior staff will feel able to ask questions, provide alternative viewpoints and discuss problems?

A mix of senior and less experienced staff may require extra attention to the ways in which the latter may most fruitfully and fully participate in the visit. It may be worth

considering setting up separate meetings for different staff within the programme so that each has some individual time and space to explore issues of their choosing within the visit.

Somewhat differently, it may also be worth considering whether there is a need for inclusion of Board members from the visiting (and host) organization to maximize the likelihood of fully incorporating learnings from the exchange post visit. One of the key challenges emerging from the case studies was the need to build a strong committed board. We all know the importance of getting the Board on board with new ideas and approaches, and how damaging it can be if staff and Board do not sing more or less from the same hymn sheet. Is there a case for Board exchanges?

In this planning phase exchange participants need to work on identifying and clarifying their learning goals. In this case IDIS identified a large number of learning goals – possibly too many to be covered in the space of one visit. But, in reality, the participants had one external, shared focus (raising money for a future partnership). This clear focus was obviously helpful in ensuring elements of a common agenda. Should all exchanges have at least one clear, relatively tangible focus? It may be useful to ask participants jointly to identify one or two clear primary goals, with, if necessary, a larger number of topics to be explored for further follow-up after the visit.

The Programme

The programme for this exchange was arranged around significant CFC events. This was obviously helpful to CFC as hosts but it appears to have had a number of other advantages. It provided opportunities for spreading learning inputs and outputs more widely among staff, Board members and other organizations, as well as providing the visitors with the opportunity to take in some of the ‘feel’, style and culture of CFC and its tacit knowledge often so crucial in understanding a setting but which cannot, by definition, easily be codified and formally transmitted.

The various social events arranged by CFC probably had the same effect in enabling host and visitors to exchange this sort of tacit knowledge which can only be conveyed in conversation and through 'just being around'. In the tendency to emphasise focus and efficient use of time, it is important to be aware of the importance of unscheduled time and social events for transmission of tacit knowledge that cannot be communicated easily by, for example, electronic means.

One potential down-side of arranging the visit around existing events may be that extra effort needs to be made to build in time for learning from the visitors.

Length of the Visit

It may also be worth considering the length of the visit required to ensure maximum effectiveness. On the one hand, a longer visit may make it impossible for some smaller organizations to participate; on the other, a longer visit may provide time for in-depth exploration of issues and greater transfer of tacit knowledge. Again it is worth noting that TCCF exchanges last for three weeks.

Conclusion

The first stage of the WINGS-CF peer exchange was assessed by the participants as a very valuable exercise. The second stage of the evaluation focused on the longer-term effects of the exchange. After four months the exchange is still viewed by both partners as a valuable experience and has tangibly affected the plans of IDIS. But the speed of putting learnings into practice has been slower than originally anticipated, ongoing contact has been limited, and the trickle down/out learning restricted. This is probably because three to four months is too short a period over which to achieve or assess such effects, especially in organizations with little spare capacity. At this stage it may simply be too soon to see the wider learning results. Three to four months is also clearly too soon to comment on the lasting organisational learning created by the exchange. Another evaluation in six or perhaps 12 months may be worth considering.

In the meantime, as discussed above, the exchange has already provided various points for consideration in planning further exchanges. Four final points are worth

considering. First, there is now a growing number of international community foundation support organizations which all, in one way or another, aim to encourage transfer of knowledge and learning. How can these organizations share their experiences and learnings about how best to encourage learning and knowledge transfer? For example, where and how might TCCF and WINGS-CF share ideas and experiences regarding the value of exchange visits and the conditions under which this value can be maximized? Is there a need for formal channels of communication between international community foundation support organizations? Second, and closely related, how can we increase our understanding of the relative value of different techniques for international/global and inter-cultural knowledge transfer and learning? For example, are there lessons to be learned from international/global businesses in this process; what are the strengths and limitations of electronic and face to face communication? (A joint research proposal on these matters is currently in preparation at LSE and UCLA).

Third, it is worth reflecting on the extent to which the peer exchange visit topics/focii can best address the key common issues identified in the case studies, and learnings from the exchanges shared with the wider network.

Finally, in focusing on the tangible benefits of the exchange in terms of transfer of knowledge, the less tangible benefits should not be overlooked: feeling part of a bigger network, realising that other people have problems too, developing broader cultural awareness, addressing similarities and differences, seeing your own situation from a different perspective which can be so vital to creativity, avoiding burn out and building longer term trust and relationships.