

STUDY VISIT

/ Learning about programme experiences by seeing them up close /

WHAT IS A STUDY VISIT?

A study visit involves a team of participants from one country (the visiting country) travelling to another country (the host country) to observe and learn from the implementation of a programme or policy. Participants get access to knowledge and firsthand experience from the host country on how to overcome a development challenge or implement a solution. This approach is often used to support South-South knowledge exchange. It may also be used to share knowledge between project sites within a country.

For a study visit to be successful, visitors and hosts should plan it together, to agree on the objectives of the visit and to ensure a good understanding of each other's expectations. Selection of the appropriate activities during the study visit – e.g. technical assistance or policy dialogue through interviews, workshops or site visits – will depend on the scope and type of the knowledge required by the visiting country to support the identified capacity development goal.

REQUIREMENTS:

There are several pre-conditions or requirements which must be in place in order to successfully apply this tool:

- *Identification of the development challenge you want to address, and the specific gaps in programme development and implementation capacity, which the study visit will help overcome.*
- *Identification of potential host country (or more than one) which has achieved success in the same or similar development goals, and which may be open to a study visit.*
- *Clear commitment and active leadership from the visiting country partners.*
- *At least one organizer from the visiting country who can dedicate time to detailed and in-depth planning of the study visit.*
- *For UNICEF-supported study visits: Support from the Country Offices in the visiting and the potential host countries.*

The outcome of a successful study visit is to enable participants to adapt and apply newly acquired insights, skills and capabilities through action in their home countries. It is therefore important that the visiting participants include relevant stakeholders (who are usually technical development officials) with appropriate background knowledge in the programme or policy area which is the subject of the visit.



WHEN AND WHY TO USE

After identifying the development challenge to be addressed and the gaps in programme development and implementation capacity, the next step is to decide whether a study visit is the best way to fill them. Study visits can be costly and time consuming to organize, so it is important that they are well planned to maximize their benefit. From a South-South cooperation perspective, reviewing the various available modalities and tools for supporting learning and networking is an essential part of the planning process, to ensure that a study visit is the most appropriate modality to use.

The value of a study visit is that it enables the visiting country to address an identified development challenge using insights, good practices and lessons learned from a host country that has successfully tackled similar challenges in the past or is currently addressing similar challenges. A study visit provides opportunities for mutual learning. It fosters face-to-face interaction and deep exploration of issues among visitors and hosts, which helps give decision-makers and technical officials a detailed understanding of the programme or policy solutions for a given development challenge. It transmits lessons from the host country on what has worked and what has not, and on advocacy, key political decisions taken and necessary budget allocations. It offers visiting participants first-hand practical demonstrations 'on the ground'.

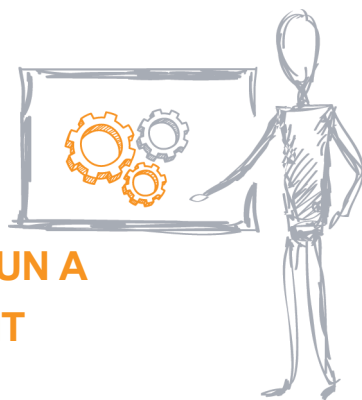
The participants in a study visit can include government officials, parliamentarians, policy-makers and technical specialists. Participating personally in learning events and demonstrations can have much more impact than reading about them. Getting practitioners involved in listening, talking and doing will likely result in a better understanding of how to tackle a challenge, and may offer new or potentially innovative solutions arising from interaction and exploration of similarities and differences. The visitors are thereafter better able to customize, replicate and scale up solutions when applying them to their own circumstances.

The visitors will also become more aware of their own skills and capabilities as they learn about how the specific issue was tackled, or how the solution was implemented. This will enable them to share their own experiences for the potential benefit of the host country. The sense that others are wrestling with the same issues, trying to realize some of the same ideas, and seeking to move in a similar direction, can dramatically strengthen optimism, enthusiasm and political commitment.

Study visits enable knowledge transfer among governments that have gone through, or are going through, similar development challenges. In the context of South-South and horizontal cooperation, country-to-country knowledge exchange among two or more countries is part of global development efforts towards achieving the Sustainable Development Goals. Governments in the South drive this process by seeking to identify, share and adapt solutions based on firsthand knowledge at the national/institutional, state/provincial and local levels. In the spirit of South-South cooperation, the opportunity for mutual learning is always emphasized.

A key principle of study visits is that they involve horizontal cooperation and problem solving among equals. The value emerges from a two-way flow of communication, sharing knowledge back and forth directly among all participants; this is much more effective than either one-way communication or

communication channeled through an intermediary. Bringing hosts and visitors with similar roles together, under conditions of openness and mutual trust, will promote mutual learning and two-way sharing of experiences, ideas and both formal and tacit knowledge. Tacit knowledge encompasses the knowledge that a person calls upon when carrying out a particular task or solving a problem; some of this knowledge is so 'embedded' in the process that it is usually not well communicated until the person with the knowledge is asked to solve problems similar to those that they have solved in the past.



HOW TO RUN A STUDY VISIT

Assessing available options

Study visits can be very valuable if well prepared and wisely conducted, but all development modalities have their limitations, and study visits are no exception. For example, there is no assurance that the ideas encountered in the host country are all suitable for application in the visiting country under different conditions.

There may be alternatives which could better meet the objectives. For example, if the goal is to acquire information already available in published form, then there may be no need to travel. If specific knowledge and skills are required, then training or workshops could also be as good as, or better than, a study visit. An overview of some available options is provided by the 'Quick Guide to Choosing a Tool' in this

Toolbox; the article on Project-Specific Knowledge Management Plans offers details on planning for learning before, during and after any development project. In most cases, a study visit in the context of South-South cooperation needs to be complemented by other modalities to ensure sustainability and impact.

Next steps after deciding on a study visit

Study visits require clear objectives and careful planning to ensure effective learning results. With a clear objective, visiting participants are more likely to take an active and structured approach to gathering information and analyzing what they learn.

Study visits have three phases: A) planning, B) implementation, and C) follow-up. All three are equally important for ensuring that the visit remains a focused learning opportunity, not a tourist excursion. The planning phase includes defining the objectives and participants. Implementation covers the visit itself. The follow-up phase is for giving feedback, documenting what was learned, applying lessons, and evaluating the results to understand the impact of the study visit.

A. Planning

1) Identification

The visiting participants should understand the broader development priorities which the visit will support, identify the knowledge gaps and learning needs and define the programme challenges the study visit will help resolve. It is also necessary to identify the potential counterparts (host countries) with relevant knowledge, and to consider what long-term changes are expected after the visit. In addition to programme design, other factors that

might influence the choice of host country include similarities between the countries in terms of size, government system, language and culture, as well political relations between the countries, and a potential host country's willingness and capacity to receive visitors.

Visitor and host participants should also be identified in the planning phase by selecting people whose qualities, roles and functions match the objective of the visit, who have willingness to play an active role in the discussions and observations during the trip, and who have commitment to acquire and share knowledge once they return from the visit. Visiting participants should also have the authority and ability to take follow up action on their return. Asking questions about their motivation, expectations and future commitments will help make these decisions.

2) Formulation and Approval

Effective study visits are based on a detailed Terms of Reference that is prepared and agreed upon by the visitors and hosts in advance, to ensure that planned activities are well selected and relevant issues addressed. Depending on the objectives of the study visit, different activities should be planned to bring the participants together around the knowledge gaps and learning needs, and to capture and document the information, milestones and highlights of the visit. Pre-visit discussions should explore the options and clarify what activities visitors and hosts think might be the most worthwhile and feasible to cover the institutional, technical and operational objectives. Once agreed, the Terms of Reference should serve as a clear statement of the roles and responsibilities of the host and the visitors.

The Terms of Reference should address the following points related to logistics and technical and content preparations:

- ▲ Sharing roles and responsibilities between host and visitors.
- ▲ Timing and duration of visit.
- ▲ Preparations for travel and administrative formalities.
- ▲ Compiling/creating relevant background materials for the visit.
- ▲ Costs and allowance for participation, including who will pay for what.
- ▲ Identification of relevant activities for the specific issue addressed (theoretical and/or practical information).

Where appropriate, study visits should be formulated as part of a long-term capacity development plan rather than as one-off initiatives.

For a more detailed description and an example of a Terms of Reference for a study visit, see 'Guidelines for Trilateral South-South Cooperation Initiatives' by the Brazilian Cooperation Agency of the Ministry of External Relations and UNICEF (2017),

<http://socialprotection.org/connect/communities/community-practice-ssc-children-cop-ssc4c/documents/guidelines-trilateral-south>.

For a more detailed explanation of study visit design, see 'The Art of Designing and Implementing Study Tours' by the World Bank (2017),

<https://openknowledge.worldbank.org/handle/10986/28405>.

The role of UNICEF

Study visits supported by UNICEF should be brokered and organized through focal points in the UNICEF Country Offices in both the visiting and the host countries.

The role of the focal point in the visiting Country Office is to help organize as well as formulate the Terms of Reference and to be part of the selection of the relevant participants.

The role of the focal point in the host Country Office is to follow up with the government and other local partners to ensure that the activities are suitable and well planned (including local logistics) to support the objective of the study visit.

B. Implementation

During the Study Visit, close engagement between hosts and visitors, in accordance with the Terms of Reference, is fundamental to applying the chosen activities and succeeding with the visit. It is important to:

- ▲ Respect the established calendar and programme.
- ▲ Ensure discipline and respect for differences (values and customs) throughout the visit.
- ▲ Stimulate a willingness to listen and communicate among participants, both visitors and hosts, and to encourage all participants to take an active role in discussions and debates.
- ▲ Document the entire process in order to enable opportunities for daily feedback. In particular it is necessary to take notes and photos, to record interviews and to take samples if possible.

There should be daily wrap-up meetings for visiting participants to take turns in giving their impressions, explaining what they have learned and asking questions. This is essential to support the learning process and to help assess the

results of each day. Visiting participants should complete evaluation forms both during important activities and at the end of the study visit, to help monitor the visit, and to identify and record preliminary evidence of learning results. The evaluation forms should focus on relevance and quality of the activities, of the knowledge sharing tools and methods, and of the learning resources.

The role of UNICEF

During the implementation phase the UNICEF Country Offices, in both the visiting country and the host country, can play the role of brokers, and can provide complementary technical advice and inputs on the strengths and weaknesses of the national programmes or policies, as well as recommendations on how to improve them.

C. Follow Up

After the study visit it is important for the visitors to prepare a feedback report for the hosts, to share information on their experience and to provide recommendations for any future visits. The hosts probably spent considerable time receiving and supporting the visitors, so it is important to thank them and give them useful feedback on what was learned and how this will be put into practice. All of this will help assure the hosts that their time was well spent.

Visitors should also prepare a final report and evaluation of the visit. The report offers an opportunity for visitors to plan how to put the acquired knowledge into practice in concrete terms. It will also help share the knowledge with others in the visiting country: Study visits should benefit not only those who travel but also those who stay home.

The final report should summarize the objective of the study visit, the key learnings, the highlights during the visit, and any next steps, including follow up on any additional activities needed, e.g. additional visits, teleconferences, requests for supplementary materials, etc. The report should be clear and instructive, to make it easy for others to understand the information gathered and the knowledge, skills and lessons

acquired. It should serve as a long-term reference. To kick off preparation of the final report, all visitor participants should join in a one-day session held soon after the visit, at which they will wrap up their experiences and contribute to the content and organization of the report.

The following questions are helpful to guide the preparation of the report and evaluation:

- ▲ What worked well and why?
- ▲ What did not work well and why?
- ▲ What should be done differently next time?
- ▲ What recommendations can be made for the future visits?

A successful study visit should lead to positive changes in the visiting country, as the knowledge acquired is put into practice, and as new practices based on the study visit learnings are discovered, validated and applied. It is therefore equally important to monitor and evaluate the long-term impact of a study visit in the visiting country. A short follow-up report, prepared six months or one year after a study visit, can summarize the impact and evolving results of the visit. According to the World Bank¹ the participants may want to answer

¹ World Bank, 2017, 'The Art of Designing and Implementing Study Tours':

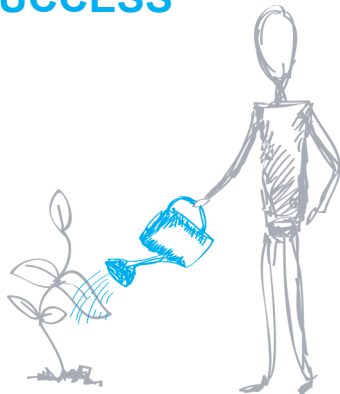
<https://openknowledge.worldbank.org/handle/10986/28405>

the following questions:

- ▲ Since the study visit, how have you been able to apply what you learned?
- ▲ What specific changes (new policy, revised processes etc.) have been realized since the visit?
- ▲ What barriers have you encountered in applying what you learned during the study visit?
- ▲ What else could you have learned on the study visit that would be useful?

For more detailed description and an example of how to follow up and provide feedback after a study visit, see 'Guidelines for Trilateral South-South Cooperation Initiatives' by the Brazilian Cooperation Agency of the Ministry of External Relations and UNICEF (2017), <http://socialprotection.org/connect/communities/community-practice-ssc-children-cop-ssc4c/documents/guidelines-trilateral-south>.

TIPS FOR SUCCESS



A few tips will help pave the way for a successful study visit:

- ▲ **Planning:** Ensure enough time is spent in the planning phase to prepare thoroughly for the visit. A well-planned study visit will result in a better knowledge exchange experience, since all participants will be better informed, more

prepared and focused on the objective of the visit.

- ▲ **Communication:** It is important to not make any assumptions during a study visit; instead, ask plenty of 'how' and 'why' questions, to better understand the contexts and perspectives around the specific solutions in the host country.

- ▲ **Language barriers:** In cases where the hosts and visitors do not share a native tongue or are not fluent in a common language, translation/interpretation services will be necessary. This will result in the communication taking up to twice as long. Schedules should accommodate this accordingly.



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Annex 1: Checklist for running a Study Visit

Planning

- ✓ Define objectives.
- ✓ Decide if study visit is the best choice.
- ✓ Identify a host country and choose counterparts.
- ✓ Choose members of the visiting team.
- ✓ Define how they are expected to benefit from the visit.
- ✓ Consider language skills: is translation necessary?
- ✓ Consider facilitation skills: do you need additional team members for meeting/process facilitation?
- ✓ Confirm budget availability.
- ✓ Create a draft TOR and timetable, and discuss with host.
- ✓ Ensure lead time for permissions and travel documents.
- ✓ Choose relevant activities and learning processes.
- ✓ Build in time for informal discussions, reflections and rest.

Logistics (part of planning phase)

- ✓ Documents: tickets, passports, visas, health insurance, security clearances (if needed).
- ✓ Accommodation: reservations, special equipment and other needs.
- ✓ Vehicles: size, mix of visitors and hosts.
- ✓ Food: identify dietary restrictions.

Implementation

- ✓ Ensure you bring key materials, including phrasebooks, dictionaries, and materials for presentations.
- ✓ Adhere to the plan and schedule.
- ✓ Make provisions for ongoing monitoring.

Follow up

- ✓ Hold a one-day reporting session to kick off the final report.
- ✓ Send out any materials promised to hosts.
- ✓ Send thank you letters.
- ✓ Finalize all written reports.
- ✓ Follow up after six months or one year