

Exchange Visits Quick Guide

1. **Context in which used:** Targeted individuals are unaware of but curious about certain performance improvements. Facilitator wants to interest and motivate targeted individuals in certain performance improvements. Facilitator wants to develop common perception that certain performance improvements are the new competitive norm. Facilitator wants to influence opinion leaders and makers about the value and importance of certain performance improvements.
2. **Behavior change**
 - a. Skills building ◆
 - b. Conviction ◆◆◆
 - c. Role modeling ◆◆◆◆
 - d. Reinforcing mechanisms ◆◆
3. **Objectives:** targeted individuals...
 - a. Take steps to adapt and apply similar performance improvements to their circumstances
 - b. Communicate to others about the nature and value of certain performance improvements
4. **Preparation**
 - a. Identify and develop interest of role model
 - b. Develop session plan with role model for the exchange visit; possibly includes
 - How to describe the performance improvement (activities, resources, benefits, etc.)
 - Hands-on opportunities
 - Questions and answers; exchanges of experience
 - Exchange of contact information
 - c. Determine (but not necessarily subsidize) logistics: timing, transport, meals, lodging, etc.
 - d. Handout materials
 - e. Evaluation (written form or verbal)
5. **Delivery** (*see Ownership & Sustainability issues)
 - a. Clarify objectives
 - b. Ensure good connection and rapport between role model and visitors
 - c. Help summarize key findings and conclusions
 - d. Listen for follow-up opportunities and new information
 - e. Facilitate evaluation of visit by visitors and role model (what did you learn, appreciate, dislike, intend to do, etc.?)
 - f. Maximum participants: 5 - 10; minimum: 1
6. **Follow-up**
 - a. Conduct After Action Review with role model firm (tailor questions and appeal to role model's interests) even if facilitator was not present at the visit
 - b. Wait for expressions of interest (**see Ownership & Sustainability issues)
 - c. Identify opportunities with targeted individuals committed to making similar performance improvements; have offer of support ready
7. **Ownership & Sustainability issues**
 - a. *Facilitator does not necessarily need to be present during exchange visits. Getting a targeted individual to visit a role model can be used as a test to demonstrate commitment. If the facilitator is

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not participating at the actual exchange visit, even greater importance is placed on preparation. However, for exchange visits of 3 or more people, the facilitator's participation is advisable.

- b. **Facilitator may instruct targeted individuals that if they are interested and committed to making similar performance improvements that they should contact the facilitator.
- c. Targeted individuals should make sufficient contribution for their participation in the exchange visit to ensure genuine interest and ownership

8. Possibly combined with...

- a. Cost-sharing: share costs with targeted individuals for logistics, especially if distances are far
- b. Workshop: Exchange visits could be an outing during a workshop
- c. Training: Exchange visit could be an outing during a training
- d. Mentor/Consultant: Exchange visit could be organized and facilitated by mentor/consultant who is a recognized subject matter specialist