COMMUNITY CONTACT

How communities can plan and conduct exchange visits and study tours

Based on experiences in Botswana, Namibia, South Africa, Zambia and Zimbabwe
A COMMUNITY MAKING CONTACT – OUR STORY

This is a story about linking people and sharing experiences. It is about new visions, and finding solutions to old problems. Sometimes these lie unnoticed under our feet, or arise in our imaginations. We, the people of the Suid Bokkeveld, have lived at the edge of the desert for many generations. We make our living from livestock and indigenous rooibos tea in an arid world of harsh landscapes and poor soils. The end of political oppression has not brought prosperity to the people of the Suid Bokkeveld. How can we create a better life for ourselves, using our unique skills, fortitude and imagination?

This is the story of two journeys undertaken by the people of the Suid Bokkeveld, to learn how other communities have created new economic opportunities for themselves by caring for their environments and their heritage, and sharing this with others.

In two workshops we developed a shared vision for development, and a common understanding of the rich resources available to us. We explored the social, physical and economic constraints that we face, as well as our opportunities.

Next we developed ideas for visiting other communities to learn from their experiences. When we had approval for our proposal, we planned how we could share the experiences, and who should be selected to go on the visits.

We networked with other NGOs and government agencies and formed a team to facilitate the visits. The team learned the skills needed to facilitate the visits, and developed a team contract so that it could be self-managing.
Learning objectives for the visits were developed. We needed to know what we wanted to learn about, and we needed to be able to share this with our hosts. We made plans for the journeys on the basis of people's needs and limitations. The delegation included a mother and her baby, and an older person who could not walk easily. We encouraged people to think of bringing small gifts that would be appreciated.

We made final arrangements with the communities to be visited, in some cases via the NGOs or government agencies that support them. We let them know what we wanted to learn about, and finalised logistical arrangements.

The visits were the highlight of the process. We prepared a written programme so that people would have a clear idea of where we planned to be each day. Rapporteurs were selected to report back on our return. We held workshops with the people we visited so that experiences could be shared, looked at what they were doing and discussed this with them, and we evaluated regularly. Before we left each place we thanked our hosts, handed over presents and exchanged contact details.

After we had returned home we held workshops to share what we had experienced with those who stayed behind, and to plan future initiatives.

Now we have come full circle. Since the visits, the Heiveld Small Farmers Co-operative has been established, and has already opened up new marketing channels for rooibos tea. The farmers have all been registered as organic producers. Community tourism facilities have been built by a women's group. Training will take place soon to help the entrepreneurs build up these new businesses. There is new hope and enthusiasm in the Suid Bokkeveld. This is not the end. It is another beginning.

(Source: Video text of Suid Bokkeveld exchange visit, from Environmental Monitoring Group)
Acknowledgements

This manual is based on information and experiences gathered during a number of interactions with communities in the Southern African Development Community (SADC) region. Most information was derived from communities working under the umbrella of community-based natural resource management (CBNRM) in Botswana, Namibia and Zimbabwe. The experiences of Integrated Rural Development and Nature Conservation (IRDNC) in conducting exchange visits with conservancies in Namibia contributed significantly to the document. Aino Humphrey and Chris Weaver (World Wildlife Fund/LIFE Programme) provided further valuable inputs and insights on the Namibian experience. Noel Oettlé, under the auspices of the Environmental Monitoring Group (EMG), contributed valuable material derived from exchange visits among communities in Namaqualand, South Africa. Gables Nawaseb contributed information from relevant community interactions in Namibia in the context of Namibia’s Programme to Combat Desertification (Napcod) and Forum for Integrated Resource Management (Firm). Nicky Allsopp shared her experiences with communities in Namaqualand, under the auspices of the LandCare Project. Information from the Zambia Alliance of Women (ZAW) was incorporated. Nicky //Gaseb, John Pallett and Mary Seely of the Desert Research Foundation of Namibia (DRFN) assisted with editing. Sharon Montgomery offered several ideas. These contributions are highly valued and have been combined to create what we hope is a useful and functional reference manual for communities and study groups.

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How to use this guide

The guide has been split into the three different stages of an exchange visit or study tour. These are:

Section 1: Planning ... before the trip
Section 2: Conducting ... during the trip
Section 3: Follow through ... after the trip

Each section provides a guide to aspects for consideration for your trip. Every trip will differ and while some aspects will be suitable for your trip, others may not apply to the trip you are planning.

Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>CBNRM</td>
<td>Community-based natural resource management</td>
</tr>
<tr>
<td>CETP</td>
<td>Community Exchange and Training Programme</td>
</tr>
<tr>
<td>DREF</td>
<td>Desert Research Foundation of Namibia</td>
</tr>
<tr>
<td>EMG</td>
<td>Environmental Monitoring Group</td>
</tr>
<tr>
<td>FIRM</td>
<td>Forum for integrated resource management</td>
</tr>
<tr>
<td>GTZ</td>
<td>Gesellschaft für Technische Zusammenarbeit</td>
</tr>
<tr>
<td>IIEC</td>
<td>International Institute for Environment and Development</td>
</tr>
<tr>
<td>IRDC</td>
<td>Integrated Rural Development and Conservation</td>
</tr>
<tr>
<td>NAGSO</td>
<td>Namibian Association of CBNRM Support Organisations</td>
</tr>
<tr>
<td>NAPCOOD</td>
<td>Namibia's programme to combat desertification</td>
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<tr>
<td>NGO</td>
<td>Non-governmental organisation</td>
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<tr>
<td>PAR</td>
<td>Participatory action research</td>
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<td>SADC</td>
<td>Southern African Development Community</td>
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<td>SADDI</td>
<td>SADC-DREF Desertification Interact</td>
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<tr>
<td>UNCCD</td>
<td>United Nations Convention to Combat Desertification</td>
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<td>WWF</td>
<td>World Wildlife Fund</td>
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<tr>
<td>ZAW</td>
<td>Zambia Alliance of Women</td>
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</table>
Introduction

Many groups have, for a variety of reasons, undertaken exchange visits and study tours in their own countries or in other Southern African countries. These groups include government workers, NGO workers, community groups, traditional leaders, youth groups, teachers and school learners. Communities and community projects are hosting more and more of these visiting groups. Currently, a number of programmes in the SADC region promote community participation and encourage community exchange visits. (See Appendix 1: Programmes promoting community exchange visits in the SADC region).

Community exchange visits are an effective way of learning and gathering new ideas. They expose hosts and visitors to hands-on experiences of new areas, processes, people and projects. At the same time, conducting visits can encourage teamwork and build confidence amongst the participants. Sharing experiences and expertise, while learning in a new environment, enables people to broaden their vision beyond their own community, country or project. People feel pride in being able to share their knowledge, and they also benefit from the learning derived through constructive feedback.

Planning and conducting community exchange visits requires careful preparation and hard work for success to be assured. This manual is based on the experiences and feedback from community groups that have participated in exchange visits and study tours. It incorporates the lessons learnt from actual visits. The objective of this manual is to give very general guidelines to facilitators and community members regarding the planning, conducting and follow through of exchange visits. It also offers ideas and examples for discussion and experimentation, to encourage community members to use their own ideas when planning and conducting exchange visits. It can be used to conduct visits locally, nationally or regionally. Communities can use this manual on their own, with their own selected group leaders, or with the assistance of an experienced facilitator from a development organisation. It should be noted that the central objective of exchange visits is for participants to learn about the developmental issues that concern them. The participants should be constantly aware that they have learning goals to attain during the course of the trip. This learning process is supported by well-planned logistical arrangements.
Section 1
Planning ... before the trip

This section of the manual has been split into the different aspects you can plan and organise before leaving on your trip. These are:

1. Identifying learning goals and sharing the community exchange concept
2. The trip proposal
3. Drawing up the budget
4. The programme/itinerary
5. The participants
6. Money
7. Accommodation
8. Food
9. Transport
10. Health and emergencies
11. Equipment
12. Trip formalities
Chapter 1
Identifying learning goals and sharing the community exchange concept

Why are you planning an exchange visit?
This is the most important question when planning a trip. Perhaps your community has
identified a particular need. There could be a need for more training on a particular topic, or
perhaps a group in the community is about to start a development project but first wants to
learn how other people have tackled the same issue. To keep to the central objective of
exchange visits, that of learning about relevant developmental issues, the participants should
engage in a process of learning, exchange and participation. The example below illustrates
how a community entered into this learning process:

The objective of the first pilot project of the CETP (Community Exchange Training
Programme) in the Suil Bokkeveld, South Africa, was to enable community members to
improve their lives, and to promote the sustained use of natural and cultural resources. The Suil
Bokkeveld community is a resource-poor, dryland community dependent upon sheep production
and indigenous rooibos tea cultivation. A process of learning about developmental issues was
set in motion through knowledge exchange, facilitated learning and planning undertaken in
partnership with appropriate support agencies. The processes were well documented to enable
learning from, and replication of the approach. In essence, this was a participatory action
research (PAR) approach, and its success rested upon ownership residing in the community.
Here is an example of a PAR course of action:
Participatory action research (PAR) is one learning methodology that can be used by communities undertaking exchange visits. It asks and provides working answers to these basic questions:
- what knowledge is to be produced,
- by whom,
- in whose interest,
- and to what end?

For further information on participatory action research, refer to "Participatory Learning & Action: A Trainer's Guide" (Pretty, Guliit, Thomson & Scoones), published by ILED, or www.iied.org and www.planotes.org

It assumes that in a truly democratic society, knowledge is not simply for the people, but created with and by the people. In action research processes, all participants should be clear that they are engaged in a process of empowerment, in which they are self-responsible for improving their situation.

Whatever the reason for planning the trip, there should be a well-defined purpose for the activity. "Community" implies sharing: sharing of culture, identity, interests and characteristics. The following example illustrates how community members can be engaged in the community exchange process:

The CETP project in the Suid Bokkeveld was initiated through a request from a government department to support its efforts to foster development in the community. Through informal discussions, facilitators encouraged community members to consider ways of improving their livelihoods. A consultative workshop included a visioning exercise and an inventory of local resources. Community members drew up problem and objective trees. Improved rooibos tea production and marketing, and community-based tourism were identified as ways in which livelihoods could be enhanced in the Suid Bokkeveld.

Community members then discussed the need to visit other communities to share experiences and learn from one another. The facilitators assisted community members to develop a project proposal to apply for funding to enable members of the community to learn from other rural communities about improving their livelihoods through community-based enterprises. A "communication map" was drawn to clarify how information would be shared within the Suid Bokkeveld community after the visit. The community links identified were between the Suid Bokkeveld and community-based tourism groups in Namaqualand (Northern Cape Province), the rooibos producer group in Wupperthal (Western Cape Province) and honeybush tea producers in the Eastern Cape. The proposal was presented to and supported by the South African UNCCD National Co-ordinating Body.
Designing the learning process
Learning is something that we all do every day. Exchange visits should be designed to help people to learn more effectively, so that by the end of the visit they have learned what is most important to them.

People involved in exchange visits are voluntary learners. They will participate only if the process interests them. To design a good learning process, we should keep in mind what helps adults to learn better:

- We learn best about what interests us, and what is important to our livelihoods.
- We learn best in a relaxed, unthreatening environment.
- Active involvement and participation with others encourages learning.
- We learn well about things that we have some experience of, and can relate to.
- We learn most easily from people like ourselves, who share many of our experiences, and live with similar circumstances.
- We learn best what we can see, hear and experience.

The great value of exchange visits is that people learn from “people like us”, whose experience and advice they trust because they realise that their circumstances are similar. The design of the exchange visit should help people get to know one another and to have enough time to talk together in a relaxed way. If the group is a large one, the process should avoid long sessions where only one person at a time is talking. As far as possible, break large groups up and encourage people to interact, while keeping focused on the purpose of the visit. Experiential learning is the very best way to share knowledge. Use any opportunities to let the visitors “learn by doing”. Rather let visitors struggle a bit to learn how to make a grass mat, instead of just telling them how to make one.

Selecting the host community
The host community would be selected on the basis of information and experiences that they can share related to the needs of your own community. In the above example, the host communities were known to have developed expertise in the growing and marketing of rooibos tea. This knowledge would be useful to the Suid Bokkeveld community, which had identified rooibos tea cultivation as a means of enhancing livelihoods.

How will visiting and host communities be prepared for the visit?
The chapters that follow describe the steps to be taken by the visiting community members as they prepare for their journey to the host community. Preparation is important for both groups, as they both need to “own” the process and agree on the purpose and objectives of the trip. The host community needs to be briefed on the background, expectations, special needs and learning objectives of the visitors. This preparation can be done directly or through NGOs or local networks. The exchange visit concept should be shared with the host community, and objectives, budgets and logistics can be discussed. While the visit may be an open-ended learning process that allows for unexpected outcomes, it should be balanced by careful planning and effective reflection on learning.
Chapter 2
The trip proposal

The trip you are planning must directly address a need
Community members should be clear about:

- why they are embarking on an exchange visit,
- what they hope to gain from the visit,
- who would offer the most relevant information: another community, a government department, an NGO or the private sector.

When the group returns from the exchange visit, the members should have a clear plan and be able to apply what they have learnt. The trip needs to be relevant and useful for the future of the participants. For this to happen, the trip requires careful planning and the setting of clear objectives. Here is an example of exchange visit objectives:

The Ehi-rovipuka Conservancy Committee identified the following objectives for their planned exchange visit to Botswana (June 2002):
- To facilitate the exposure of Ehi-rovipuka Conservancy Committee to the experiences of other communities and projects involved with CBNRM, including the lessons they have learned, the different approaches used and the challenges they are currently facing and vice versa.
- To expose participants to Botswana’s environmental and cultural diversity.
- To provide exposure and training for the accompanying government and NGO staff members.
- To meet and share ideas with government officials from other regions and countries who are involved with the implementation of CBNRM.
- To enable participants, some for the first time, to experience what it means to be a tourist.

Once the participants are clear about the need and the objectives of the trip, you will need to develop a proposal for funding the trip. You may have to submit your proposal to the manager or director of your organisation for approval. You may have to look for money by fundraising from other organisations.

Writing a trip plan/proposal
Your proposal can be short and simple but should include enough information for the potential funder to have a clear idea about what you want to do.
**Writing up your proposal**

Here is a possible layout for a proposal. Begin with a covering page containing the following information, for example:

<table>
<thead>
<tr>
<th>Title:</th>
<th>&quot;Omulinga Community study visit to Botswana&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementers:</td>
<td>Namibia Training Trust, P.O. Box 23567, Windhoek</td>
</tr>
<tr>
<td>Contact persons:</td>
<td>Janet Kaisuma and Nath Gwuseb</td>
</tr>
<tr>
<td>Contact address:</td>
<td>P.O. Box 1997, Windhoek</td>
</tr>
<tr>
<td>Project:</td>
<td>A study and exchange visit to observe community based tourism projects in north-western Botswana</td>
</tr>
<tr>
<td>Project period:</td>
<td>14 - 28 March 2003</td>
</tr>
<tr>
<td>Total funding:</td>
<td>Namibia $ 20,000</td>
</tr>
</tbody>
</table>

**Objectives:**

- To allow members of the Omulinga community to be exposed to the craft markets and community campsite projects in north-west Botswana.
- To allow participants to gain small business skills and a better awareness of tourism to apply when they return to Namibia.
- To encourage teamwork and build relations between the participants.
- To give participants the opportunity to travel to a new country.
The body of your document could contain the following sections:

1. Introduction and background (setting the scene)
2. Reason for conducting the trip (project rationales)
3. Participants and facilitators (how many people will be going)
4. Project framework (what are you planning to do)
5. Route and destination (where you are going)
6. Programme and itinerary (what you are planning to do there)
7. Expected outputs (what you will achieve)
8. Implementation plan (how you are going to carry out the trip)
9. Details of accommodation, food, transport and equipment needed
10. Beneficiaries (who will gain something from the trip)
11. Roles and responsibilities (who will be doing what)
12. Feedback after the trip (how participants will share their knowledge)
13. Evaluation (how to make sure you achieved what was planned)
14. Budget (how much money will the trip cost)

Tips

✓ Writing proposals for donor funding
Some donors have a particular layout for proposals. Enquire before submitting your proposal. It may save you having to do it again.

If possible, a community member or facilitator should deliver the proposal to explain the application for help. Write a clear covering letter to go with your proposal to each possible donor/funding source.
Chapter 3
Drawing up the budget

What finances are needed for the trip?
This is one of the most important parts of planning your trip. You will need to prepare a budget early on in the process, and include it in your proposal. Here are some tips for planning your budget. You will need to break it down into the different budget lines as laid out below. These may differ from trip to trip.

Travel costs
Vehicle running costs
Fuel costs: Work out how far you are planning to travel. Use a map to add up the distance and include extra kilometres for any tours or local driving.

Example:
You are planning a 1200 km round trip.
An average vehicle will travel about 10 km on 1 litre of fuel.
To travel 1200 km, you will need 1200 ÷ 10 = 120 litres of fuel.
If fuel costs N50 per litre, you will need:
N50 x 120 litres = N6000

- Remember this is your fuel cost for one vehicle.
  If you use two vehicles, the cost would be:
  N6000 x 2 = N12000.

Oil and repairs: This budget line will cover the other costs of running the vehicle. For instance you may need to repair a vehicle during the trip, replace a tyre or fill up with oil. Generally this will depend on the condition of the vehicles you are using. If they are in good condition you will need less, but be prepared for breakdowns.

Vehicle insurance: Be sure to find out what conditions apply to the insurance of the vehicle. Some insurance schemes only cover specified drivers. Others do not cover all damage to the vehicle. It is best to get at least temporary insurance cover for the trip.

Vehicle hire: You may need to budget for the hire of vehicles for your trip. Be sure to get a variety of quotations from different companies. Different options may apply such as limited or unlimited mileage, insurance etc. It is important to be clear on exactly what each quotation includes.
Air travel costs
If travelling by air, contact travel agents for quotations. Shop around, as prices will differ. Find out if any airlines will give your group a discount. Get accurate information about the inclusive prices of the tickets. Don’t forget to budget for airport tax and acquire the proper foreign currency to cover such taxes. You may also need to budget for the cost of hiring taxis, taking buses to and from the airport or hiring vehicles at your destination.

Food
Work out how much money you will need per person per day on average for food. Your total food cost will be the cost per person x number of people on trip x number of days on trip.

Example:
₦50 per person per day x 20 people = ₦1,000
₦1,000 x 10 days = ₦10,000 for food.
• This estimate of ₦50 per person per day is an average cost. Some meals may cost less, but some may cost more.

Accommodation
The cost of accommodation will depend on the type of trip. It may cost nothing if you are camping where there is no campsite. It may simply be the cost of campsites. If you are staying in booked accommodation (hostels, guest houses, bed and breakfasts, hotels) you could get different quotes for the best price and enquire about discounts for groups.

Per diems
This is a daily rate that the funding organisation may or may not provide to the participants. The rate would depend on which costs the participants themselves have to cover. For example, if your trip involves time in town or at a popular tourism destination, costs for participants will be higher. You would need advice regarding a suitable rate. If your budget does not allow for per diems, the participants should be clearly informed beforehand.

Example:
Per diems can be worked out on plus / minus 20% of the food and accommodation cost per person. If food and accommodation costs per person add up to a total of ₦100, the per diem could be
₦100 x 20% = ₦20 per person per day.
Other costs related to your trip
You would need to account for all additional costs. These may include:
- Visas
- Park entrance fees
- Medicines (anti-malarial tablets)
- Medical emergency insurance
- Permits
- Firewood
- Gifts for hosts

Contingency
This budget line could cover small costs not covered above e.g. camera film, batteries. On average your contingency amount is 10% of the total budget amount.

Tips

✓ Have a file for the trip
A lever arch file for the trip is a useful way of storing all information. Once the trip is over, all the final reports and documents can be filed and kept as a record of your trip. This can be a valuable source of information for planning another trip.

✓ Budget notes and totals
Your budget should have the total cost for each budget line. You may need to include notes at the bottom of the budget to explain how you worked out some of the costs.

✓ Petrol costs
Bear in mind the cost of petrol if you are travelling to another country, it may be higher than local petrol.

✓ Cash payments
You may also have to pay some costs (accommodation, airport tax) in foreign currency. You could check on this when getting quotes.
Chapter 4
The programme or itinerary

Where and when are you going and what are you going to do?

Where to go
Once the group has identified the purpose of the trip, local facilitators can help recommend the most suitable places to visit. This could include visiting groups such as communities, governments, NGOs or the private sector, either within the country or in neighbouring countries and beyond. Once identified, your hosts will be able to give further ideas and suggestions to help plan your trip as well as advise you on the best route to reach your destination. You may need to study maps of the area, or contact a travel agent for advice. Be clear on distances that you will travel and costs involved.

When to go
You could find out when people in the community you are visiting will be able to spend time with your group. Perhaps you would want to avoid travelling in the peak tourism season (which may be more expensive) or towards the end of the year. Also bear in mind weather conditions and avoid going when it may be very hot or very wet (rainy season). In most places the rainy season is also the main malaria season.

You may also need to plan your trip according to what you want to see and experience. For instance, some activities like crop planting, wildlife harvesting or trophy hunting may only take place at a certain time of year. You would need to plan your trip to coincide with the activities you want to experience. Your hosts will be able to advise you on many of these issues as well as the type of vehicles that will be suitable (either 2 x 4 or 4 x 4).

Contacting your hosts
It is best to start making arrangements with your hosts about six months in advance. (Keep a record in your file of names, addresses, phone and fax numbers). You should establish good contact with people who will be hosting your group and make plans and arrangements with them. Make sure that your proposed dates suit them.
- Do they have any recommendations about your programme?
- What can they offer?

Explain your programme, who your participants are, and what types of activities are particularly relevant to your group. Keep in contact and update them if there are any changes in your programme.
Length of trip
This will depend on many different things, for example, your budget, the size of group and how much you are planning to achieve. Less than four days or longer than twenty days is not recommended.

Learning experiences and free time
It is a good idea to keep your programme varied to mix learning experiences with fun experiences. A variety of learning methods should be used. These can include formal meetings, informal discussions, site visits or excursions. It is important to build in free time for the participants, depending on the length of your trip. You can work on a basis of one day off in every five days.

Tips

✓ Giving notice of your arrival
It is important to give plenty of notice to your hosts. They will have busy schedules and need to know well in advance when you are coming and what you want to do.

✓ Confirming arrangements
It is important that all the arrangements you make are given and later confirmed IN WRITING. This can be a letter, fax or e-mail. This will help you keep a record of what you have set up. File these and take them with you on the trip.

✓ Time management
Avoid travelling long distances and arriving in the dark at your destination. Keep your daily programmes focused and not too long.
Chapter 5
The participants

Who will be going on the trip?
Selecting participants
The participants need to cooperate with one another in attaining the goals of the trip. They would have to gather and share information, make decisions together and implement what they have learnt when they return.
The selection of participants may be done with the following questions in mind:
- Was the selection process fair?
- Were the appropriate people involved in selecting participants?
- Is there good representation of different groups, (men/women/young/old/language groups)?
- Were the participants selected in an open and transparent way?

Preparing participants
Participants should be given a list of what to bring on the trip. They should be clearly informed about travelling and accommodation conditions and per diems.

Numbers
Too large a group makes facilitation difficult. A recommended maximum is twenty participants. Too small a group is often uneconomical as the cost of the trip and the work involved should be maximised. A recommended minimum is ten participants.

Leadership
There may be a formally appointed facilitator for the trip, in which case a co-facilitator/leader can be appointed to assist with a big group. Or the community may appoint one or two members to take on the responsibility of leading the expedition. Different facilitators/leaders can have different roles and handle different aspects of the trip. If a joint decision needs to be made the facilitators/leaders should invite the group members to a discussion. Both participants and facilitators need to be aware of their roles and responsibilities to ensure that responsibilities are well spread and to enhance the capacity building of those that have never planned or conducted such trips.
Chapter 6
Money

Assuming that your budget has been approved and funds are available, the checklist below offers some points for consideration:

**If travelling within your country:**
- Do you need to draw all money in cash or are there banks where you are going?

**If travelling across international borders:**
- You need to order and carry foreign exchange.
- You need to break up your budget, for example, some cash in Rands/Namibian dollars; some cash in US dollars or other foreign currency; some travellers' cheques in foreign currency, (for example, 30% N$ cash, 10% US$ cash and 60% travellers' cheques)
- Are there banks where you are travelling?
- When are the banks open?
- Have you planned where and when to change money?
- Where will you get the best rate when changing your money? Remember that hotels and bureaux de change charge more than banks.
- Have some cash of the different currencies with you when you arrive in the foreign country. You may have to pay for permits, insurance or fuel, before you can reach a bank in that country.

**Banking**
Most banks will need 48 hours notice to issue travellers' cheques and foreign cash. Make sure you order your money well enough in advance. You will need to present your passport to collect the cheques or cash. It is a good idea to break your money down into useful denominations. This means you will have a different range of notes such as 200s, 100s, 50s, 20s and 10s. Remember when ordering travellers' cheques to do the same. Ask for a variety of different cheques. You may not always want or need to cash big amounts of money.
Slips
All money spent will need to be accounted for. Any purchase should have a recognised and acceptable receipt, and if money is issued to participants they must sign for it. Remember to get a bank receipt when changing money. Take along a zip up, plastic folder for storing your receipts.

Daily reconciliation
Whoever is responsible for the trip finances should do a daily reconciliation of what was spent and changed and what balance is remaining. If left longer than a day it is easy to forget things. A small notebook to record money spent is a good idea.

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
<th>Cost</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>27/8</td>
<td>20 x N$12 lunches</td>
<td>N$240</td>
<td>N$5260.00</td>
</tr>
<tr>
<td>27/8</td>
<td>20 x N$3 cooldrinks</td>
<td>N$60</td>
<td>N$5200.00</td>
</tr>
</tbody>
</table>

Safety
Remember - keep your money with you if it is not in a proper safe. It is best to have a money pouch strapped around your waist for the daily spending. Keep cash that is not immediately needed locked away in a cash box. Carry as little cash with you as possible. Keep money safe by giving half of the travellers' cheques (unsigned) to another facilitator or responsible group member. Remember to keep the receipt for the travellers' cheques in a different place to the cheques. If the cheques do get stolen, the receipt is your proof of purchase to claim back the stolen money.

Per diems
- Remember to draw enough cash at the beginning of the trip to issue per diems.
- You could issue half at the beginning of the trip and the rest halfway through the trip.
- Remember that people must sign for any money they receive – this will help you keep your accounts and will provide a record of the transaction.
Chapter 7
Accommodation

Where are you going to stay?
Depending on your budget and the type of trip you are conducting your accommodation needs may differ. If your budget allows, it is worth having a mix of camping and bungalow/hotel accommodation. Camping is the cheapest option but can become very tiresome on a long trip.

Here are some preparation hints:
• Where possible, stay in accommodation offered by the host community. This gives the participants more opportunities to interact with the hosts, and also benefits the hosts financially.
• It is important to get written/faxed quotations from a variety of different places.
• Find out about different options and their prices, such as single/double rooms, dormitories, bungalows and campsites.
• Make sure that accommodation is available on the required dates for the number of people in your group.
• If you are in doubt, make a provisional booking that you can cancel later.
• You may have to pay part of the accommodation in advance, to secure your booking.
• Find out whether you have to pay for the accommodation in any particular currency or cash so you can be prepared.
• Check how far the accommodation is from the centre of town, banks, shops and telephones.
• You may need to establish whether the accommodation has a safe or safety deposit box, laundry facilities, cooling facilities, safe parking, phone/fax/e-mail facilities, airport transfers, self-catering facilities, conference facilities.

Tips
✓ Bookings
Book all your accommodation in advance. It could happen that you arrive late with a tired group and find the place you wanted to stay in is fully booked.

✓ Discounts
Always ask if you could have a discount for a large booking or for paying in cash. Many places are prepared to do this, especially when they know the purpose of your visit.
Where and what are you going to eat?

If you are to be accommodated by the host community, you will need to check with them about catering arrangements. If the host community is catering, you will probably have to pay them in advance so that they can purchase the necessary groceries. You would need to find out their bank account details and make an electronic deposit. You would have to give clear guidelines about what sort of catering your budget can cover.

If you are doing a self-catering trip, your food plans will again be based on your budget and the type of trip you are planning. Food is a very important part of your trip. Hungry people are usually unhappy people. A basic rule is to make sure that people have enough food to eat, that the food is simple and is the type of food that people are used to. It is worth trying some of the local food if you are visiting a new area.

Planning your food

The simplest way to plan your food is to draw up a menu. The menu should be based on the following:

- the amount of money you have to spend
- the preferences of participants on the trip
- the available cooking facilities.

If you will be eating meals at hotels or in restaurants these meals can be slotted into your menu like any other meal. This will be the same if you are planning a take-away meal. While travelling by road, it may be easiest to use the eating facilities at the petrol stations, for example, Wimpy Bars.

<table>
<thead>
<tr>
<th>Day</th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Supper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>Rusks</td>
<td>Sausage rolls</td>
<td>Braai vleis</td>
</tr>
<tr>
<td></td>
<td>Tea/coffee</td>
<td>Apples, Fruit juice</td>
<td>Mealie meal, Sauce</td>
</tr>
<tr>
<td>Monday</td>
<td>Cornflakes</td>
<td>Fish sandwiches</td>
<td>Tuna sauce</td>
</tr>
<tr>
<td></td>
<td>Tea/coffee</td>
<td>Fruit, Juice</td>
<td>Pasta</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Oats Porridge</td>
<td>Egg salad rolls</td>
<td>Chicken stew</td>
</tr>
<tr>
<td></td>
<td>Tea/coffee</td>
<td>Crisps, Fruit juice</td>
<td>Rice</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Boiled egg and</td>
<td>Take away</td>
<td>Cheese</td>
</tr>
<tr>
<td></td>
<td>bread</td>
<td>(hamburger, chips</td>
<td>Rolls and salad</td>
</tr>
<tr>
<td></td>
<td>Tea/coffee</td>
<td>and coke)</td>
<td></td>
</tr>
</tbody>
</table>
Remember to plan for the following:

- Cater for people with allergies or special needs (diabetics or vegetarians).
- Take some snacks for during the day when people may get tired and hungry.
- Have water available at all times (A small water bottle for each person and a large one in each vehicle).
- Keep a nutritional balance in your menu: A mix of meat/eggs/fish, fresh fruit and vegetables and rice/potatoes/bread and mealie meal.
- If travelling to another country be sure you can afford to buy food there. Some places may be cheaper and others more expensive.
- If travelling across borders remember that in some places you may not be allowed to transport meat and other fresh goods across borders – always check first. Baskets and wooden crafts may need special permits too.

Cooking

If your group is self-catering at any time, it is worth setting up a cooking and washing-up roster. This means that all the group members are involved and it avoids the problem of having to ask for volunteers. When serving up food at meal times have someone who oversees or serves up the food. This will avoid some people serving themselves too much food while others go hungry.

Cleaning

Remember to take enough washing up liquid for your trip. You may also want to take some washing powder and bleach for cleaning and washing your cloths and dishtowels.

Quantities for catering

When deciding what to buy it is easiest to estimate how much food you will need for each meal before you go shopping.

Here are some examples:
- Pasta/macaroni x 500g = 4 people
- Mealie meal x 1kg = 5 people
- Tinned meat x 300g = 2 people
- Loaf of bread = 4 slices per person per meal = 5 people
Tips

✓ Drinks
If you are eating in a restaurant or a take-away shop you could give the group the option of one cool drink at a set price to be covered by the budget, after which any other drinks should be covered by participants themselves.

✓ Set menus
Again to make budgeting easier, if eating out you can select items on the menu that are within the budget and advise participants of what their choices can be.

✓ Self catering
If you are self-catering, you could use the equipment checklist (section 1 chapter 11) to help you plan what you need to take with you.

✓ Late meals
If you know you will arrive somewhere late at night, plan a simple uncooked meal. It is better to be able to feed everyone quickly and easily in these situations.

✓ Alcohol
Most donors do not involve allow for the purchase of alcoholic drinks with their funds. Make sure that participants are well aware that they may need to pay for alcohol out of their own pockets.
Chapter 9
Transport

How are you going to get around?
You may have enough money to fly to your destination or you may be driving.

If travelling across borders make sure that everyone has correct travel documents.
(See Appendix 2 for SADC border requirements)

If travelling by air check the following before leaving:
• Are all the flights confirmed and leaving on time?
• Do you have transport to the airport?
• Do you have transport when you arrive at your destination?
• Are the participants within the baggage allowance?
• Explain that each participant is responsible for the contents of their luggage.
• Make sure everyone is clear on regulations about firearms, drugs and hand luggage restrictions.
• Do you have your airport tax ready in the correct currency (CASH)?

If travelling by vehicle check the following before leaving:
• Do you have enough vehicles and drivers for the trip?
• Will the participants be comfortable in the vehicles available?
• Are the vehicles in a good road-worthy condition?
• Have the vehicles been serviced recently? If not, get them serviced.
• Does each vehicle have the correct equipment?
• Do you have a first aid kit?
• Are all the vehicles correctly licensed?
• Do you need to have a letter for trip authority before you leave?
• Do you need police clearance for entering other countries?
• Are all the vehicles insured?
• Who will check the cars mechanically before you leave?
• If using a trailer is it in good condition and properly equipped?
• Do you need to carry extra fuel cans with you?
• How many people is each vehicle licensed to carry?
• Do you have enough space for: - people
• - luggage
• - equipment
• - food
• - extra fuel (jerry cans)?
On the road
Before leaving let the participants know what you expect from them whilst travelling. This might include:
• No drinking of alcohol (or smoking) in the vehicles.
• Keeping the cars clean and tidy.
• No request to the drivers for personal trips or stops (shopping, visiting).
• Request to stop when needed (for toilets).
• No lifting of hikers.

Drivers
Remember the following:
• All your drivers should possess valid licenses.
• Give each driver his/her own route map.
• Discuss daily as a group where you are going.
• Make any new or different traffic rules known to all the drivers.
• Set a safe travelling speed, and a safe following distance.
• Always keep the vehicles behind you in sight, or wait for them periodically. Otherwise they may break down or get lost without anyone realising. Re-group at important junctions.
• Be sure each driver is aware of his/her rights and duties when responsible for a vehicle.
• Drivers should not travel in one another's dust on dirt roads.

Tips
✓ Breakdowns
Ensure the group travels together. If one car breaks down all the vehicles should stop together while drivers and facilitators decide what to do next.

✓ Pit stops
It is a good idea to have regular stops when travelling long distances. This allows people to stretch their legs, go to the toilet or have a drink. Remind each driver to check that all the passengers are on board before leaving again!

✓ Maps
Provide all the participants with route maps and explain where you are travelling every day. People often feel disoriented in new places and will be much happier if they know where they are going and how long it will take.

✓ Equipment checklist
You can use the vehicle equipment checklist (in Section 1 Chapter 11) to help you plan what you need to take with you.
Chapter 10
Health and emergencies

Are you prepared for an accident, illness or emergency?
While you are travelling, you need to be prepared for the unexpected to happen.

Do you need to take any precautions for the area you are travelling to?
In some countries your participants may be required to have had vaccinations against cholera/polio/yellow fever, hepatitis A and B, tetanus and other diseases. Make sure to check what you need and arrange for immunisation well in advance. (See Appendix 2 for SADC border requirements)

Malaria
Probably most important in Southern Africa is to find out if your group needs to take precautions against MALARIA. If they do, find out from a doctor or someone informed from that area which tablets your group should be taking. If your group does need protection, make sure you budget for tablets and that people are aware of the risk before you go. Remember to find out how soon before entering the malaria area your group needs to start taking their tablets.

First Aid
Be sure, especially if you are travelling by road, to have a good first aid kit. If you need to buy a first aid kit avoid buying a ready-made kit at the chemist. They tend to be very expensive and don’t contain a wide enough range of medicines. Instead, ask a pharmacist to help you to select the medicines and equipment you will need for your trip, based on where you are going. Remember to ask for a discount. (See checklist in section 1 chapter 11)

Select a trip “nurse”
The participants could select a member of the group who may have some medical experience or who is able to take responsibility for the first aid kit and medicines. This person could be responsible for reminding the group daily about taking their malaria tablets, helping people with complaints and replacing used medicines.

Special needs or health problems
Find out in advance if anyone in the group has any allergies or medical complaints such as diabetes, asthma, high blood pressure and epilepsy. Find out if they carry medication with them and how to help them if they get sick.
Pregnant women
Make sure you are aware if anyone in the group is pregnant. This is very important in the case of entering a malaria area. The pregnant women must know the risks they could be taking. If they are not sure whether to travel or not, seek advice from a doctor.

HIV/Aids
Before leaving discuss the issue of HIV/Aids with the group, or invite someone knowledgeable to speak to your participants about the risks and how to protect themselves against infection. You could carry a large box of condoms and decide with the participants how people can have access to them.

Insurance or medical rescue
If you are travelling a long distance by car you can take out temporary insurance that will cover your group for the duration of the trip. This means that if you have an accident, people can be transported to the nearest hospital. Ensure that people know what the insurance covers. These policies are available from most medical aid companies, but get different quotes as the prices vary. Netcare 911 is a widely used service in southern Africa that ensures rescue from an accident scene and transport to health facilities.

Tips

✔ Carry gloves
It is a good idea to carry at least two pairs of surgical rubber gloves in each vehicle. They must be new and unused. If you have to handle someone who is bleeding use the gloves to prevent the possible spread of HIV/Aids and other diseases. Make sure all the participants know where the gloves are and what they are for.

✔ Buying medicines
If you buy medicines at a chemist, ask the pharmacist to show you which "generic medicines" to buy. These are cheaper versions of well-known medicines but contain exactly the same ingredients. They are cheaper because they do not have the well-known brand name. You can save up to half the amount of money by buying generics that are exactly the same medicine.

✔ Emergency fund
It is a good idea to keep aside an amount of cash in your budget for an emergency. This may cover mechanical breakdowns or personal injury and healthcare.
Chapter 11
Equipment

What do you need to take with you?
This chapter contains various checklists for different types of equipment.

Vehicle equipment
✓ Tyre pump
✓ Jack
✓ Tyre lever
✓ Wheel spanner (for cars and trailer)
✓ Spare tubes
✓ Spare tyre(s)
✓ Patches
✓ Solution
✓ Tubeless tyre repair kit
✓ Spare fuses
✓ Spanners
✓ Vice grips
✓ Emergency triangles
✓ Insulation tape
✓ Water containers
✓ First aid
✓ Spare oil
✓ Brake and clutch fluid
✓ Tow rope
✓ Wire
✓ Jump cables
✓ Toolbox
✓ Jerry cans

Cooking equipment
✓ Pots
✓ Kettle
✓ Braai grid
✓ Cool boxes
✓ Plates
✓ Cups
✓ Knives
✓ Forks
✓ Spoons
✓ Sharp knives
✓ Chopping board
✓ Tin opener
✓ Serving spoons
✓ Braai tongs/fork
✓ Cheese grater
✓ Clothes
✓ Scourers
✓ Dish towels
✓ Washing powder
✓ Washing up liquid
✓ Sieve
✓ Bin bags
✓ Washing up bowl

General equipment
✓ Flipchart stand
✓ Flipchart paper
✓ Notebooks
✓ Pens
✓ Maps
✓ Folders
✓ Radio
✓ Bath soap
✓ Clothes washing powder
✓ Invoice book
✓ Calculator
✓ Car registration documents
✓ Camera
✓ Film (slides and prints)
✓ Project information
✓ Photos
✓ Reports
✓ Hand-outs
✓ Community profile
Camping Equipment
- Tents
- Mattresses
- Bedding (sleeping bags)
- Mosquito nets
- Stools
- Ground sails
- Spade
- Buckets
- Washing bowls
- Fridge
- Cooler boxes
- Camping table
- Gas bottle & ring
- Gas lamp
- Dustpan & broom
- Broom
- Torches

First Aid equipment
- Bandages
- Plasters
- Cotton wool
- Gauze bandages
- antiseptic ointment
- Wounds and burns - bandages
- gelonet
- mechurochrome
- burn salve
- Medicine for:
  - eyes - drops/ointment
  - ears - drops/ointment
  - flu/colds - cough mixture
  - pain - aspirin/
  - paracetamol
  - allergies - phenergan tablets
  - antihisian cream
  - diarrhoea and vomiting
  - constipation - enos
  - fevers
  - toothache
- Calamine Lotion
- Savlon
- Deep Heat/Reprage
- Condoms
- Medical equipment - splints
- small scissors
- tweezers
- safety pins
- latex gloves
- needles
- syringes

Tips
✓ Equipment condition
Before you leave make sure that all the equipment is in good working order and that it is complete. It is easy to take a tent and leave the poles behind. This is also important if you are borrowing or hiring equipment that may not be in good working condition when you receive it. If this happens point it out to the owner before you take it.
Chapter 12
Trip formalities

What are the official requirements for the trip?
Whether travelling nationally or across borders there will be some formalities that you need to be prepared for.

Leave and official permission
Some participants may have to take formal leave from work to join the trip. They may require a letter of support from the trip facilitator explaining why they will be away and for how long. Make sure this is arranged at least six weeks before you leave.

Trip authority
It may be necessary to get trip authority for the vehicles being used on a trip. It is also worth having letters of authority for vehicles should you need them at any time on the trip. Drivers should be covered in these letters as having permission to drive the vehicles.

Police clearance for vehicles
Check well in advance with the police whether you need police clearance when travelling out of the country. If you do, set aside plenty of time to process the permits (the vehicles will have to be inspected) and keep some money aside in your budget to pay for the certificates.

Passports (See Appendix 2 for SADC border requirements)
As soon as the participants have been selected, ensure that they all have valid passports well in advance. This includes checking that no passports will expire while you are away. For those that do not have passports or need renewals, begin organising this at least three months before you leave. Remember those applying will need passport photographs which you may need to arrange.

Visas
If visas are required, these may take time to process, so plan for this well beforehand. Ensure that you have budgeted to cover the costs of visas.

Health documents
Some countries require people to have proof of immunisation for a number of diseases. The required vaccinations can usually be obtained at government clinics and the proof is stamped inside a small “passport”. Some of these may only be available at clinics in larger towns.
Letters of support
It is a good idea to have a letter of support from the head of your organisation or from the donor. It is also worth getting a letter of support for your trip from a director or permanent secretary of the relevant government ministry. You could also arrange a letter of support from the organisation or people that will be hosting you when you arrive in another country.

Insurance
Some countries require proof of the insurance on any vehicle (and trailers) that you are travelling in. If you cannot produce the documents you might be forced to buy insurance at the border which could be expensive. Remember to take your insurance documents with you on the trip.

Taxes and import duties
Unexpected duties and taxes might crop up. Be prepared by having some foreign exchange (US dollars or British pounds) with you.

Tips

✓ Safety
It is a good idea to keep all your official documents in a waterproof/plastic folder with your trip file. This will avoid documents getting damaged, wet or dirty.

✓ Border crossings
When crossing through border posts ask some participants to help others fill out forms and get organised. Some of the group may be experienced while others are doing this for the first time. The facilitator or group leader should be first through the checkpoints to explain where your group is going and why.

✓ Emergency travel documents
Participants who do not possess travel documents could apply for emergency travel documents that can be processed in just two or three days.
Section 2

Conducting ... during the trip

This section of the manual covers the different things you can do during the trip.

These are:

1. Preparation and briefing
2. Daily planning and evaluation
3. Meetings, visits and appointments
Chapter 1
Preparation and briefing

Sharing the objectives of the trip
Before leaving on the trip, all the participants should get together for a preparatory meeting or workshop so that everyone begins the trip with the same ideas about what will happen and what can be expected. Such a workshop can establish a common knowledge base about the community, clarify the tasks of the group, help members to improve their facilitation skills and establish a team contract. The contract can be used as a behavioural protocol.

This is a good time to go over the objectives and aims of the trip, to clarify the programme/itinerary, and to finalise all travel and health arrangements.

Expectations:
Cover the participants’ expectations of the trip and the facilitators’ expectations of the participants. Also be sure to cover what is expected of the facilitators/leaders and the participants when they return from the trip.

Norms:
Establish some basic norms/ground rules as a group. This may cover issues such as:  
- which languages will be used
- being on time
- respecting one another’s views and culture
- remembering that any question is a good question
- encouraging teamwork and co-operation
- being flexible to change
- accepting “no” as an answer at times
- encouraging participation by all members of the group (often there are quiet participants on the trip who may need this encouragement)

Facilitators/group leaders
It is important to clarify the different roles of the facilitator(s) and group leaders. Different representatives of the group may be chosen to keep good communication between the participants and group facilitators/leaders.
Roles and responsibilities
This is the best time to divide up the different chores and work. These can include driving, cooking, washing up, putting up tents, equipment checking, filling water containers, first aid and medicines, packing and unpacking cars, payments and appointments, security, introducing the group, thanking hosts, timekeeping, note taking and report writing.

Indemnity/disclaimer
Do participants know that if they get into trouble by breaking the law you will not be responsible for them? Emphasise issues such as carrying and using drugs, firearms and changing money on the black market.

Health issues
Discuss where the first-aid kit will be kept and who will be responsible for it. Make sure participants are aware of HIV/Aids risks, as well as the precautions they could take.

Concerns and questions
Spend some time on any worries or questions the participants have. You can discuss the conditions they are likely to experience, such as the weather and the social environment. You can also point out that you will have time during the trip for further discussion.

Money
You could discuss security and the payment of per diems at this point.

Useful equipment
Give out any useful equipment you have for the participants. This could include:
- maps
- copy of the programme/itinerary
- pens
- hardcover notebook (A6)
- folder/file for papers and handouts

Remember to check that everyone has their passports or identity documents, tickets and health immunisation documents BEFORE leaving.
The Ehi-rovipuka (Namibia) Conservancy Committee had a planning meeting before their departure for Botswana. The purpose of the meeting was aimed at capturing participants' expectations, discussing trip objectives, working out their roles and house rules.

**Roles and responsibilities for the exchange visit to Botswana (June 2002):**

<table>
<thead>
<tr>
<th>ACTIVITIES FOR THE EXCHANGE VISIT</th>
<th>RESPONSIBLE FACILITATOR</th>
<th>COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms completed and travel documents obtained</td>
<td>AH</td>
<td>21/05/2002</td>
</tr>
<tr>
<td>Funding proposal finalised and funds obtained</td>
<td>AH, FS</td>
<td>First week May</td>
</tr>
<tr>
<td>Made appointment and all arrangement of the trip</td>
<td>FS, RT</td>
<td>Jan - May</td>
</tr>
<tr>
<td>Organize vehicles and equipment</td>
<td>AH, FS</td>
<td></td>
</tr>
<tr>
<td>Handling the budget and payments (Drivers will be responsible petrol money)</td>
<td>AH</td>
<td></td>
</tr>
<tr>
<td>Buy medicines</td>
<td>AH</td>
<td>26/05</td>
</tr>
<tr>
<td>Food for the trip</td>
<td>FS (AM)</td>
<td>31/05</td>
</tr>
<tr>
<td>Complete what to bring list and send it to participants</td>
<td>AH</td>
<td>12/05</td>
</tr>
<tr>
<td>Make sure the planning workshop is done before departure</td>
<td>KTT</td>
<td>1/06</td>
</tr>
<tr>
<td>Compile the diary for facilitators and participants (record keeping)</td>
<td>AH, RT</td>
<td>27-30/05</td>
</tr>
<tr>
<td>Organize the stationery for participants</td>
<td>AH</td>
<td>29/05</td>
</tr>
<tr>
<td>Introducing the group</td>
<td>FS, AH, KTT,RT</td>
<td>Every day</td>
</tr>
<tr>
<td>Thanking hosts</td>
<td>All</td>
<td>Every day</td>
</tr>
<tr>
<td>Note taking</td>
<td>Every body</td>
<td>Every day</td>
</tr>
<tr>
<td>Final report and financial reconciliation</td>
<td>AH</td>
<td>23/06 - 1st draft 30/06 - final</td>
</tr>
</tbody>
</table>
Chapter 2
Daily planning and evaluation

How do we plan and reflect during the trip?
During the trip you will need to hold various planning, reflection and evaluation meetings. Some of these may take place every day and others every second day.

Daily briefing
At the start of each day the group can discuss the programme for the day. This is also a good time for the facilitator/leader or the participants to ask questions and raise any concerns or worries.

Daily evaluation/reflection
During the trip it is important to keep track of what the group is learning and how they are finding the programme. This can be done daily or every second day. Such meetings should cover what the group has learnt that day (or the previous day) and what their opinions or reflections are on the experiences they are having.

Different group members could facilitate or co-facilitate a session each day. This evaluation is important, as it requires the group to think again about what they are seeing, hearing and experiencing.

There are many different ways of evaluating what people have experienced. For example each participant could answer the following questions in relation to each trip objective:

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>What was good and why?</td>
</tr>
<tr>
<td>What was not good and why?</td>
</tr>
<tr>
<td>What recommendations or suggestions do you have?</td>
</tr>
<tr>
<td>How do these experiences relate to our programme?</td>
</tr>
</tbody>
</table>

Participants can think about their answers and then share with the whole group. Someone can record each day’s work, which will be useful for the final evaluation and trip report.

Requests, concerns and conflict
It is important to make sure that issues are fully dealt with and resolved. Some problems may be better handled by a smaller group, rather than involving all the participants in a difficult situation.
After all the preparation, the exchange visits in 2001 were the highlight of the process for the Suid Bokkeveld community:

Two different groups made two journeys:

- The first was a five-day trip to Namaqualand to explore community-based eco-tourism. The group visited Paulshoek, Ecksteenfontein, Khoebes, Sendelingsdrift, Lekkersing, Port Nolloth and Pella.
- The second was a two-day weekend journey to Wupperthal and Graafwater to gain insight into rooibos tea production and marketing.

The travellers found the shared journey to new places very stimulating. They enjoyed the rich experiences of getting to know people who share similar challenges and aspirations, and learning about what they have done. However, the facilitation team was aware that a journey to a strange place can be disorienting and distressing. We therefore made sure that the travellers shared a strong sense of responsibility for the journey, and were consciously co-directing it (and not just being passively taken from place to place). A written programme was prepared, as well as documentation of the preparatory processes.

After the travellers had set out on the journey, and the stress of the last minute domestic preparations had been left behind, we stopped for a briefing session. We reviewed the programme, the team contract, and the roles (such as rapporteur) that had been accepted by individuals. This small but important step enabled the participants to address any doubts or questions, and to focus on the purpose and process of the journey.

We followed a similar process in all of the communities visited. After arrival and initial introductions, we organised workshops so that the travellers and members of the host community could talk about local initiatives in a focused manner. This was supplemented by smaller group interactions to learn more about the local initiatives.

While the programme served to guide the process, the visits evolved in response to unpredicted opportunities and meetings. At one stage the group was invited to join a workshop that was taking place to preserve the local indigenous language (the lost language of some of the hosts’ forefathers, which most of the travelling group had never heard, and were very curious about). At another, the group enjoyed a detour to listen to local musicians. At each stop on the journey, the group took time before leaving to reflect on what they had learned. They also held farewell ceremonies to express thanks, and to exchange contact details so that they could network in the future. The small gifts that people from the Suid Bokkeveld gave to their hosts made a huge impression: tea that they had grown and made themselves, flowers from their unique eco-systems and hand-made brooms were greatly appreciated.

After each stage of the journey the participants evaluated and shared their reflections while the impressions of the visit were still fresh.
Chapter 3
Meetings, visits and appointments

Preparing to meet your hosts
Your programme will include meetings and appointments with various people. It is worth being prepared for the different aspects of each part of your programme. For instance:

Introductions
The group could nominate a spokesperson to present a general background of the trip and introduce the participants. Guidelines about what should be included, the length and any special emphasis, can be discussed beforehand.

Thanking
Again a member of the group can be chosen in advance to give a vote of thanks on behalf of the group. A gift may also be presented to the hosts.

Notes and minutes
All the participants should be keeping their own notes during the trip. Different people can minute different meetings to ensure an accurate record of what was discussed.

Questions
During the daily briefing the participants could prepare or think about any questions they may have for their hosts. It is very discouraging for the hosts if participants do not ask any questions or show any interest in what is being discussed. Encourage the group to ask questions or make any comments. Help quiet members of the group to ask questions.

Tip
✓ Participation
The different tasks such as introduction, giving background and thanking are all good training and confidence building opportunities. It is important to make sure that all the participants take turns and gain experience. This is not only fair but also means that the more shy/quiet and more lazy members of the group are encouraged to participate.
Section 3
Follow through ... after the trip

This section of the manual has been split into the different aspects that the facilitator and participants can plan and do once the trip is completed.

These are:
1. Final evaluation and planning workshop
2. Trip reports
3. Financial reports and reconciliation
4. Thank you letters
5. Tidying up and packing away
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Chapter 1
Final evaluation and planning workshop

How will you make sure that important learning is turned into action?
The last part is very important and yet can be most difficult. Often participants are tired, wanting to get home and already thinking about other things. This part of the trip requires careful planning and a great deal of energy from facilitators and participants.

In Section 1, Chapter 4 “The Programme or Itinerary”, we discussed building time in to hold a final evaluation of the trip. This evaluation allows the participants and facilitators to reflect on their learning experiences and plan ahead for follow through activities. This is one of the most important aspects of the trip, for without reflection and planning to implement new ideas or vision, the lessons of the trip may never be shared or implemented.

Ideas for the final evaluation and planning meeting
Firstly remember to build at least one day into the programme for this important activity.

Venue
If your participants are from different geographic areas, it is a good idea to hold this meeting at a neutral venue (i.e. not anyone’s home town, farm or village) so that you can keep the concentration of the participants to finish off their work as a focused group. You may plan to hold a further series of report back meetings once the participants have returned home to share their experiences.

Choose a venue with enough space and light to accommodate the group. You may need to budget for the hire of the venue when planning.

Materials
When planning your trip, remember to take along extra marker pens, flipchart paper, note paper, prestik and coloured cards to use during this session.
Meeting Agenda
There are a number of possibilities here. It is a good idea to link your final evaluation to the way that you conducted the evaluation and reflection sessions during your trip. Key issues that arose during the trip would have been noted by the facilitators and could be revisited during the workshop.

**Step one: Purpose of the meeting**

<table>
<thead>
<tr>
<th>Example agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step one: Purpose of the meeting</td>
</tr>
<tr>
<td>Step two: Key activities or learning themes of the trip</td>
</tr>
<tr>
<td>Step three: Putting learning into action</td>
</tr>
</tbody>
</table>

You could begin by exploring the purpose of the meeting with the group and setting the goals and outputs for the meeting together. For example the purpose of the meeting could be ...

"To highlight the insights that we gained that are appropriate to our situation."

"To decide what we will do over the short, medium and long term to implement what we learnt."

**Step two: Key activities or learning themes of the trip**

During this step, the participants could work in small groups or individually to think about the key learning points of the trip. They could work through a short series of questions (see below). They could reflect on their experiences during the trip while answering the questions. Any answer should be accepted as a valid one.

Key themes or activities: The questions may be focused on particular activities or thematic aspects of the trip. For example, if one of the key aspects of the trip was to look at marketing a particular product you could use “Marketing” as a sub heading. Do not focus on specific activities such as “Visit to Gokwe paper making project”.

Select the key themes or activities with the participants. Be careful not to choose too many and get bogged down. Rather stick to the most important and relevant ones. You could begin by briefly working through the trip programme to remind everyone where you went and what you did.

**Questions:** Once you have the key activities or themes selected you could work through them asking the following questions:

- What was good or interesting about this activity/theme?
- What was not good – or weaknesses that we should avoid?
- What are the possible opportunities we found?
- What are the possible threats that we may be able to avoid?
**Flipchart paper and cards:** The groups or individuals could either write their answers on flipchart sheets or on coloured cards if you have them. Using cards allows the facilitator to group similar answers and see the level of common thinking and learning amongst the group members. Cards also allow the quiet or shy members of the group to participate without having to speak in front of the group. Cards also allow people to record learning or experiences that may have been difficult or uncomfortable to say out aloud. Remember to ask the participants to write one idea per card.

**Recording key issues:** Capture points from cards or flipcharts by grouping or rewriting key issues on the flipchart. See where things can be put together to reflect a common lesson learned. Group members need to go through the key lessons and observations to see if they agree, have any questions or want to add anything else. Remember to capture any recommendations that group members or co-facilitators may have made.

**Step three: Putting learning into action**

It is extremely important to consider and plan how the participants are going to take their learning forward in the future. There are a number of ways to do this. It is important to encourage the group to explore the most relevant and applicable way for their local situation. Some of the options could include:

**Feedback meetings and workshops:** Participants can decide who and how they will give feedback to those that did not go on the trip (including community members, local government partners, traditional leaders). Feedback could be done through a meeting, workshop, and newsletter. Any photographs, slides or video footage of the trip could be used as material to liven up presentations and give a first hand view of what happened. These meetings should be used to discuss plans, new visions and ideas for the future.

**Build plans into local planning opportunities:** Where local planning forums are in place, encourage participants to use these platforms to integrate their learning and their ideas into what is already happening in their area and to gain the agreement and buy-in of other community members into their vision. These could be platforms such as quarterly planning meetings, CBO committee meetings and village meetings.

**Revisiting and evaluating our plans:** Set a date for participants to return to their plans, see how they have changed and evaluate how the implementation of the plans is going, and decide what further action to take.
Tips

✓ **Choosing a co-facilitator**
You may find it useful to ask a member of the group to work with you through the evaluation session.

✓ **Quiet participants**
Using cards can help to draw out quiet participants and encourage them to give their input. Make a point of allowing them the chance to contribute without pressurising them.

✓ **Participants that cannot write**
Remember that there may be members of the group who cannot read or write. Assist if you are able or ask an active group member to help out.

✓ **Be open to criticism**
There may be negative points or criticism that comes out of the evaluation. Address issues in a constructive way and do not allow your response to take the meeting off track.
Here is an example of the report-back workshop of the Suid Bokkeveld community exchange visit:

Report-back workshops in Suid Bokkeveld in 2001
Following the exchange visits, the experiences and insights were shared at workshops with those who were unable to undertake the journeys. Not only did participants report back verbally on what they had seen, heard and learned, but video and photographic material also brought the visits to life. This led to very animated discussions. Interest groups were formed at these workshops, and their next steps were identified. It was clear that it would be up to the interest groups to drive the process forward, together with limited support from the development agencies.

Supporting emerging community-driven initiatives
- The exchange visits ended on a high note. Some individuals and groups were very enthusiastic about new undertakings. Our approach as outside development support agencies was to commit to support these within our capacities, if asked to do so. However, we made it clear that we were not willing or able to be the driving force.
- The initial decision to form a rooibos producer organisation was taken at a stop on the way back from the exchange visit. People were so impressed by the Wupperthal experience that they were impatient to get their own organisation formed as soon as possible. EMG provided facilitation support to enable the interested producers to explore the legal options for establishing a joint business.
- Training and capacity development was important at this stage of the process. Over the next few months members were assisted in drawing up a business plan. Training was provided to the Co-op’s Treasurer to enable him to keep a set of books. Organisational development training supported the Co-op in running effective meetings, and defining the role of the office bearers. Evaluation became a standard practice at the end of meetings or larger undertakings.
- The Canadian Embassy provided funding with which the Co-op purchased tea-making equipment, and plans to start building a facility. Contacts were made with prospective buyers, and all of the members registered as organic producers. By February 2001 the Heveld Small Growers Co-operative was making its own tea on facilities rented from a neighbouring large scale farmer. With support from UNEP, the Heveld trademark was registered, packaging was developed and a promotional booklet published.
- While most of the tea is exported in bulk, some is packed in cloth bags for sale on the local and export markets. The members of three women’s groups make the bags in the community. They have all been trained in the use of hand-powered sewing machines to produce the bags, and are able to work at home to supplement their incomes.
- At the same time, a group of women from Mulkraal decided to establish a small tourist facility. The Rietjieshuis was built using their own imagination, skills, labour and resources. They offer visitors traditional food and hospitality, as well as a chance to learn about the local culture and environment.
Chapter 2
Trip reports

Who should give reports?
It is important to decide who needs to be accountable for the trip and to whom they should report. Usually the donor or sponsor will require a written report. Make sure that if any participants are expected to give a report that they are aware of this from the beginning of the trip.

Reports can be given orally as a presentation or can be written. In Chapter 1 we covered report back meetings and workshops. Materials from the trip can be used to assist in making the presentation colourful and interesting. These materials could include, photographs, slides, video footage, posters, documents or any other interesting objects kept by participants.

Written reports
A written report should be carefully designed to give the reader the information they require. If the facilitator requests written reports from the participants it must be clear why they are needed and what information they should contain.

The facilitators report should also be carefully thought out and broken down into clear sections. Generally the report should cover the following sections unless a format has already been supplied. You may want to add extra sections that are relevant.
The report layout could look something like this:

**Introduction and background**
How did the idea begin?

**Aims (objectives) and expectations of the trip**
What was the real purpose of the trip? What were the expectations of the participants and facilitators at the beginning of the trip?

**The participants**
Who attended and why? (A list of participants' names can be supplied as an appendix)

**Trip implementation**
What was the itinerary? What activities were undertaken on the trip?

**Evaluation and lessons learnt**
What were the key observations and lessons learned? Provide a summary of the key issues. A full record of the evaluation could be attached as an appendix.

**Follow up and next steps**
What activities have been planned? Give a description of how the lessons and plans are going to be put into action.

**Recommendations**
It is useful to include any recommendations that you, your hosts, co-facilitators and participants may have. These recommendations can guide other facilitators or groups hosting similar visits. Remember that often the small details have a large impact and any lessons you have learned or ideas on how things can be done differently will be very valuable. These should have also been captured during your evaluation and planning workshop.

**Conclusion**
Do you need to give any special thanks or credit? What is the final overall result of the trip?

**Appendices**
Do you need to attach any additional information?
Possible appendices include:
- List of acronyms and abbreviations
- Financial report
- List of participants
- Itinerary of trip
- Map of route taken
- List of materials collected
- Pictures
- Contact details of participants and hosts
Tips

☑ Be sure to send a copy of your report to all the important stakeholders from your trip. These would include:
   ◇ Donors
   ◇ Hosts or groups that you visited
   ◇ Participant groups
   ◇ Local officials
   ◇ Partner organisations.

☑ Other facilitators or groups planning a trip may find your report a useful resource so consider sending them a copy too.

☑ Remember to keep a copy of your report on file for future reference.
Chapter 3
Financial reports and reconciliation

At the end of the trip, once all the expenses are complete and no further payments need to be made, reconcile your finances and prepare a financial report.

The financial report needs to be related to the budget you prepared for the trip. In Section 1 Chapter 6 “Money” we discussed how to manage money during the trip. For every transaction you make, a record should have been kept. These records could be a shop till receipt, bank receipt or a handwritten record. If you kept a daily record of your expenses and reconciled (balanced) your money every day, compiling the final report will be much easier.

How do I start the financial report?
A sample of a financial report has been provided below. Before you begin to fill it in there are several important steps to follow.

- Preparing the slips
Now that all the transactions are over, go through your slips and record book, which should still be kept in daily order. Sort through all the slips in the same currency and sort the slips into the different budget lines you used in the budget.

For each bundle of slips do the following:
- Sort all slips and arrange according to date
- Give each slip a number

If you were working in different currencies, keep the slips in different currencies separate. The reason for doing this is to make it easier to add up the total amounts spent in each currency (e.g. how much did you spend in Rands and how much in Pula?) A separate report sheet should be filled in for each different type of currency.

- Filling in the financial report sheet
Remember to use a separate report sheet and compile a separate report for money if there are different currencies. Begin by filling in the information at the top of the sheet.

Trip title: the trip or project name?
Date: the date this report was prepared
Prepared by: the name of the person who compiles the report
Currency: in what currency was the money recorded on this sheet?

Then fill in every slip on the sheet working through the different budget categories:

Date: record the date on each slip here
Receipt number: the number you have written on each slip
Description: record the details of the transaction.
Income: Record all income here for the currency you are using.

Expenditure: Fill in the amount of each expense which you record in the appropriate column.

Balance: This must be calculated after every transaction recorded, i.e. take the balance before the transaction and add income or subtract expenditure depending on the transaction.

Totals: Add all the figures in each column. This gives you the total expenditure for each budget line for the currency you are working in.

**Balance check:**
- Total A - Using the last row of the sheet enter the total income amount in A
- Total B - Add up all the expenditure totals to give a grant total of expenditure and enter amount in B
- Balance C - Double check your balance by subtracting the amount in B (total expenditure) from A (total income). This figure should be exactly the same as your final balance figure above.

**How do I compile the financial reconciliation?**

Once you have completed the financial report sheets these can be used to finalise your finances and complete the financial reconciliation.

- **Filling in the financial reconciliation sheet**

Begin by filling in the information at the top of the sheet.

**Trip title:** the trip or project name?

**Date:** the date this report was prepared

**Prepared by:** the name of the person who compiles the report

**Budget category:** fill in each different budget category/line that you used in your financial report sheet (which should be the same as the original budget)

---

**FINANCIAL REPORT**

**OMPO CONSERVANCY EXCHANGE VISIT TO ZIMBABWE**

<table>
<thead>
<tr>
<th>Date</th>
<th>Receipt number</th>
<th>Description</th>
<th>Income</th>
<th>Expenditure</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Per diem</td>
<td>Food &amp; Accum.</td>
<td>Fuel</td>
</tr>
<tr>
<td>1/9</td>
<td></td>
<td>Cash from donor</td>
<td>10 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/9</td>
<td>1</td>
<td>Greg's Garage - Spare parts</td>
<td></td>
<td>250.00</td>
<td></td>
</tr>
<tr>
<td>2/9</td>
<td>2</td>
<td>Highway motors - fuel</td>
<td></td>
<td>450.00</td>
<td></td>
</tr>
<tr>
<td>3/9</td>
<td>3-12</td>
<td>Per diem for participants</td>
<td>600.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4/9</td>
<td>13</td>
<td>Eastrand Shell</td>
<td></td>
<td>375.60</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>----------------</td>
<td>------------------------------</td>
<td>--------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>10 000</td>
<td>600.00</td>
<td>825.60</td>
</tr>
</tbody>
</table>

Balance check: Total A minus Total B = Balance C
Total Expenditure (own currency): In this column fill in the total amount spent on each budget line in your own currency.

Total Expenditure (foreign Currency): In this column fill in the total amount spent per budget line for any foreign currency expenses.

Total amount spent = B: Add up total expenditure in each column and fill in totals.

Total Income = A: Fill in the total amount of income in each different currency. If you exchanged money and bought foreign currency include the amount you spent in your own currency as an expense and remember to record the amount of foreign currency you received as part of your foreign currency income.

Total amount to be refunded /returned: This figure is calculated by subtracting the totals recorded in B (total expenditure) from the figure in columns A (total income).

If the expenditure was less than the income (if you have money left over) then the amount will be calculated here. Funds left over may have to be returned to the donor or may be kept – check your contract or agreement.

If the amount of money spent was more than the money received, it may be that theses expense will be refunded. Sometimes budgets are set and any over expenditure will not be refunded – again check your contract or agreement.

**Handing in the financial report and reconciliation**

Make sure that you hand in reports in time. When giving in the report you may have cash to return. If you do hand in cash be sure to ask for a receipt to record that you did return the money. You may be asked to deposit the amount in a bank account.

Keep a photocopy of your reports and any deposit slips or receipts. You may need these records at some point.

<table>
<thead>
<tr>
<th>Budget category</th>
<th>Total expenditure (own currency) SA Rand</th>
<th>Total expenditure (foreign currency) Zimbabwe $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fuel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oil and repairs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per diem</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total amount spent = B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total income/grant = A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total amount to be returned/refunded = A - B</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 4
Thank you letters

It is important to consider all the different groups and individuals who have contributed to the success of your trip and to find an appropriate way of thanking them. Not only is it considered good practice, it is also an important step in maintaining and strengthening your relationship with those concerned.

Who should we thank?
You could discuss this issue with the participants during your final evaluation and planning meeting. This will allow the participants to contribute their ideas. When planning who to thank, remember to think about anyone who:
- May have hosted your group (for meetings, presentations, field visits or overnight accommodation)
- Has contributed funds
- Has contributed in kind (for example, lent you equipment or given any other form of assistance)
- Has positively influenced your trip.

Remember to congratulate and thank the participants – they were just as responsible for the success of the trip as anyone else.

What should the letter say?
You may find it useful to write up the format for your letter and make small changes according to who the recipient is. For example you may want your letters to the donor or sponsors of the trip to be more formal.

Tips

✓ It may be a good idea to include a photograph that captures a relevant part of the trip with your letter
Here is a real example of a thank you letter:

IUCN Mozambique

23, Fernão Melo e Castro, P.O. Box 4770
Sommershield, Mâputo

Phone: (258-1) 490599/499547/499554  Fax: (258-1) 490812

Namibia Nature Foundation
P O Box 245
Windhoek
Namibia 15 January 2003

Dear Chris, Anna and Amanda,

First of all we wanted to wish you a happy and successful New Year! Thank you so much for giving the communities from Matutuine and Catine, as well as IUCN, the opportunity to experience the "world" of conservancies, joint-ventures and community based tourism.

We have finally finished compiling the trip report, which took a bit longer than expected. Now, the only thing missing is the pictures page, which we can forward to you once it has been finished. The communities are still very excited about the Community Based Tourism prospects...so we are working on trying to make that a reality somehow this year...we'll keep you posted.

Again, thank you so very much for a wonderful experience in Namibia!

Best regards,

Lise Jensen

Programme Officer
Chapter 5
Tidying up and packing away

This is usually one of the last and least enjoyable tasks!

Now that you have returned home, most people will be focusing on getting back to their homes and families. Without careful planning, the facilitators could find themselves coping with the whole task.

Before the participants and co-facilitators all return to their homes and work, make sure that the group assists in the cleaning up and tidying away. This may involve cleaning equipment and vehicles as well as ensuring that things get returned to their owners and packed away. You may need to organise repairs and replacements as well.

There are several important things to remember:

1. **Ensure that the group members take responsibility for the task**
   It may be a good idea to work with the group to decide how this final chore will be done. You may draw up a list giving different people or groups different responsibilities. This should help to make the job quicker and easier for everyone. Remember to clarify with the group members at the beginning of the trip that this will need to be done. If you experience any resistance and reluctance you can remind the group that this was an agreed on expectation and activity.

2. **Ensure that everything is cleaned and in good condition**
   Before packing away ensure that all equipment is cleaned and in good condition. Are you responsible for having vehicles cleaned or serviced? Make sure that all breakages or damage are recorded and a plan for their repair or replacement is in place. Remember that gas bottles may need to be filled.

3. **Return all borrowed equipment in the same (or better!) condition as you received it.**
   You may have borrowed items of equipment, books or other necessities for your trip. When the trip is over be sure to return all borrowed items as soon as possible and in good condition. If you had any losses or breakages let people know and establish what can be done to replace or repair the items. Remember that you may want to write a thank you letter to the person/organisation that lent the equipment to you.

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**Tips**

- Before you leave make sure you have recorded anything that was damaged or in poor condition at the start of the trip.
- Remember to make provision in your budget for cleaning, repairs and replacements.
APPENDIX 1: Community participation programmes in the SADC region

Many programmes in the SADC region promote community participation and encourage community exchange visits:

The Community-based Natural Resource Management (CBNRM) programme
Namibia’s Programme To Combat Desertification (NAPCOD)
The Forum For Integrated Resource Management (FIRM)
The Community Exchange and Training Programme (CETP)
The Desertification 2000-2002 process.

Over the past few years networking and study visits have become an important activity in the regional CBNRM programme. Most groups are conducting visits within their own countries or to other Southern African countries. These groups include government workers, NGO workers, community groups, traditional leaders, youth groups, teachers and school learners. Communities and projects are hosting more and more visiting groups.

Communities at NAPCOD pilot sites throughout Namibia are involved in conducting their own surveys to assess natural resource and socio-economic conditions and changes. They plan and implement activities that promote sustainable development and combat desertification. They monitor and evaluate progress. They share their experiences with other communities.

FIRM is a community-based approach in Namibia that empowers communities to practice natural resource management, using assistance and services provided by NGOs and government departments. It has resulted in a strong sense of involvement, ownership and investment by individuals in community projects. This concept is now being introduced to other communities through community exchange visits.

The CETP is a SADC programme, presently operating in South Africa and Zambia, which brings together local communities, governments, donors and NGOs for exchanges of experience and best practices through a process of exchange visits, training and information sharing. It enables people...
   • to broaden their horizons,
   • to learn about alternative ways of addressing issues of concern,
   • to validate their own knowledge, skills and resourcefulness and
   • to develop new visions for a better future.

The goal of the Desertification 2000-2002 process was essentially to promote the combating of desertification by connecting science with rural community action. Communities from Namibia and South Africa, together with scientists and development workers, attended an international desertification conference in 2002. The international delegates then visited the communities to explore their approaches to combating desertification. All delegates then gathered for further deliberations at a synthesis workshop. As part of the community preparations, community members held planning meetings, participated in community exchange visits and learnt skills that would assist them to portray their efforts to combat desertification. This is an ongoing process, promoting community exchange visits in SADC countries and encouraging links between communities, researchers and development organisations.

The Napcod and CETP programmes, as well as the Desertification 2000-2002 process, are implemented within the framework of the United Nations Convention to Combat Desertification (UNCCD), its aim being to combat desertification through effective action at all levels. The convention recognises that grassroots resource users are central to identifying and implementing their own solutions. The overall goal of such programmes is to encourage wise land use practices, through community participation, which lead to the improvement of the living conditions of the poor. Furthermore, community exchange visits promote the exchange of experiences between natural resource users as a basis for building partnerships between local communities, the government and other partners, including donors and NGOs.
# APPENDIX 2: Travel requirements For SADC countries

Table detailing health requirements, passport validity, visa requirements and addresses of issuing agencies for SADC passport holders.

SADC countries: Botswana, Lesotho, Zambia, Zimbabwe, Malawi, Tanzania, Angola, Mozambique, Mauritius, Namibia, Swaziland, South Africa, Seychelles and Democratic Republic of Congo.

Commonwealth countries: Botswana, Lesotho, Zambia, Zimbabwe, Malawi, Tanzania, Namibia, Swaziland, South Africa.

<table>
<thead>
<tr>
<th>Country</th>
<th>Passport requirements</th>
<th>Visa Requirements*</th>
<th>Health Requirements</th>
<th>Local Issuing Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Botswana</td>
<td>Valid passport</td>
<td>Visa needed, except from other Commonwealth countries</td>
<td>Yellow Fever certificate – if from endemic area. Malaria at all times. Bilharzia &amp; sleeping sickness present. Plus List A</td>
<td>Chief Immigration Officer, (visa section) PO Box 942, Gabarone, Botswana Tel: +26(7)3611300 Fax: +26(7)352996</td>
</tr>
<tr>
<td>Lesotho</td>
<td>Valid passport</td>
<td>No visas from Commonwealth countries</td>
<td>List A</td>
<td>Director of Immigration &amp; Passport Services, PO Box 363, Maseru, Lesotho Tel: +26(6)314700 Fax: +26(6)310270</td>
</tr>
<tr>
<td>Zambia</td>
<td>Valid passport</td>
<td>Not required by SA passport holders</td>
<td>Yellow fever certificate for northern and Western Zambia. Malaria high risk all year. Plus List A</td>
<td>Zambian High Commission, PO Box 12234, Hatfield, Pretoria, SA Tel:+27(12) 3261847 Fax: +27(12)3260263</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>Valid passport</td>
<td>Visa required. Can be obtained at port of entry.</td>
<td>Yellow fever if coming from an infected area. Malaria a year round risk, esp. Zambezi valley. Plus List A</td>
<td>Chief Immigration Officer, Private Bag 7717, Causeway, Harare. Tel:+26(3) 4 791913 (ask for visa section)</td>
</tr>
<tr>
<td>Malawi</td>
<td>Valid passport</td>
<td>Most foreign countries do not require visas</td>
<td>Yellow fever if coming from an infected area. Malaria – high risk throughout the year. Plus List A</td>
<td>Dept of Immigration, PO Box 331, Blantyre, Malawi. Tel: 623777</td>
</tr>
<tr>
<td>Tanzania</td>
<td>Valid passport</td>
<td>Visa required</td>
<td>Yellow fever certificate. Malaria – high risk throughout the year. Epidemic meningitis present in dry season. Plus List A</td>
<td>High Commission of Tanzania, PO Box 56572, Arcadia 0007, SA Tel: +27(12)3424393/71 Fax: +27(12)4304383</td>
</tr>
<tr>
<td>Angola</td>
<td>Valid passport, except from other Commonwealth countries</td>
<td>Visa required, except from other Commonwealth countries</td>
<td>Yellow Fever certificate – if from endemic area. Malaria – very high risk year round. Sleeping sickness – high risk. Plus List A</td>
<td>Embassy of the Republic of Angola, PO Box 8685, Pretoria 0001, SA Tel: +27(12)3420049 Fax: +27(12)3427039</td>
</tr>
<tr>
<td>Country</td>
<td>Passport requirements</td>
<td>Visa Requirements*</td>
<td>Health Requirements</td>
<td>Local Issuing Agency</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------</td>
<td>--------------------</td>
<td>--------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Mozambique</td>
<td>Passport must be valid for 6 months after departure from Mozambique.</td>
<td>Visa required</td>
<td>Malaria – high risk all year round. Plus List A</td>
<td>Mozambique Consulate General, 18 Hurlingham Rd, Illovo, Johannesburg 2001, SA Tel:+27(11)3272942 Fax:+27(11)3272945</td>
</tr>
<tr>
<td>Mauritius</td>
<td>Passport must be valid for 6 months after departure from Mauritius.</td>
<td>No visas required by SA passport holders.</td>
<td>Yellow fever if coming from infected area. No malaria, except in rural areas. Plus List A</td>
<td>Mauritius High Commission, 1163 Pretorius St, Hatfield 0083, SA Tel:+27(12)3421283/4 Fax:+27(12)3421286</td>
</tr>
<tr>
<td>Swaziland</td>
<td>Valid passport</td>
<td>No visas for SA, Namibian or Zimbabwean passport holders.</td>
<td>Malaria in Eastern part of country. Plus List A</td>
<td>The Swaziland High Commission, PO Box 14294, Hatfield 0028, SA Tel:+27(12)3441910 Fax:+27(12)3430455</td>
</tr>
<tr>
<td>South Africa</td>
<td>Passport must be valid for 6 months after departure from South Africa – must have return ticket.</td>
<td>Visa required, except from other Commonwealth countries</td>
<td>Yellow fever if coming from an infected area. Malarial north-east areas. Plus List A</td>
<td>Home Affairs Private Bag X741, Pretoria 0001 Tel:+27(12)325 8081 Fax:+27(12)323 2416</td>
</tr>
<tr>
<td>Seychelles</td>
<td>Passport must be valid for 6 months after departure from Seychelles – must have return ticket.</td>
<td>No visas required.</td>
<td>Yellow fever if coming from an infected area. Plus List A</td>
<td>Seychelles High Commission, PO Box 12337, Hatfield 0028, SA Tel:+27(12)3420534 Fax:+27(12)3420362</td>
</tr>
<tr>
<td>Democratic Republic of Congo</td>
<td>Valid passport – for 6 months after departure.</td>
<td>Visas required by all passport holders.</td>
<td>Yellow fever certificate Malaria – high risk throughout the year Plus List A</td>
<td>Embassy of DRC PO Box 28795 Sunnyside 0132, SA Tel:+27(12)3432455 Fax:+27(12)344454</td>
</tr>
<tr>
<td>Namibia</td>
<td>Passport must be valid for 6 months after departure from Namibia – must have return ticket.</td>
<td>Visa required, for SA holders if not a bona fide tourist.</td>
<td>Yellow fever certificate if coming from an infected area. Malaria – throughout the year north of Grootfontein.</td>
<td>Namibian High Commission, PO Box 29806, Sunnyside 0132, SA Tel:+27(12)4819100 Fax:+27(12)3437294 Or (12)3445998</td>
</tr>
</tbody>
</table>

**List A**
- Polio recommended.
- Tetanus recommended in infected areas.
- Hepatitis A&B recommended
- Typhoid recommended.
- Bilharzia present.
- Rabies present.
- Boiled or bottled water advised.
- Unpasteurised milk must be boiled.

*NB Visa Requirements

All latest visa requirements can be seen on the web at: "http://www.thegsa.co.za"
APPENDIX 3: Templates for financial report and financial reconciliation

### FINANCIAL REPORT

<table>
<thead>
<tr>
<th>Date</th>
<th>Receipt number</th>
<th>Description</th>
<th>Income</th>
<th>Expenditure</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Per diem</td>
<td>Food &amp; Accom.</td>
<td>Fuel</td>
</tr>
</tbody>
</table>

**TOTALS**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
</table>

Balance check: Total A minus Total B = Balance C

### FINANCIAL RECONCILIATION

<table>
<thead>
<tr>
<th>Date</th>
<th>Prepared by:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Budget category</th>
<th>Total expenditure (Own currency)</th>
<th>Total expenditure (Foreign currency)</th>
</tr>
</thead>
</table>

Total amount spent = B

Total income/grant = A

Total amount to be returned/refunded = A - B