MEDUP!

Promoting social entrepreneurship in the Mediterranean Region

Peer Exchange Manual

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MedUp! – Promoting social entrepreneurship in the Mediterranean Region, is focused on promoting social entrepreneurship in Morocco, Tunisia, Jordan, Egypt, OPT and Lebanon to drive inclusive growth and job creation. The project started in March 2018 and has a €5.5 million budget, co-funded by the European Union. Implementation will last four years, and the implementing countries are Egypt, Jordan, Lebanon, Morocco, Palestine, and Tunisia. Actions will focus on:

(I) Promoting country and cross-country policy and advocacy initiatives and public-private dialogue to create an enabling regulatory and policy environment (macro level);

(II) Reinforcing 60 social entrepreneurship support organisations through capacity-building and networking (meso level);

(III) Providing financial and technical support to 100 social enterprises (micro level).

The project is led by Oxfam Italy and implemented by European and Southern Mediterranean co-applicants, in collaboration with the Oxfam regional platform.

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Engagement plays a key role in maximising learning objectives. The higher the level of engagement, the more successful the peer exchange will be.

Table of Contents

1 Introduction

This manual outlines the peer exchange process and its principles. It was written for facilitators looking to implement initiatives in the Middle East and North Africa (MENA) region, regardless of scope and content. It is meant to give guidance and underpin important aspects that the facilitator should consider during implementation.

1.1 Using this manual

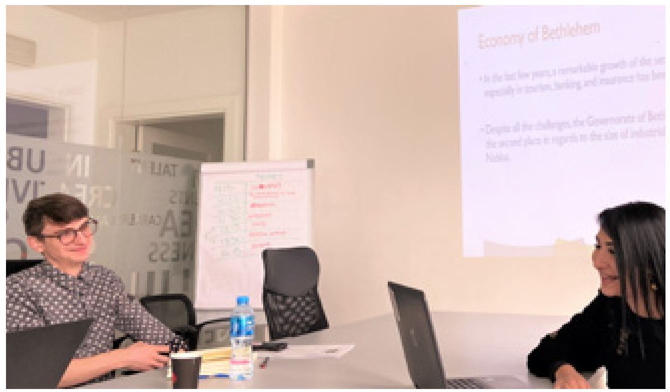
This manual was designed not for facilitators to limit their content to the manual's framework, but to complement it with their own ideas and tools. However, the process and phases described here serve as a guide to give a clear structure to peer exchange. The exercises and templates included here are simply examples, and the manual is not intended to be prescriptive. It is subject to the facilitator's own decision-making.

1.2 Piloting MENA/EU Peer Exchanges

This manual draws on Euclid Network's (EN) experience implementing the PeerEx Programme in Europe, which means peer exchange in the MENA region is seen as a pilot initiative. The final version is the result of a co-creative process between EN, MENA partners (facilitators), and the beneficiaries (peers).

This process was supported by feedback gathered from 5 facilitators (in 1:1 interviews and structured around the same set of questions, please refer to Appendix 8), who used this manual as a guide to implement peer exchanges.

MedUP! Peer Exchange 2020 in Palestine



2

Peer Exchange Principles

Peer exchange is based on peer learning. In empirical research, peer-learning methodology remains broad as the concept, however for the purpose of this manual, the following definition will be used: “a two-way, reciprocal learning activity. It should be mutually beneficial and involve the sharing of knowledge, ideas, and experience between the participants. It can be described as a way of moving beyond independent to interdependent or mutual learning”.[1]

Indeed, peer learning takes place when the participants learn from each other, but most importantly, when they take this knowledge and transfer it to their own context and organisation. This learning activity is effective, provided its principles have been well understood and adopted during the process.

It is vital to set principles for an initiative before trying to implement it. The principles serve as the foundation - a solid base that, in this case, peer exchange will be built upon. It is always wise for the facilitator to revisit those principles throughout the implementation process, to verify whether peer exchange still serves the purpose.

1 Boud, D. (2001). Introduction: Making the move to peer learning. In D. Boud, R. Cohen, & J. Sampson (Eds.), Peer learning in higher education: Learning from and with each other (pp. 1-19). Sterling, VA: Stylus Publishing, p.3.

2.1 **Principle 1** Objectives

The peer learning theory places the emphasis on sharing and mutuality, and indeed those are the key drivers behind the objectives. While the knowledge is exchanged between individual peers, it resonates beyond them, into their organisations. That knowledge is then filtered through the organisation through things like replicating good practices and adapting existing processes using the innovative ideas seen elsewhere. It is a process that increases organisational capacity and stimulates innovation, ultimately making the sector more resilient.

The key objectives of peer exchange

- Exchanging knowledge and good practices
- Increasing the capacity of organisations and individuals who participate in peer exchange
- Building new networks

2.2 **Principle 2** peer engagement

Engagement plays a key role in maximising learning objectives. The higher the level of engagement, the more successful the peer exchange will be. While the objectives outline why organisations should participate in this programme, the importance of engagement underscores how they can reap the most benefits from it.

Essential elements for building peer engagement

- Ensure that peers engage in an honest, committed way
- Ensure multiple avenues for peer engagement (through face-to-face and collective meetings)
- Ensure that peers reflect on their learnings regularly
- Ensure that the engagement process is as simple as possible
- Ensure that peers are aware of the time and effort they should dedicate to the process

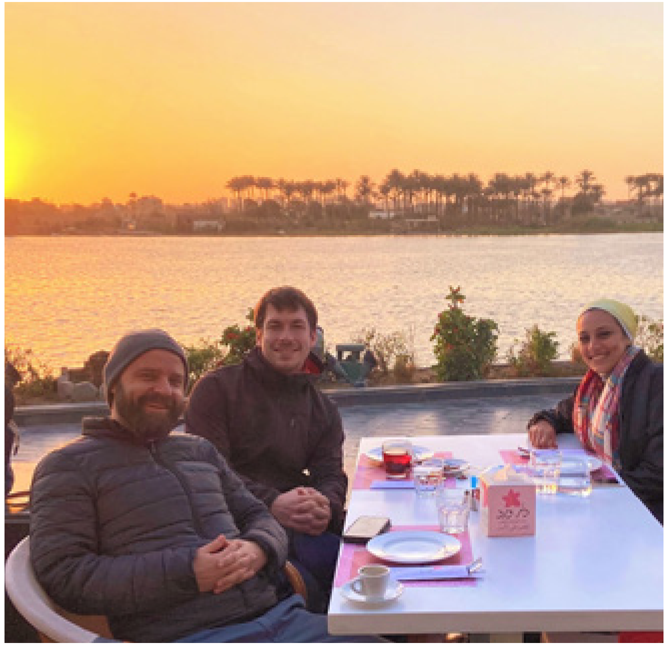
2.3 **Principle 3** Clear structure of the process

It is important for everyone to be aware of both the timeline and what the peer exchange process entails. The overall timeline should be set prior to starting the process. Please refer to **chapter 3** for a suggested timeline.

2.4 **Principle 4** Facilitator/mentor support

Support from staff that will supervise and help guide the participants must not be undermined. Peer exchanges require high levels of commitment and self-determination from peers. But to achieve those levels, they need sufficient support throughout the entire learning process. (more details in **chapter 3.3**).

MedUP! Peer Exchange 2020 in Egypt



3

Peer Exchange Process

There are plenty of different ways to implement peer exchanges, but this manual follows a phased approach. This structure is designed to simplify the implementing process for the facilitator, so they can map out a detailed plan for each phase using the activities provided for that phase.

There are 3 main phases in the peer exchange process which are preceded by a foundation stage and followed by evaluation and sustainability phases (a total of 6 phases).

- Foundation stage
- Phase 1. Selection & Matching
- Phase 2. Preparation. How to get things started?
- Phase 3. Implementation
- Evaluation. Achieving and measuring learning outcomes
- Sustainability. How to keep peer engagement going?

The next section of this manual will take a more in-depth look at each phase to help guide facilitators to successful delivery. Helpful tools (exercises and templates) are included in the Appendices. The phases are designed to be followed consecutively, as each one forms the base for the next.

Timeline

The length of each phase is not set in stone. It depends on the timeframe of the entire process of peer exchange and should be tailored to the specific case. The table to the right is an example of how to divide the time between phases, assuming the entire peer exchange is slated to last 9 months in total, including 2 consecutive peer exchange weeks:

- **Peer exchange programme**
  9 months
- **Foundation stage**
  1 month
- **Phase 1. Selection & Matching**
  2 months
- **Phase 2. Preparation. How to get things started?**
  3-4 months
- **Phase 3. Implementation:**
  2 x 1 week (5 working days)
- **Evaluation. Achieving and measuring learning outcomes**
  During the Preparation phase and 6 months + 12 months after peer exchange

Table 1 *Overview of the peer exchange process*

Stage	Duration	Key Components	Key Actors	Key Challenges
Foundation stage	1 month	• Context • Theme • Target audience • Geographic dimension	Facilitator	• Level of contextual knowledge • Selecting the right theme and target audience for the context
Phase 1. Selection & Matching	2 months	• Call for proposals • Guide and application form • Peer selection • Peer matching	Facilitator	• Efficient selection process • Developing clear selection and matching criteria • Adequate peer matching
Phase 2. Preparation	3-4 months	• Step 1 – establishing peer engagement, trust, and commitment: Identifying challenge(s) • Step 2 – choosing the model for peer exchange weeks: - Identifying learning outcomes • Step 3 – Shaping the peer exchange week agenda: Verifying the outcomes	• Facilitator • Matched peers (pair)	• Smooth communication between peers • Adjusting peer week model to the needs of peers • Consistency in selected activities corresponding to the phases of learning process
Phase 3. Implementation	2 x 1 week (one week in each peer's country)	• Individual meetings • Collective meetings • Final event	• Facilitator • Peers • Other host organisation staff • External experts • Relevant stakeholders	• Logistics • Intensity of individual meetings • Quality of individual and collective meetings • Engaging external experts and other stakeholders
Evaluation	• During final day of individual meeting: reflection • During the final event: general evaluation • 6-12 months after peer exchange	• Reflection • General evaluation • Post-peer exchange evaluation	• Facilitator • Peers	• Measuring the outcomes • Level of peer engagement in the evaluation process • Gathering the evaluation results
Sustainability	After peer exchange		Facilitator	• Keeping peers engaged • Measuring the long-term outcomes of peer exchange

3.1 **Foundation** stage

The peer exchange method is most effective when it is limited to a specific area

The peer exchange method works best when all principles are met (**Chapter 2**). Those should be kept in mind and re-visited throughout the entire implementation process. Once the principles have been well established and communicated, then clearly identify each of these aspects according to the case-specific requirements before moving on to the next phase.

Context

Context is simply circumstances specific to a geographical region that are shaped by the political and social setting. It is important to carefully consider the context when implementing any initiative, otherwise there is a real risk that the initiative will not serve the purpose.

Research is crucial to understand who should be involved in the given initiative and why

Every choice should have a strong research-based foundation, regardless of the sector (public, third, or private) or area of interest (social entrepreneurship, leadership, etc.). That research is key to understanding the initiative and why it should be part of the initiative. Research can be done informally, by contacting local organisations/institutions and getting to know their work, the social groups they work with, and stakeholders they interact with on a daily basis. This kind of informal research should always be complemented by sufficient qualitative research.

Theme

The theme is largely derived from the context. Conducting a needs assessment should also help identify the challenges and needs in the sector. The peer exchange method is most effective when it's limited to a specific area – i.e. social entrepreneurship or leadership. This helps narrow the focus to specific issues within the area of interest during the peer exchange week.

Target group

Clearly identify the target group. This group will include representatives from organisations in your pre-selected sector. Peers that will participate in the exchange are individuals, not organisations, so it's important to clearly outline your peer selection criteria prior to the matching & selection process (more details in **chapter 3.4**).

A geographically diverse peer group brings immeasurable added value

Geographic dimension

Engaging peers from different regions, countries, or even continents brings immeasurable added value to peer exchange. It is tremendously helpful in breaking down prejudices, building mutual respect, and learning about other cultures. In terms of knowledge transfer, peers will have the unique opportunity to study practices and find ways to apply them in new contexts (country, region, etc.). The peer exchange method can be applied multi-dimensionally:

- Cross-border (between 2 countries)
- Cross-regional (between 2 countries in the same region, or 2 regions in one country)

The geographic scope depends on the needs that were assessed ahead of the peer exchange programme. The needs assessment will highlight which dimension will be the most beneficial for the participants.

It's important to keep the logistical limitations in mind when considering cross-border exchanges, and be sure to build in extra time for practical arrangements (visas) and costs (long-haul flights).

Table 2
Key aspects Foundation stage

Key Aspects	Key Challenges
Context	• High youth unemployment levels • Social entrepreneurship as the key instrument for improving employability among young people • SESOs as key actors in supporting SEs to grow and scale up
Theme	• Social entrepreneurship
Target group	• Leaders/ higher management of SESOs in Europe and MENA region
Geographical dimension of peer exchanges **reading resources** on European region	• Europe and MENA region

3.2

Phase 1 Selection & Matching

Peer selection is driven by case-specific aspects (context, theme, target group, etc). Once those are clearly identified, it is time to move on to the next phase.

The call for proposals should be compact, formed of bullet points and in a user-friendly format

Call for proposal

Call for proposal includes a short synopsis of the programme, application deadline, and a link/website for the guide and application form.

It should be disseminated across a range of social media outlets: Facebook, LinkedIn, organisation's website, and/or other platforms that are relevant to your target group and region.

Guide & Application form

The call for proposals should include a guide and application form. Please see **Appendix 1** for guidance and suggested content. It should be:

- Compact
- Structured as bulleted lists or statements rather than as a narrative
- Available in a user-friendly format that can be submitted online

Each applicant should be assessed against case- specific selection criteria

Selection

Once the call for proposals is finalised, it is a good idea to appoint a committee or an individual to select applicants. Each applicant should be assessed against the case-specific selection criteria. Suggested selection criteria:

- Staff members from an organisation that represents the sector
- Position level (upper management, leadership position, professional experience, etc.)
- Able to commit the time required for participation in peer exchanges
- Available to travel to peer exchange destination(s)
- Specific knowledge requirements (language skills)

If there are more applications than there are available spaces after the 1st selection round, the facilitator should schedule individual calls to assess the applicants' level of commitment and interest as well as their area of expertise. The final selection should be announced in individual e-mails, along with information on what happens next.

A webinar gives the opportunity for peers to get to know each other

Matching

Matching process starts by gathering all of the successful applicants together. It is crucial to build the momentum for future activities. Given the geographical distance, the meeting will be held online - i.e. a webinar. It is an ideal medium that allows you to mix different types of participant interaction – listening, active participation, and Q&A. Below is an example of a typical opening webinar agenda:

- Welcome (outline agenda)
- Introduction (context of peer exchanges and why we are here?)
- Explanation of the peer exchange process
- Peer presentations (no more than 3 minutes per peer)
- Next steps (what happens next)
- Q&A session

The webinar gives peers the opportunity to get to know each other and their areas of expertise and provides a comprehensive introduction to the peer exchange method. There are two different ways to approach the matching process:

- Following case-specific matching criteria
- Involving peers in the matching process

Following case-specific matching criteria

This method requires clearly outlined case-specific matching criteria. Suggested matching criteria:

- Common challenge/dilemma
- Common area of interest (i.e. Social Enterprise that focuses on women)
- Formal role/position (fundraiser, project manager, etc.)
- Career level (director, senior manager)
- Location

3.2 continued

Other criteria can be added depending on the case. The facilitator then matches peers using the identified criteria, while keeping the following aspects in mind:

- Did you consider the possible limitations that career level can have on knowledge exchange and that pairing peers with different experience levels might in fact stimulate innovative thinking?
- To what extent is professional background relevant or irrelevant when peers are tackling a common challenge?
- How important is to find a common challenge between peers to make knowledge exchange effective?
- Consider the limitations when matching peers: logistics, time constraints, different cultural backgrounds.
- It is important to revisit the objectives of peer exchange and make sure the peer matches have the best chance of learning from each other.

Involving peers in the matching process

Involving peers directly allows them to be matched according to their own criteria

This method demands more effort, but by involving peers directly, the facilitator can create flexibility and allow peers to be matched according to their own criteria. It is a less prescriptive approach, and the responsibility for matching is distributed, and therefore participatory. After the introductory webinar, the facilitator will share each peer's profile with participants (group e-mail) and ask each peer to provide their 3 peer preferences, ranked from most to least preferred. After gathering all the information, the facilitator will finalise the matches based on peer preference. It is important to let peers know that the matching might not perfectly reflect their preferences.

Both of these methods can be used to pair up peers. The group dynamics will shift, which will influence the remaining phases.

Things to consider

While involving peers in the matching process, it can be helpful to prepare a survey on the common challenges or area of mutual interest.

3.3

Phase 2 Preparation: Getting things started

The matching process will divide peers into pairs. This means that from now on, the two peers will closely collaborate on the actual peer exchange week. The initial engagement and interest was built in the introductory webinar. At this point, peers are:

- Aware of the principles of peer exchange (objectives, engagement, timeframe, and support).
- Aware of the theme of the peer exchange

Peers interact systematically on both individual and organisational levels

Peers will now enter into a relationship structure that is built around levels of engagement, both individual and organisational (see **Appendix 2**. Guide for Mentors, Section 2: Support). Peers will regularly interact on both levels – individually, with their matched peer by sharing their personal values, and at organisation level, by representing their home organisations, referring to the portfolio of activities, and sharing work that is driven by their home organisation's mission. The aim of the steps in this phase is two-fold:

- To make sure that peers build know-how in a structured way
- To make sure that peers tailor the content of their exchange to their mutual interest within the theme of the peer exchange programme

Table 3 *Preparation Steps*

Step	Structure & Relationship	Content
Step 1	Establish peer engagement and commitment	Selecting challenge(s) that peers will focus on during the exchange
Step 2	Select the peer exchange week model	Defining learning outcomes related to the identified challenge(s)
Step 3	Shape the peer exchange week agenda	Establishing a clear learning process for each challenge and achieving learning outcomes

3.3 continued

Step 1

Structure & Relationship

As mentioned in the principles, one of the key factors keeping peers engaged at every phase. The engagement process should be simple and clear. (See **Appendix 2**: Guide for Mentors, Section 1: Planning) This activity will help the facilitator and peers structure future interactions and strengthen their commitment to the programme.

Content

The peers spot key challenges and decide which of them they want to tackle

Peers will establish the initial connection during the matching process, and will both:

- be familiar with each other's profile
- have a preliminary overview of each other's strengths, organisationally and individually (the areas of work).

The goal of this step is to identify very concrete challenge(s) for each peer's organisation within the areas of work.

Peer interaction (with mentor support, see **Appendix 3**: Agreeing on the content) will focus on recognising each other's expertise, resources, and best practices within the areas of work so they help find ways to overcome one another's challenge(s). Once they have pinpointed the areas of work for each organisation, the peers will be able to spot the challenges they struggle with. Peers will then mutually decide which challenge(s) (max 2 per org) to focus on during the peer exchange week:

Table 4 *Challenge examples*

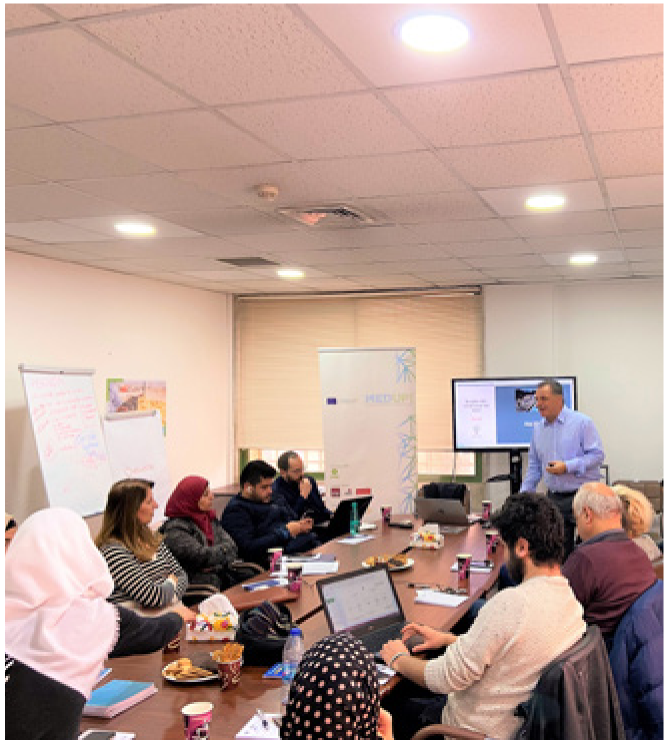
Example	Peer X	Peer Y
Theme	Social Entrepreneurship	Social Entrepreneurship
Areas of work	Financial sustainability	Impact measurement
Potential challenge(s) within the area of work	How to diversify income?	How to select or develop the right metrics?

The mutual engagement that comes from identifying of the content for their exchange week allows peers to:

- build a baseline for achieving objectives (**principle 1**)
- start to build mutual trust & understanding (**principle 2**)
- demonstrate their commitment to collaboration (**principle 2**)

Things to consider

At this stage, it is important for peers to understand what to expect from the whole peer exchange process. So it is a good idea to share the comprehensive version of this document with them. Please refer to **Appendix 7**: Roadmap for peers.



Working Session during MedUP! Peer Exchange 2020 in Jordan

3.3 continued

Step 2

Structure & Relationship

One-week exchanges are ideal for engaging peers in multiple ways

A weeklong exchange is the ideal amount of time for most professionals to dedicate to peer learning. It is also short enough to allow them to break out from their work routine. Peer exchange week includes:

- Travel to the host peer destination
- Face-to-face meetings
- Spending 5 working days together
- Participating in a range of activities that contribute to the peer exchange objectives

A weeklong exchange gives the facilitator the opportunity to plan the activities in a balanced way that engages peers on multiple levels (**principle 2**). This can be a combination of:

- Individual meetings (1-to-1 sessions)
- Meetings with other staff members at the host organisation
- Site visits
- Meetings with other stakeholders (relevant to the theme) collaborating with the host organisation
- Collective workshops with other peers at the same location
- Social/cultural activities

The specific schedule will depend on logistics, theme, and the host peer's level of flexibility. It is important to build in a variety of activities and balance the intensity. Quality is more important than quantity.

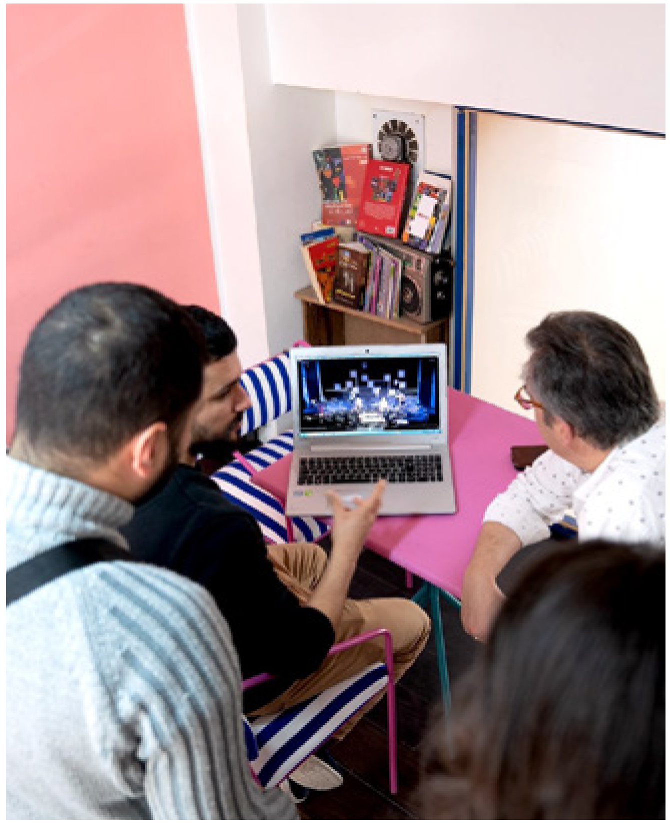
You can find example exchange week models in **Appendix 4**. This step will conclude by agreeing on a model, which will serve as a baseline for shaping the exchange week agenda.

Content

After the peers have agreed on the challenge(s), they can fill out the table in **Appendix 3**, which will help them focus on learning outcomes for each challenge and organisation. It allows them to identify how they can contribute to each other's knowledge acquisition during and beyond the peer exchange week.

Knowledge exchange can happen using a mixture of methods and tools, including: sharing concrete tools, documents, templates, training methods, and best practices that clearly work.

Peer Exchange Tunisia 2020



3.3 continued

Step 3

Shaping the peer exchange week agenda is the most exciting part, but also crucial to success. In step 1, peers identified the challenge(s), they will be tackling, in step 2, they agreed on the learning outcomes. In step 3, they will focus on shaping their peer exchange week agenda, adapting the learning process to the content (challenges).

Method and structure of the meetings depend on the needs and preferences of the peer

Structure & Relationship

The structure of the meetings will depend on the needs of peers and methods they feel the most comfortable with. Peers may choose a collective meeting at the host organisation for an introduction to the challenge and then shift to 1:1 sessions to dive deeper into the nuances of the challenge. Peers will usually assess their knowledge resources accordingly and identify the interaction that is the best match for each part of the learning process.

Content

It is important to build the agenda around the challenge(s) the peers have. This learning activity involves incremental know-how building. To achieve the learning outcomes, peers should follow the learning sequence for each challenge as outlined in table 5.

The peers start steadily taking ownership of the process

The facilitator's role is to support peers as they shape the agenda by providing guidance and overseeing the process. It is important for peers to start steadily taking ownership of this process during the preparation phase, and the facilitator's role will diminish over time to mere oversight. (See **Appendix 2**: Guide for Mentors, Section 2: Support) .

Things to consider

- Peers are also learning while socialising. Allow them to spend time beyond the office walls.
- Encourage peers to exchange reading material so they can be well prepared for peer exchange individual meetings.

Table 5
Challenge learning sequence

Learning Process	Focus Points	Interaction Acilitation
Introduction to the challenge	• baseline knowledge • introduction session on activities in each organisation relevant to the challenge • identifying enablers and barriers typical of the challenge	• 1-to-1 sessions • meetings at the host organisation with other staff members
"Deep dive" into the challenge	• deep analysis of barriers and enablers; how to overcome the barriers and develop more enablers • compare/share best practices and how the y can be applied in other contexts • share relevant tools • meet relevant stakeholders to connect and find inspiration for possible solutions	• 1-to-1 session and/or relevant staff members • meetings with other stakeholders (relevant to the theme) who collaborate with the host organisation • meeting with beneficiaries of the host organisation (if relevant)
Reflections and next steps	• reflecting on key learnings from the individual meetings • opportunities for further collaboration to overcome the challenge(s)	• 1-to-1 sessions

3.4

Phase 3 Implementation

Individual meetings are recognised as the most effective way to exchange knowledge

Individual meetings

The peer exchange week is built on 2 main formulas: individual meetings (working in pairs) and collective meetings (group-based learning).

Individual meetings are shaped largely by the peers themselves. This provides flexibility and allows them to choose the knowledge-sharing approach that works best for them. It also creates space for creativity and enhances mutual commitment. However, when working with peers on their agenda, the facilitator can suggest useful knowledge-generation tools:

Table 6
Examples for knowledge-generating tools

Learning Process	Knowledge Generation
Introduction	• Peer (organisation) produced knowledge products • Recent internal/external publications/annual reports/ research papers, etc.
Deep dive	• Training sessions • Site visits/study tours • Externally produced knowledge products • Joint activities, involving other relevant staff members
Deep dive	• Key learning (peer-to-peer reflection) • Collaboration action plan, how peers can work together beyond peer exchange

However, the best tool for keeping peers committed and motivated is when peers get to be with each other and work together, and get first-hand experience of each other's work environment.

Peer exchange puts the emphasis on individual meetings (working in pairs), as it is recognised as the most valuable, effective way to exchange knowledge, with a higher likelihood of those relationships turning into fruitful future collaborations. In the PeerEx Programme, EN found that more than 60% of peers who were matched and worked together during the exchange maintained contact and looked for other opportunities to collaborate on future initiatives.

Facilitator support

As emphasised earlier in the manual, support is a key part of making the peer engagement process as simple as possible (**principle 3**). The facilitator's primary role is during phase 2 preparation. The implementation phase focuses on executing the detailed peer exchange week agenda. The facilitator should make sure that peers have a detailed copy of the peer exchange pack, which should include:

- Peer exchange week agenda
- Date, time, & place of meetings
- Relevant contact information
- Basic logistical information (relevant to the location)
- Any additional/relevant case-specific information

The facilitator should also sit in on meetings (80%), while still allowing peers to enjoy standalone sessions.

Collective meetings

From the challenge to the theme

Both peer exchange week models build in time for joint peer activities. In addition to individual time, peers will participate in group-based learning sessions.

The joint peer activities are largely driven by the theme that was identified in the foundation stage. Here, attention shifts from the challenge, a key driver in the individual meetings, to the theme. Collective meetings will look at sector-specific knowledge (i.e. third sector) that focuses on the area of interest (i.e. social entrepreneurship). The facilitator can consider following types of interaction facilitation:

Table 7
See Appendix 5 for a complete description of these activities.

Interaction Facilitation	Facilitator
Thematic training	• External expert or the host organisation
Case study exercise	• Peers
Action learning	• Internal facilitator (min 1 per 6 peers)

Site visits

Collective meetings should not be limited to "classroom activities", and it is important to recognise that site visits/study tours are powerful learning tools. "Learning by doing" encourages peers to engage with people and places and better understand the host peer's working environment.

Study tours and site visits complement to "classroom activities"

Key benefits

- Peers interact with each other in a unique setting (**principle 2**)
- Enhances trust between peers (**principle 2**)
- Help to understand the working context of the hosting peer
- Broader understanding of society and culture in the relevant country, region, etc.
- Opportunity to build new networks (**principle 1**)
- Increases motivation and stirs inspiration

The destination will be context specific and should be of interest of all peers. It is a good idea to ask the host peer for ideas.

Final event

The goal here is to provide a safe space for peers to share their first impressions of the peer exchange week. At this point, the peers will probably be overwhelmed by the amount of knowledge intake and meeting new people. The opportunity to share and hear from others gives peers a sense of celebrating their achievements. The event can be organised in a small setting (only peers) or as an open event (inviting other stakeholders – if the peer group is larger than 8). In both cases, it should include:

- Setting the scene: why are we here? (facilitator)
- Sharing experiences from the peer exchange week by peers (i.e. short presentation by pair of their week as a PPT or images or storytelling).
- Reflecting collectively on key learning from peer exchange (peer-to-peer feedback)
- What's next? (if relevant, upcoming scheduled events within peer exchange programme)
- Closing remarks (facilitator or/and peers)

This can also be a good opportunity for the facilitator to distribute evaluation forms.Lastly, the event will be held on the last day of the peer exchange week, so it is important to consider logistical limitations – time of day & length (peers returning home).

Individual meetings are recognised as the most effective way to exchange knowledge

Conclusion

At the end of the week, peers should have increased their knowledge and gathered a portfolio of potential solutions for overcoming the challenge or replicating/applying solutions in their own context at their home organisation. The reflection session (part of the learning process) plays a key role here. Peers have the opportunity to go back to the learning goals they set early on in the process and chart their progress towards achieving them. There will be a combination of achievable short-term outcomes (instant sharing of existing tools) and those that require follow-up on either the individual or organisational level. By identifying further opportunities to collaborate, peers will discover that, in the long term, those collaborations will help them find solutions to the challenges they identified at the beginning of the exchange.

Things to consider

- The timing of the meetings may change. Make sure that peers have enough time for transfers from one place to another.
- Make sure that peers are well informed about meeting locations as well as transport information and directions.
- Consider creating a WhatsApp group or other instant messaging tool.
- The final event may provide an opportunity to promote peer exchange as a learning method in your region.
- The final event may double as a networking event featuring peers and their organisations and attracting future funders.

4
Evaluation

Measuring peer-learning outcomes is complex, because knowledge exchange takes place between two individuals who share their experience through conversations and informal discussions. How much of the transferred knowledge will result in the tangible learning outcomes depends on their established relationship and level of engagement.

4.1 **Measuring** learning outcomes

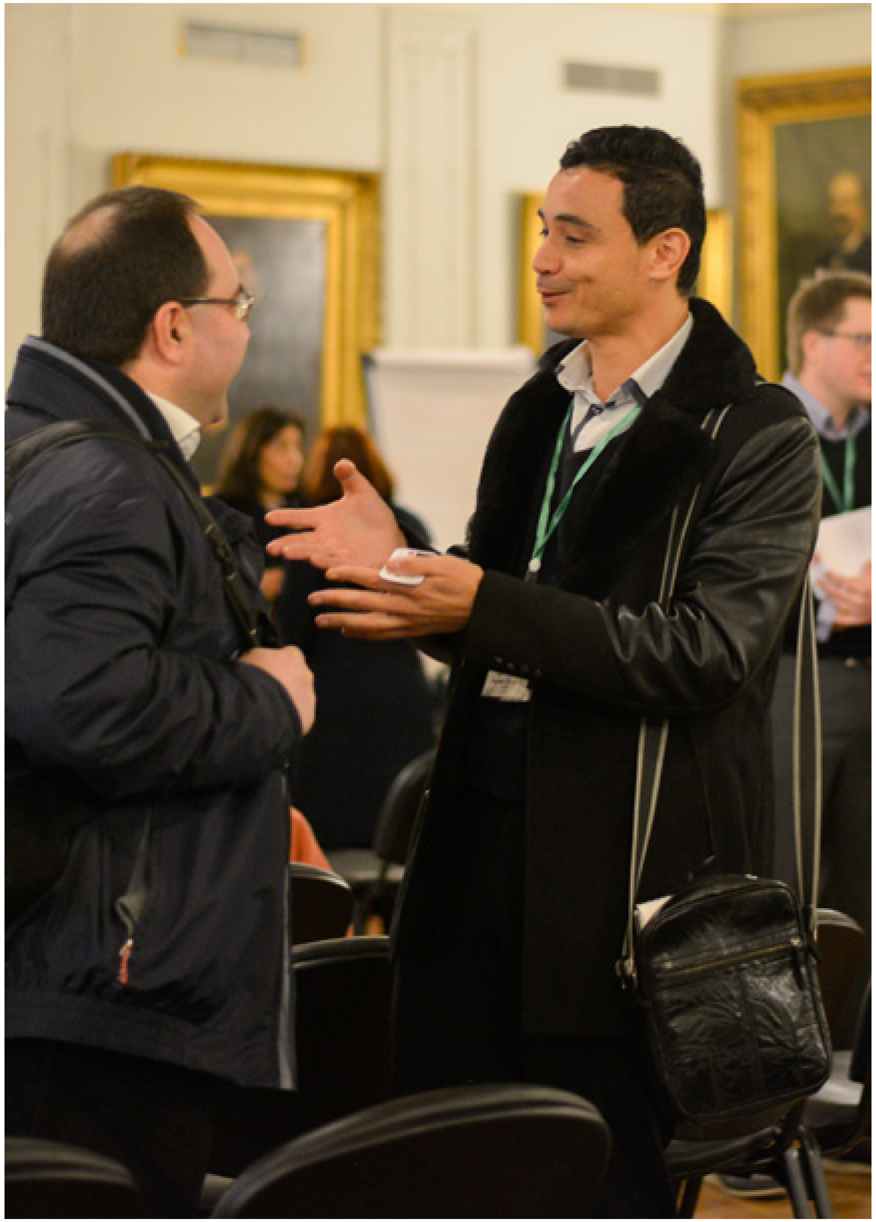
The level of trust and commitment between the peers influences the learning outcomes

Measuring peer-learning outcomes proved to be complex, because knowledge exchange takes place between two individuals who share their experience through conversations and informal discussions. How much of the transferred knowledge will result in the tangible learning outcomes depends on their established relationship and level of engagement. That is why one of the primary focuses in this manual is developing trust and commitment between peers. The facilitator has limited control over the quality of conversations and discussions that take place between peers, but there are some practical ideas worth underscoring for facilitators:

- Ensure that peers share and exchange learning materials – toolkits, guides, internal assessment tools, research papers, policy papers, etc.
- Make sure that peers are using real case studies when discussing relevant challenge/s
- Combine 1-to-1 sessions with thematic trainings/workshops, (rewarded with a certificate of attendance)

The facilitator can suggest these ideas while setting the goals for the peer exchange week. It can be useful to share those goals with the peers' home organisation (other staff members, board, etc.) so peers can go back and share what they have gained from peer learning. This adds an element of accountability to the process.

One of the elements in peer exchange evaluation is reflection. It plays a key role in assessing the effectiveness of peer learning. If peers are able to summarise key discussion points and draw key learnings after each day of individual meetings, it is a good indicator that the process is serving its purpose – know-how building (see the mentor log in **Appendix 2**). At the end of the individual meeting (day 3 or day 4), peers should revisit the goals and outcomes set during the planning phase and identify their gains. Once this is finalised, peers can effectively draft an action plan for future collaboration beyond the exchange.



4.2

The evaluation form serves as an improvement indicator for future exchanges

Evaluation form

Evaluation forms are often used to provide the facilitator with feedback about the initiative. The goal here is not to evaluate learning outcomes but instead to generate feedback on the peer exchange process itself. Peers will fill out the evaluation forms during the final event of each peer exchange week. This will serve as an improvement indicator for the next round of exchanges. It is also a good idea for the facilitator to schedule joint calls with peers to receive more detailed feedback about the specific learning activities from each peer exchange week. Those calls should be held in the two weeks following the exchange week.

You can find sample questions for the general evaluation form in **Appendix 6**.

Lastly, it is a good idea to conduct a post-exchange evaluation (6 months after the peer exchanges) to measure what has been achieved as a result of peer exchange. Be sure to set goals a priori in the foundation stage and keep them realistic. Goals can include:

- Number of follow up calls between peers after peer exchange
- Number of initiatives started in home organisations as a result of know-how transfer (or best practice).
- Number of new collaborations started thanks to networking during the peer exchange

Post-exchange evaluation can be repeated at set intervals, i.e. 12 months after peer exchange.

This kind of evaluation will provide initial indicators for the long-term impact of the peer exchange (impact measurement).

5 Sustainability

Scaling knowledge acquired by the individual peers to their organisations is the final stage of peer learning. It is also the most difficult to measure.

Below are key factors that positively contribute to effective knowledge transfer between returning peers and their organisations:

- Ensuring that the goals of peer exchange are shared with their organisation (discussed in **chapter 4**)
- Ensuring that peers reflect on learnings and share the action plan for collaboration with their organisation
- Ensuring that peers are able to share knowledge upon returning to their organisations (time & place dedicated to reporting on peer exchange gains)
- Ensuring that the organisation is open to new ideas brought back by returning peers
- Ensuring that the organisation is open to investing time and other staff members in developing initiatives around new ideas brought back by returning peers

The facilitator may suggest activities to enhance knowledge transfer to the home organisation, including:

- Post-peer exchange group-based learning with returning peers and other staff members
- Staff member involvement in peers' individual meetings during peer exchange week

Creating a peer exchange alumni group could be another way to keep peers engaged with each other after peer exchanges. However, for this to be effective, the facilitator must provide the peers with the right communication tools, preferably social media channels (Facebook, LinkedIn group, forum, etc.).

6

Virtual Peer Exchange Activities

The ongoing COVID-19 pandemic has made it clearer than ever how beneficial virtual tools can be.

While this manual supports developing and implementing in-person exchanges, there is a wide range of opportunities to integrate virtual activities that can add additional value to the exchange.

This section outlines five examples of how virtual activities can complement in-person peer exchanges. It also offers a list of tools and applications that can be useful for each activity and suggests at which phase of the exchange a virtual activity can be meaningfully integrated.

Table 8
These examples are suggestions designed to provide additional inspiration for a more comprehensive and fruitful exchange experience.

Action	Added Value	Suggested Time/Phase
Virtual Ecosystem Mapping	• Provides a first comparable picture of social enterprise dynamics in the region • Encourages the exchange of ideas and knowledge sharing • Good foundation for stakeholder meetings at later stages	• Preparation phase • Should be reviewed occasionally at later stages
Meeting in Preparation for In-Person Exchange	• Peers can connect ahead of the exchange and start to develop relationships • Peers can discuss the exchange agenda and trade interests, challenges, questions, etc.	Preparation phase
Events/Meetings with Stakeholder Representatives	• Potential to reach out to a wider pool of stakeholders who may not be able to attend in-person meeting • Increases networking opportunities • Peer organisations can be more actively engaged	During and/or after in-person exchange
Collaborative Projects Before or After In-Person Exchange	• Increases learning outcomes through relevant hands-on activities • Can serve as a foundation for future collaboration between peers	Before or after in-person exchange
Virtual Peer-to-Peer/Peer-to-Organisation Training Sessions	• Increases learning outcomes for peers and potentially their organisations	Throughout the process
Individual Knowledge Exchange Platform	• Host peer can respond to their partners' questions, struggles, interests with relevant learning material • Complements general knowledge exchange platform with a stronger focus on each peer's individual needs	Ongoing process

6.1

Integrating virtual activities can add additional value to the exchange

Example 1 Virtual Ecosystem Mapping

Brief Activity Description

Ecosystem mapping is a useful tool for generating a comparable picture of social enterprise dynamics in the given country. It encourages the exchange of ideas and knowledge between peers and raises awareness of knowledge gaps around the ecosystem. By mapping their ecosystem, peers can identify common needs and challenges among actors, which will help them place themselves, as well as the SEs they work with, within a broader framework.

A well-researched ecosystem map also enables peers to monitor changes, opportunities, and growth over time. Additionally, the collected information can facilitate preparation for stakeholder or potential partner meetings. So it is a good idea to review the ecosystem map at multiple points during the exchange and beyond.

The virtual nature of this activity enables the peers to concretise actions for their in-person exchange long before the actual exchange. It saves time and improves the quality of knowledge exchange when the peers meet in-person.

Table 9
Suggested Tools and Features

Tool	Features	Cost
Miro & Lucidchart	• Adjustments can be made weeks after a board is opened • Peers can work on the same whiteboard simultaneously	3 whiteboards for free

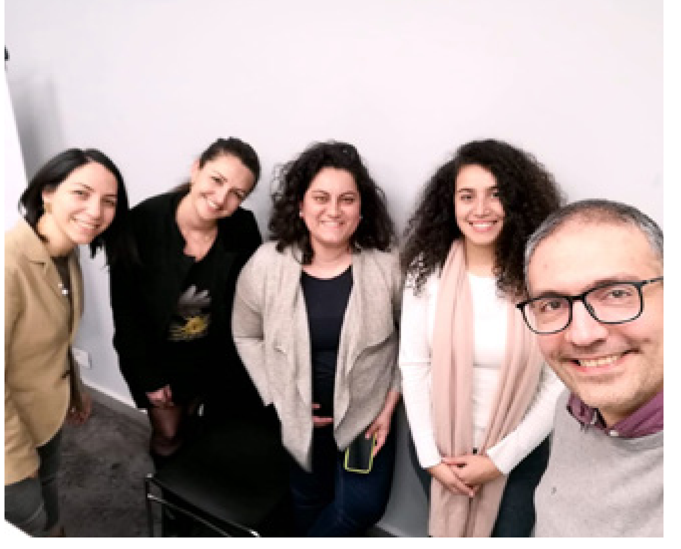
Guidelines/Suggested Steps

- The peers decide together which aspects and actors to include, suggestions: legal framework, access to market, access to skills, access to funding, support infrastructure, key actors and sectors, etc.. This is a good overview graphic, and here is a comprehensive handbook for how to map an ecosystem.
- In the next step, each peer individually maps the ecosystem they operate in, placing themselves and their organisation within the ecosystem & identifying personal needs, opportunities, knowledge gaps, etc.
- The peers present their ecosystems to each other and collaboratively review key aspects.
- The ecosystem overview can then serve as a basis for planning next steps of peer exchange at early stages.
- Peers identify which actors are key to achieving the exchange objective and how they can be included in the exchange process (see Example 3)
- Ideally, the ecosystem should be reviewed occasionally to track developments and to fill knowledge gaps.

Things to Consider

Mapping a country's ecosystem can be a time-consuming process, but is ultimately rewarding. So peers should already have a basic understanding of which aspects are key to their development within the ecosystem and pay special attention to those aspects during the mapping process.

MedUP! Peer Exchange 2020 in Lebanon



6.2

Example 2 Prep Meeting in Preparation for In-Person Exchange

Brief Activity Description

Prep meetings between the peers (and facilitator) help specify which issues should be addressed during the in-person exchanges. It also enables peers to connect and develop relationships. During the meeting(s), the peers can discuss and shape the exchange agenda in detail, familiarise each other with their partner's interests, challenges, knowledge gaps, etc. it allows peers to tailor the content of their exchange to their mutual interest within the theme of the peer exchange programme.

This step can be particularly fruitful if the peers have already mapped their countries' ecosystems. They can apply the knowledge they gained in the mapping process to tailor their in-person activities.

Table 10
Suggested Tools and Features

Tool	Features	Cost
Zoom & Skype	• Popular video meeting tools • Easy to use	Most services are available for free
Prezi	• Useful tool for integrating presentations into video calls in a more interactive way than Skype or Zoom	First 5 presentations are free

Guidelines/Suggested Steps

Decide on the format of the meeting

- One-on-one between peers or should it include the facilitator?
- What should be prepared in advance?
- Before or after ecosystem mapping?
- Is one session enough?

During the meeting

- Peers identify challenges they want to address
- Peers agree on the learning outcomes
- Peers focus on shaping their peer exchange week agenda and adapting the learning process to the content (challenges)

Meeting follow-up

- Ensure that peers are on the same page regarding decisions and next steps

Things to consider

It is up to the peers to make this exchange their own and make sure it addresses topics that are relevant to them.

Peer Exchange 2020 Tunisia

6.3

Example 3 Events/Meetings with Stakeholder Representatives

Brief Activity Description

Shifting events or meetings with a larger attendee list into the virtual space offers several benefits. The peers can reach out to multiple stakeholders in their own country, the exchange country, and beyond. Events can be organised by both the visiting and the host peer, depending on their individual learning objectives and agreed exchange agenda. These events also enable the peer organisations to be more involved in the exchange process and facilitate knowledge sharing.

The purpose of the event can range from discussing common challenges and presenting the peer organisation to a wider audience to establishing partnerships and raising awareness or networking.

Peers can also "accompany" their partner peers to a virtual event. That may include events organised by the peer's organisation and events a peer is invited to and sees as similarly relevant for their partner.

Table 11
Suggested Tools and Features

Tool	Features	Cost
Prezi	• Good option for meetings with a small number of participants • Integrates presentations in an interactive way	First 5 presentations are free
Remo	• For virtual events and fairs with many participants • Potentially wide reach to diverse set of stakeholders who would otherwise be unreached	$100/month
Hopin	• Provides opportunities for networking and pitching/presenting	$100/month
Wonder	• Interactive networking platform • Participants can move freely within the virtual space, join and leave discussions at any time • Good alternative for informal conversations with a wide range of participants	Free

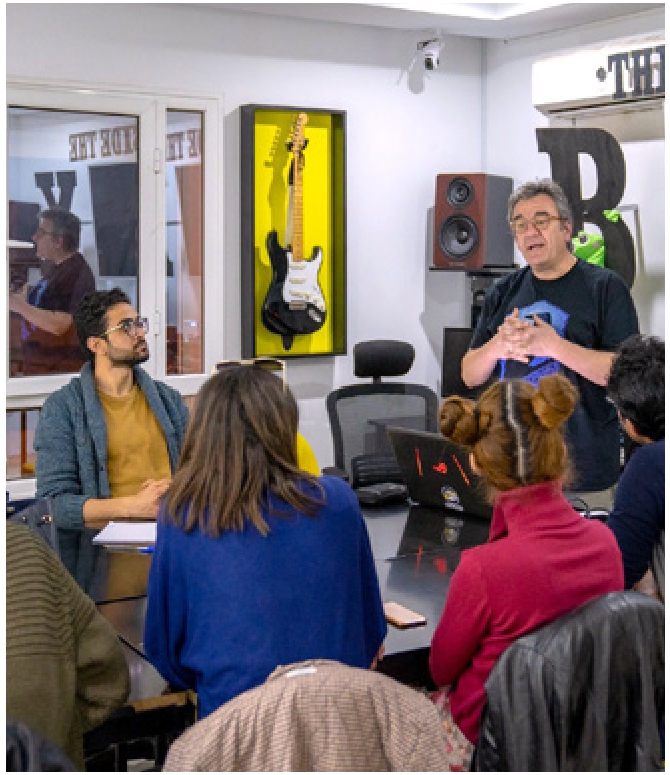
Guidelines/Suggested Steps

- Discuss which event format best serves the purpose
- Preparation is key, and informal networking events benefit from preparation (e.g. having good knowledge of participants, their projects, challenges, ideas, convictions, etc.)
- Follow up on meetings to strengthen connections made or deepen approaches discussed

Things to consider

Peers should critically discuss the cost-benefit ratio before organising a large event for stakeholders, partners, and other players.

MedUP! Peer Exchange 2020 in Tunisia



6.4

Example 4 Collaborative Projects Before or After In-Person Exchange

Brief Activity Description

Based on the agreed goals for the peer exchange, peers can also use virtual tools to set up collaborative projects. Working on a common project remotely is a good hands-on approach to tackling real-life challenges. Apart from the acquisition of practical skills and knowledge, this activity will ideally lead to future collaboration between peers beyond the scope of the peer exchange.

Table 12
Suggested Tools and Features

Tool	Features	Cost
Asana	For strategic planning and collaboration	Free version includes project planning features for up to 15 users
Wrike	For strategic planning and collaboration	Free version includes simple, shared task list for up to five users
Google Docs & Dropbox	For sharing documents and working on them collaboratively	Free

Guidelines/Suggested Steps

- Define purpose and framework for the project and how it complements overall goal of the peer exchange
- Estimate time and resources needed
- Discuss how the project/project presentation can be integrated into other segments of the peer exchange (e.g. meeting with stakeholders, in-person activities, etc.)
- Outline project strategy and timeline

Things to consider

Peers should be aware of resources and capacities available for the project. There needs to be a high level of commitment from peers to prevent the project from being neglected before completion.

6.5

Example 5 Virtual Peer-to-Peer/ Peer-to-Organisation Training Sessions

Brief activity description

Virtual trainings can provide additional support for capacity building at every stage of the peer exchange. This activity is especially useful if one peer has expert knowledge on a topic their partner is interested in. Peers can tailor these trainings to their own capacities and needs. They can decide whether they want to include team members from their organisations and whether a session should be conducted interactively and in real-time or as a pre-recorded video. Pre-recording provides peers with greater flexibility and allows them prepare or watch the session whenever is most convenient for them.

Table 13
Suggested Tools and Features

Tool	Features	Cost
Zoom & Skype	Popular video meeting tools and easy to use	Most services free
Prezi	For integrating presentations into video calls in a more interactive way than Skype or Zoom	First 5 free
Mentimeter	For real-time input from virtual audience, including live polls, quizzes, word clouds, Q&As	Free
Padlet	• Appealing design options for uploading learning materials and pre-recorded videos • Very convenient if peers do not have the time for real-time training sessions	

Guidelines/Suggested Steps

- Brainstorm topics of interest and fields of expertise
- Discuss the most suitable format for the training
- Conduct training session
- Prepare a short follow-up to make sure all questions were answered, materials were read/watched, new knowledge acquired, etc.

Things to consider

The format of a training session will depend on the peers' preferences and technical skills.

6.6

Example 6 Individual Knowledge Exchange Platform

Brief activity description

An individual knowledge exchange platform for partnering peers can be a helpful tool. In contrast to broader knowledge exchange services, an individual repository of materials can be tailored to specific themes discussed during sessions. It allows peers to build know-how in a structured way, knowing exactly how each material can contribute to the theme of the peer exchange. That prevents peers from spending extra time searching for the right information.

Table 14
Suggested Tools and Features

Tool	Features	Cost
Dropbox	• For sharing documents and working on them collaboratively • Materials can be organised into separate folders	Free
Google Docs	For sharing documents and working on them collaboratively	Free
Padlet	• Offers appealing design options for highlighting and categorising shared content	

Guidelines/Suggested Steps

- Encourage peers to exchange reading materials so they can be well prepared before, during, and after the peer exchange
- Establish a shared document where both peers can tag each other and request materials on certain topics from or ask questions related to uploaded material

Things to consider

- Peers should be committed to sharing and reading learning materials.
- Effort and usage of the platform should be considered.
- It is better to share just one highly relevant document than several less relevant ones to ensure that your partner does not spend too much time finding the right information.

7 Appendices

Guide for applicants

Table of contents

Application Form

Suggested questions

- Personal details (first name and surname, organisation, address, telephone & e-mail address)
- Are you available during this period of time? (please set specific dates for peer exchanges)
- Please provide a brief description of your organisation (sphere of activity, mission, most recent achievements)
- Please provide a brief description of your career path so far, your achievements, and your goals for the future. What makes you passionate about your job?
- How do you interpret the theme… (depending on the theme for the peer exchange).
- Why did you decide to apply for this peer exchange?
- Please briefly describe the area of expertise in which you would share knowledge with your peers.

Context

Each mentor is assigned to at least one pair. The mentor's role is to make sure that peer exchange follows the timeline, objectives, and activities proposed in the initial plan. The mentor is the first point of contact for peers. The mentor's role is to support mentees (peers) both intellectually and practically, and guide them to a successful peer exchange.

Mentor's role

Before the peer exchange starts, ensure that peers have signed the Memorandum of Understanding (MoU) and that they understand the terms & conditions of the project they are participating in:

1. Planning

Planning is the 1st step towards ensuring that both parties understand their role. Together with your peers you should agree on:

- the role of the mentor in the peer exchange (what are the limits of the mentor)
- how often you will meet (choose channel of communication: regular e-mail exchange with additional calls, WhatsApp group, etc)
- what will you do during those meetings (online meetings)
- set up Excel mentor log (where peers will document goals and outcomes during peer exchange week – after each individual meeting day – and use it for reflection).
- ensure that peers are comfortable contacting you if they run into problems, etc.

2. Support

Mentors should be prepared to provide support throughout the project:

- Define clear goals and outcomes for each peer exchange week that will be revisited during the evaluation phase – reflection (see **Appendix 3**)
- Review the timeline (peer exchange week model)
- Suggest tools to facilitate document sharing (Google Drive, etc.)
- Find/connect peers with experts via your network/colleagues, etc., if applicable
- Make sure that the challenge(s) that peers will address are relevant to the theme of peer exchange
- Listen to the peers needs and concerns
- Make sure that the agenda is well balanced in terms of intensity (sufficient breaks and length of sessions)
- Suggest relevant learning activities that fit peers' needs
- Direct peers to relevant staff members for logistical issues
- Provide information about payments/ reimbursements, etc.

The mentor's role may change depending on the formula of a peer-learning programme.

The mentor could take the role of

- facilitator - overseeing the exchange without providing content-related advice,purely assisting with organisational and logistical aspects of peer exchange.
- mentor

There are 3 main features that will shape their responsibilities

- Enabler - you will create space for peers so they feel confident, comfortable, and supported by the programme partners in their collaborative efforts.
- Connector - you connect them with relevant people/stakeholders (through your professional network) who can contribute to the success of their exchange.
- Critical Friend - you are a critical (not judgmental) voice, asking challenging questions that will shift their thinking, encourage them to consider different perspectives, and provide constructive feedback that will help strengthen their approach.

While supporting the peer, it is worth considering the two levels of engagement that a peer faces during peer exchange (those levels are complementary)

Individual

Peers are participating in the exchange as individuals, they will look at their professional expertise gained throughout their individual career. Mentors are welcome to suggest that they share knowledge that revolves around leadership practice, looking at the competencies that peers need to fulfil the vision & mission of their organisation.

Example: Mentor could use the Eu3leader Framework of Competences, developed by the Euclid Network. It is an excellent document that provides an overview of the competencies a leader needs to foster a more entrepreneurial approach. It could be used as a guideline for the mentor to identify gaps between individuals' leadership capacity.

Organisational

The mentor could suggest looking at the tools and best practices/case studies from the peer organisations. When choosing a concrete challenge, i.e. impact measurement, both organisations would map out the tools and achievements in this area. Peer learning will focus on complementing both resources and finding a way to improve it/replicate it that is tailored to each others' needs.

The goal

The goal is to create space for the first round of idea exchange and keep the conversation going until a consensus is reached (allow time and space for peers to engage, this might take a considerable amount of calls and e-mails). The facilitator is only there to oversee the process, the main engagement should come from the peers. An intervention should take place if communication decreases or if there is a clear misunderstanding between peers.

The facilitator can initiate the discussion using:

- brainstorming sessions (online meeting/ call with help of facilitator)
- written exchange of ideas (via e-mail)

The facilitator can help peers with initial steps by:

- suggesting common challenges or mutual interest(s) (as a starting point for the discussion) based on peer profiles or the activities of their organisations
- suggesting that peers give examples of the initiatives they were/are involved in that relate to the common challenges or mutual area of interest.
- identify each peer's interest and see whether it aligns with another peer's expertise

Example: below you can find a table outlining how to identify both peers' areas of work.

Learning Exchange Organisation X & Y

Added value of each peer exchange

- Knowledge about different contexts – political, legal, cultural, and social settings in each context (country and/or regional level)
- Knowledge about different best practices adopted in each context
- Application of innovative practices in one's own organisation, context, or when entering a new context (country, cross-border, region, cross-region)

Appendix 3 Agreeing on the content

Examples of Mutual interest/common challenges between Org X & Org Y	What solution/ tool Org X can offer (best practice)	What solution/ tool Org Y can offer (best practice	Learning outcomes Org X	Learning outcomes Org Y
The use of crowd-solving/ challenges to spark social enterprises and address societal challenges				
Effectively promoting social entrepreneurship as a career, including the language used to attract and interest people				
The best legal framework for social enterprise				
The incubation process for early-stage social enterprises				
The international social enterprise network and community				
The sustainability of social enterprises (financial, environmental, human)				

Appendix 4 Peer exchange week model

Those models are designed for five working days. The facilitator should check with peers to gauge their preferences and organise the agenda according to their mutual needs and interests. However, it is important to strike a balance between individual and collective meetings so peers have enough time to get to know each other and steadily build know-how throughout the exchange.

Day	Model 1	Model 2
Day 0: **(Sunday)**	• Arrival at exchange destination. • Social event: meet & greet and informal briefing with all peers (2-3 hours)	• Arrival at the exchange destination • Informal briefing with peer
Day 1: **Individual meetings (in pairs)**	• Introductory workshop at the host organisation, meeting other team members, getting to know the organisation's mission, vision, and core activities, etc. • Thematic workshop: setting the scene for the challenge you would like to discuss	• Introductory workshop at host organisation, meeting other team members, getting to know the organisation's mission, vision, and core activities, etc. • Social event: dinner with peer
Day 2: **Individual meetings (in pairs)**	• Dedicated activities: deep dive into specific challenge, thematic workshops on the specific topic, etc.	• Dedicated activities: deep dive into specific challenge, thematic workshops on the specific topic, etc.
Day 3: **Individual meetings (in pairs)**	• Site visits • Thematic workshops • Meeting other stakeholders • Attending relevant events • Networking events	• Thematic workshops (individual sessions) • Attending relevant events
Day 4	**Collective meeting** • Thematic training sessions/workshops provided by external expert with all peers • Site visits • Social event: dinner with all peers	**Individual meetings (in pairs)** • Attending relevant events • Networking events • Meeting with other stakeholders related to the host organisation • Cultural event (related to the host's country/region)
Day 5: **Final event**	• Event focused on reflection, sharing first impressions • Building momentum for the upcoming week 2 of peer exchange • Good-bye and departur	• Event focused on reflection and sharing first impressions • Building momentum for the upcoming week 2 of peer exchange • Good-bye and departure

Thematic training

This session will focus on more general knowledge around peer exchange. Here, peers will no longer focus on the concrete challenges. It is a mixture of passive listening and participatory activities. It is most effective when led by an expert on the topic.

Training ground rules

Keep in mind that as adult learners, participants will respond best when they have the opportunity to set the ground rules for their experience. It is helpful to come up with these rules as a group so participants can give input and are aware of the expectations. Below are some sample ground rules and suggestions for how to develop them at the beginning of a training workshop:

- Review the workshop ground rules as a group. They should at least should include expectations about punctuality and not interrupting when someone else is speaking. It is also a good idea to ask all participants to turn off their cell phones for the duration of the workshop.
- Ask participants if they can agree to respect these ground rules. Ask if anyone has any suggested additions or changes to the rules, but do not add to or change the rules unless there is consensus within the group to do so.

Sample ground for training

Punctuality: Arrive on time to each workshop session. Arriving late is a sign of disrespect to the trainer and your fellow participants.

No Disturbances: Cell phones should be turned off at the beginning of the workshop and should remain off until the end, except during breaks. Avoid side conversations – if you are unclear on the topic being discussed or the instructions, please ask the facilitator to clarify.

Respect Others: Respect each other, yourselves, and the trainer. Do not speak when someone else is speaking (one microphone rule). Listen actively. The trainer will facilitate discussions with your assistance.

Participation: You are your own best resource. Much of the content in the training will come from you. Each of you brings a wealth of experience to the table. The workshop can only be successful if it is a two-way process and if everyone participates fully. Give everyone the chance to contribute and encourage others to do so.

Agree to Disagree: During this workshop, everyone must feel free to express opinions and concerns. Please see frank discussions about politics as healthy exchanges rather than personal attacks. We will show tolerance for differences in approach and

strategy. Everyone should contribute to a safe/non-judgemental environment.

Ask Questions: There are no stupid questions. If you do have a question you don't want to ask in front of others, ask it privately during a break. Please do not think any question you have is unimportant.

Give Honest Feedback: At the end of each day, you will be given a feedback form to help make this training better next time. Please be honest! Constructive criticism is appreciated and is the only way we can improve.

Duration

3-4 hours

Example

9:00-9:30 - Introduction
9:30-10:00 - Setting the scene
10:00-10:15 - Coffee break
10:15-11:15 - Expert insights (active listening)
11:15-12:15 - Active exercises with peers
12:15-13:00 - Q&A and closing remarks

Topic

Choose a topic that is relevant to all peers. It can be helpful to look at the results of the needs assessment and identify where areas where there is a lack of knowledge (relevant to the country context).

Expert

- Identify whether the host organisation has in-house experts on the relevant topic
- Look for recommendations from external experts at the host organisation (network of stakeholders)
- Use your own network to identify potential external experts

Session agenda

- Introductions
- "Setting the scene" (context related)
- Expert insights on the topic
- Group discussion (active exercises to engage participants)
- Q&A

Case study exercise

Background

Case studies are a great tool for sharing experiences and broadening knowledge and understanding about the context that peers are operating in. A case study should be presented by one of the peers and prepared beforehand. Peers should choose the real-life scenario that occurred in the past, in their organisation, and is relevant to the theme of peer exchange.

Key features of the presentation

When outlining the real-life scenario, first explain the context and the background of the problem that you will present (background information about your organisation and ecosystem it exists in). Example:

- Context: Association based in Catalunya, Spain

- Type of organisation: Association that focuses on vocational training for young people
- Background information relevant to the problem in the case study: Streams of existing funding

Clearly present the problem. Example: lack of diverse funding sources in the organisation and dependence on public funding

Present the internal or external cause of the problem. Example: shrinking public funding

After introducing your problem, as a part of the activity, you will ask the group to consider the following questions:

- What's the problem?
- What's the cause of the problem?

Group discussion

If the group is small, this is the best way to do this exercise collectively. After identifying key aspects of case study, peers will think about possible solutions. During the discussion, the presenter will actively listen to the discussion and provide necessary guidance to make sure the discussion is on the right track. The solutions proposed by peers will be their own ideas derived from how they would tackle the problem from their own perspective. The presenter will also use the flip chart to document solutions proposed by peers and then add the real solution: how the problem was tackled in real life. What did your organisation to do (i.e. to diversify the funding streams) and outline the step-by-step path to how it was achieved. The discussion is closed out with reflections:

- How could the problem have been avoided in the first place, if at all?
- How and what would you improve the solution that the organisation implemented?
- What are your recommendations for the proposed solution?

Duration

- 45 minutes (per case study)
- 10 minutes for introduction and setup (presentation of the scenario/problem and background)
- 20 minutes for analysis and discussion (group discussion following the questions)
- 15 minutes for final review and case study debrief (presenting the solution and reflections)

Tips for the presenter

- When structuring your presentation, make sure it is logical and presented in a sequence that others can follow.
- Ask yourself if the idea you are presenting is really clear and easy to understand, or does it only make sense to you? Is it easy to interpret?
- Use props (PowerPoint, charts,

flowcharts) to help your presentation.
- When presenting, speak clearly and concisely.

Action Learning

Background

Action learning is the process of aligning thinking and action. Learning is a continuous process and is best achieved with an open, questioning mind and the ability to listen, question, and explore ideas.[2] Action learning offers participants:

- Space for individual reflective learning
- Learnings to take back to the 'office' and translate into action
- Support and challenge from peers
- A chance to test beliefs and assumptions and learn what works
- A safe environment to explore new ways of thinking and doing
- Insight into how others achieve different solutions
- A chance to find new opportunities and develop new ideas
- An opportunity to strengthen peer networks

These three basic ground rules have proved most useful in enabling action learning:

- Only One at a Time
- Counselling Style
- Safe to Admit Need

2 www.actionlearningassociates.co.uk/action-learning/

Session agenda

Depending on the number of participants, the facilitator will divide them into groups of four. Each group will have a presenter and action set members (per round).

Total round duration

Max 25 minutes

Each round consists of

See table on page 58

Facilitator's role - Do:

- Listen and encourage the presenter to talk
- Allow some time after a person has finished to make sure they have said everything they wanted to say
- Attempt to see things from the other person's point of view
- Ask questions that encourage thought and exploration
- Encourage the person to be specific when appropriate
- Support the person by paying proper attention
- Respect and value their uniqueness and capacity to make their own decision

Facilitator's role - Avoid

- Interrupting before the person has finished
- Imposing your own values, views, opinions, advice
- Being judgmental about the person's values
- Criticising, negating, or trivialising what the person is working on
- Making assumptions about their situation

Appendix 5 Activities for collective meetings

	Presenter's Role	Action Set Members' Role	TIme
PRESENTATION	Share their goals and the details of the issue	Listen carefully to the presenter's statements, questions and emotions	5 min
CLARIFY	Provide more information	Ask questions and/or reflect back what they are hearing as appropriate	5 min
COACH		Ask the presenter questions to support and challenge their thinking. Offer insights or relevant experience if asked, but do not offer "advice." This is not a general discussion, but more akin to group counselling or coaching. The aim of the discussion is to encourage the presenter's learning. Members pay close attention, and ask open questions, enable the presenter to get a deeper understanding of the problem.	10 min
REFLECT	The presenter then has a chance to respond – perhaps setting an intermediate goal and outlining next steps and actions towards development objectives.		3 min
CHECK-IN: At the end of all rounds		Members reflect on the session and summarise their views of what has happened. What key learning points stand out from today's session? What questions were most helpful? How could the next round be more effective? Things that went well should be noted and elaborated. They should suggest ideas to improve the process.	5 min

Appendix 6 Evaluation Form

Exchange preparation (1 do not agree – 5 completely agree)	1	2	3	4	5
The methodology of peer exchanges was clearly communicated prior to the exchange.					
The agenda closely reflected the topics/challenges and goals.					
I felt well prepared for the exchange overall.					

How helpful was the Peer Exchange Manual in the development of your exchange? Was there anything that was missing?

Logistics (1 do not agree – 5 completely agree)	1	2	3	4	5
Sufficient information about the meeting places and times was provided in a clear way					
The meeting venue was comfortable					
The facilitator was easy to reach during the peer exchange week					

Individual meeting content (1 do not agree – 5 completely agree)	1	2	3	4	5
The challenge tackled during the individual meetings was clearly set beforehand and reflected in the agenda of the meetings					
The activities contributed to the acquisition or deepening of knowledge of the challenge					
The degree of innovation in the shared knowledge was satisfactory					
I would like to further deepen my knowledge on this specific challenge					

How helpful did you find these sessions? (1 do not agree – 5 completely agree)	1	2	3	4	5
One-on-one sessions with my peer					
Meeting other SE stakeholders					
Visiting local SEs					
Actively working together					
Attending conferences and other events					

Collective meeting content (1 do not agree – 5 completely agree)	1	2	3	4	5
The content was useful and easy to understand					
The methodology was familiar to me					
The methodology was challenging for me					
I find it useful to meet up with other peers during the peer exchange week					
There was enough time to network					

Reflection after exchange – Individual (1 do not agree – 5 completely agree)	1	2	3	4	5
My peer's experience gave me new insights					
I now better understand my peer's specific challenge					
We shared innovative approaches					
I left the exchange encouraged and inspired					
I reflected on my individual approach to my work					

Appendix 6 Evaluation Form

Reflection on the first exchange – Organisation (1 do not agree – 5 completely agree)	1	2	3	4	5
I will share tools and learnings from this peer exchange with colleagues at my organisation					
My peer and I have gathered initial ideas for future collaboration as a result of the first exchange					
I will most likely contact my peer to develop those ideas within 3 months after the programme is finished					
So far (after first exchange), I recognise the benefits from the exchange f or my organisation					

The key objectives of peer exchange

- Exchange of knowledge and best practices
- Increase the capacity of organisations and peers who participate in peer exchange
- Building new networks

Peer exchange process

Phase 1: Selection and matching:
This phase has been completed.

Phase 2: Preparation stage
At this stage, peers will engage with each other, get to know each other, agree on the priorities/themes they will work on together, and plan the communication tools (online meetings) and objectives of those meetings with the mentor.

Peers should now be aware of each other's profile and basic challenges they can potentially address during their exchange week. The aim of this phase is to narrow the focus to 1- 2 challenges that you will address.

Getting started
The mentor will initiate contact between the two peers in a brainstorming session to agree on the peers' common priorities (it's ok if this does not happen in the first brainstorming session, and there is a need for another session to finalise the priorities based on the results of the first brainstorming session). During this session, you will agree together how often to meet (choose channel of communication: regular e-mail exchange with additional calls, WhatsApp group etc), and what to do during those online meetings.

This stage is a learning process for the two peers; online meetings and e-mails will allow for a deep dive into the characteristics of common challenges, opportunities, learning, sharing best practices and tools, inspiration, connections and collaborations, and reflection.

Planning and shaping the agenda for the peer exchange week with the full support of the mentor.

Phase 3: Implementation stage
The exchange week in the host country:

The exchange has two parts
- First part: EU peers will travel to the MENA region for 5 days.
- Second part: MENA peers will travel to their EU peers.

The budget for the peer exchange
- Each peer will receive a budget for the flight
- Each peer will receive a daily budget for accommodation and per diem expenses

The exchange week could include individual meetings (peer-to-peer), collaborative meetings with other experts, training sessions, site visits/study tours,

joint activities involving other relevant staff members, case study exercise, and a final event (learning outcomes and reflection).

Phase 4: Evaluation
Feedback is sought and welcomed continuously throughout the exchange process. Two weeks after implementation of the exchange week, the peers will receive an evaluation form to measure learning outcomes and feedback.

Phase 5: Sustainability
Scaling knowledge acquired by the individual peers to their organisation is the final stage of peer learning. This can be ensured through goals, learning, collaboration, action plan sharing with peer organisations, as well as through some activities such as:

- Post-peer exchange group-based learning for returning peers with other staff members in the organisation
- Involvement from host organisation staff members in individual meetings during peer exchange week
- Creating peer exchange alumni groups could be another way for peers to stay engaged with each other after peer exchanges.

General questions

- To what extend did it give guidance and underpin important aspects that you (as facilitator) should consider when executing peer exchanges.
- To what extend did you put in place your own ideas and tools when executing peer exchanges.
- Did it give a clear structure to peer exchange? Did the exercises and templates serve as a good example?

Questions per section

Content and Tools

- How well did the toolkit help you understand the principles and objectives of peer learning method?
- Are the principles described properly and how often did you come back to them during the implementation phase?
- Did the division into phases help you in planning peer exchanges? Is the division relevant to your process? If not, what would you change?
- Is the description of the consecutive phases described properly, and to what extent did it help you determine which phase you were in during the process?

Matching and Selection

- To what extent did you follow the sequence in this phase?
- Did the selection criteria help you to identify candidates?
- Was the introductory webinar necessary?Did it determine the matches?

Preparation Phase

- To what extent did you follow steps 1, 2, and 3 as suggested in the toolkit?
- How helpful was the structure of the implementation stage? How closely did you follow the suggested structure for the peer exchange week (individual meetings versus collective meetings)?
- How much did the toolkit help you structure your support as the facilitator to peers during the exchange?

Evaluation

- Did you take time to introduce the reflection component during the peer exchange as a part of the evaluation phase?
- Did you use the evaluation form as a part of the feedback?
- To what extent will you engage in post-peer exchange evaluation?

Appendices

- Which appendices from the toolkit did you use during the peer exchange?
- Which of the appendices were useful and which would you skip?
- Would you add more appendices? If so, which ones?

Questions about structure

- Is the structure outlined well in the introduction?
- Is the content easy to follow?
- Is it easy to find ad hoc information in the document?
- Is the length of the toolkit appropriate?
- Are the sections described properly and do they provide sufficient/relevant information?
- Is the language clear and easy to understand?
- Is the table of content well thought out?
- What is the first thing that comes to mind that you would change about the toolkit?

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