

## **Practical advice when planning an exchange of employees**

*By*

*Signe Ploug Hansen at EVA*

*Pål Bakken at NOKUT*

*Magnus Johansson at HSV*

This paper presents advices for good practises in relation to planning and implementation of exchange of employees. The paper reflects experiences gained by three employees, one from HSV, one from EVA and one from NOKUT, who all participated in exchange to another Nordic agency for a two-month period in 2002. The advices must be considered in this context as other advices may suit better for a longer or shorter exchange period or for different forms of exchange.

Good planning is key to a successful exchange. Good planning includes preparations before the exchange and an appropriate programme during the stay, as well as feedback and follow-up afterwards.

### **Preparing the exchange**

It is important that the visitor has some knowledge about the host organisation and that he/she ensures that this organisation really is the right place to go, considering his/her aims and expectations. Therefore it is a good start to conduct a brief study of the proposed host organisation. It is also advisable that “host and guest” hold a meeting/dialogue to discuss the basic conditions and agree on the purpose, content and duration of the exchange.

#### ***Agree upon:***

- Purpose. If possible, try to formulate a question or a problem to solve. Agree upon a “mission”!
- Content. Suggest a comprehensive programme.
- Duration and timing – for how long and when?
- Expectations from both sides concerning the actual exchange period as well as the follow-up and use of the experiences and knowledge gained from it after the exchange period is ended.

Concerning duration and timing, we suggest an exchange period of two months. It is also a good idea to alternate, so that there is only one exchange taking place at any one time. The EVA and HSV exchange started with an employee from HSV visiting EVA during the spring, after which an employee from EVA visited HSV during the autumn. When an exchange is arranged this way, the exchange employees become each others' contacts before, during and after the exchange and they also get a chance to develop a common project or mission. They are also able to share each others' references in order to reach a better understanding of respective organisation.

Other preparations will depend on what you decide on the above. However, in general you will also need to:

#### ***Before going (visitor)***

- Make sure that you actually have the time to participate in the exchange. Do not try to work in two places at the same time. Plan the exchange for a period

of time when you do not have other tasks planned in your ordinary job. Make a realistic agreement with your head of department.

- Also make sure that you have sufficient time set aside to finish your report and to hold a feedback seminar soon after your return to your home office if this is how you experiences from the stay are to be reported.
- Plan how to solve practical problems such as housing and transport.
- Consider if you need a laptop computer and/or a mobile phone.

#### ***Before receiving (host organisation)***

- Appoint one or several employees within the host organisation as contacts.
- Plan and suggest a programme. If the “visitor” arrives around the same time as new employees of the host organisation suggest that the visitor participate in (parts of) the general introductory programme
- Inform, and if necessary prepare, employees of the host organisation.
- Arrange a desk for the guest. Provide access to telephone, e-mail and Internet/intranet. It is a great advantage for the visitor to have access to the intranet and thus obtain information about meeting schedules and meeting notes as well as other information of current interest within the organisation.

#### **The exchange programme**

Of course there is no one programme that will suit all exchanges, but a few general things are worth considering:

The host organisation could begin by suggesting a programme based on the agreement of purpose, expectations and duration. The visitor and the host could then agree upon alterations. The guest may be more or less free to fill the programme with additional activities, meetings and interviews during the stay.

It might be a good idea for the guest to meet with the head of the host department/organisation to discuss formal and informal ways of arranging meetings, interviews and other activities that will take up employees’ time.

#### ***A programme can include***

- A presentation of the host organisation and its main tasks
- A presentation of main on-going projects and/or other relevant projects.
- Time for the guest to go through main documents such as government regulations, legislation and university acts, directions from the board and supervisors, policy documents and documents on quality assurance. Leaving a pile of relevant documents on the visitor’s desk is a good start.
- A specific project to follow. Relevant project plans may be added.
- Time to go through relevant reports (can also be done in advance of the stay).
- Participation in department meetings and other regular meetings of the organisation.

#### ***The guest can add the following to the programme:***

- Meetings to discuss the above-mentioned documents, in order to get a full understanding of them and their actual implementation in everyday practice.
- Interviews with individual employees or groups of employees.
- Interviews with external actors.

- A feedback session.

### **Attending meetings**

Attending meetings is a good way of gaining information. Below, we list different kinds of meetings and discuss the value of them.

#### ***Regular organisation, department or section meetings***

It may be difficult to participate in the discussion if one is not familiar with the topic or the question discussed, but one can still learn a lot about what is going on in the organisation by attending these meetings, for instance: current questions and problems, proposed solutions and practical implementation of instructions and policies. These meetings also provide an opportunity to ask questions about matters upon which there appears to be disagreement within the organisation.

#### ***Project meetings***

These meetings can be more or less formal, but do ask for an invitation when projects you are interested in have formal meetings. If there are projects that are of particular interests to you, it is of course important that you get the chance to follow these as closely as possible. It is a good idea to have at least one such project scheduled in your programme.

#### ***Self-initiated meetings***

These meetings can be suggested by the guest with the purpose of discussing impressions from and interpretations of other meetings and/or documents and reports. After reading major documents, it is a good idea to schedule meetings with employees to discuss the content in order to get a full understanding about how policies and instructions are implemented in practice. Suggest separate meetings with those who are in a leading position.

#### ***Interviews***

As soon as you have gathered relevant questions, ask employees to participate in interviews. Interviews are also useful when you need information about activities in which you cannot participate or observe yourself.

#### ***External meetings***

Attend, if possible, external meetings between employees/heads of the organisation and external actors, for instance, site visits and project group meetings with external experts or consultants. It can also be interesting to arrange interviews with external parties such as people employed by universities or other organisations attached to the host organisation.

#### ***Feedback***

At the end of your visit, give the host organisation feedback on your experiences and impressions. The feedback can be given at a meeting with the whole organisation or with smaller groups of employees who have been particularly involved in the exchange.

## **Points for consideration during the exchange period**

A number of issues are relevant to mention in this respect. Based on our experiences the following points are some of the most important ones to keep in mind:

- Keep focus on your “mission” for the exchange while at the same time allowing other relevant focus points to appear during your stay
- Do not avoid asking “stupid” questions about I’e’ practises that seem strange to you. They ensure that you get the information you need and often even appear to be very relevant as they are likely to “provoke” your host to reflect upon everyday practises.
- Try not to schedule too many self-initiated meetings or interviews at the end of the exchange period. Instead, make it an early habit to ask for a short meeting as soon as you have read or experienced something you think is worthwhile discussing.

## **Practical problems**

### *Language*

Exchanges between Denmark, Norway and Sweden can be done without major language considerations. Exchanges with Finland and Island might require some extra thought on this matter. An exchange may be most suitable when it is possible to follow an international project where the working language is English. An alternative would be to organise the exchange as a shorter stay, with a programme mainly based on individual or group interviews with employees and heads of the organisation.