



**SCOTLAND
FOOD & DRINK
PARTNERSHIP**

A GUIDE TO **DEVELOPING & MANAGING LEARNING JOURNEYS**

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on behalf of the Scotland Food & Drink Partnership



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WHAT IS A LEARNING JOURNEY?

“Simply put, **a learning journey** is when you go outside your business and learn new things that will have a positive impact on the way your business operates.”

Karen Donnelly,
Karen Donnelly Associates



Stepping outside your business on a learning journey, through visiting and experiencing how peers in another location operate, can be a powerful experience for all involved and can be undertaken by one person or a group of participants.

The benefits are many and diverse including:

- Shared knowledge amongst hosts and participants
- Opportunities to discuss challenges
- New collaborations and networking
- Personal growth and confidence
- Increased customer service and satisfaction
- Product development

TYPES OF LEARNING JOURNEYS

There are no rules as to what constitutes a learning journey in terms of how many people, how many days and location(s).

However, there are things to consider and plan to make the learning journey and outcomes as successful as possible.

To help you decide on your learning journey, we have outlined some key elements and best practice for consideration.



STAGE 1: DEVELOPMENT & PRE-JOURNEY

What are your objectives and anticipated outcomes?

Consider what outcomes/results that you would like to achieve.

Maybe you just want to visit one or more businesses to see how they operate; discuss any challenges they have had along the way and identify any potential learnings that you can incorporate into your business or share with your staff. Visits could be for only a few hours, a week, or longer depending on what you want out of them.

On a team learning journey, your aim might be to encourage participants to network with each other and to develop a stronger relationship between team members. If so, a learning journey away from the business/organisation provides a safe environment, breathing space, gives participants the opportunity to relax, find out more about their colleagues which encourages collaboration and product development. The learning journey manager/organiser can also contribute to this by engaging and leading discussion topics.



At the planning stage, you should identify how you are going to collect information and who it is going to be shared with. All participants should know what's expected of them before you start your journey.

For example, will participants create a diary report, be given a topic to report on, create a case study? It is important to consider these factors at the outset to assist in developing your learning journey.



Who is your audience?

At the planning stage you should identify your audience. Will the learning journey be open to all; restricted to members; be subject specific or sector specific? Once identified, this provides you with guidance on developing your programme as well as the application form and eligibility.

Research & selecting your destination

Whether your learning journey is local, regional, UK or overseas it is important that you have researched the area and/or businesses to ensure that there are sufficient examples to meet your learning journey objectives. Do not select a location for a 'great day/days out'.

If time and budget allow, visit the destination in advance, try to meet with a local area representative to gain valuable knowledge from them on the businesses they recommend that your participants meet. It is always worth keeping an open mind at that stage as you may find that some businesses suggested do not quite meet your expectations and, on the other hand, you may stumble over a good example whilst visiting the area. This is something which develops with experience where you get a feel for what will work for your learning journey participants.

Produce a draft programme and budget

Once you have selected your chosen destination, it is time to create a draft programme and budget.

It is advisable to allocate estimated costs against each of your activities including snacks; teas and coffees; lunch & dinner; accommodation; transport costs; any activity/admission costs and keeping a small reserve for unexpected items. Your draft budget should give an indication on the overall cost so you can decide whether your budget covers everything or whether you need to ask participants to contribute to their learning journey. We would always recommend that participants pay a small fee to contribute to costs as this highlights their commitment and recognises the value of such an opportunity.

If you are travelling out of the UK, you may have additional costs to consider in terms of any travel rules and regulations at that time. For overseas learning journeys, we would recommend that from the point of confirming your destination, you ideally build in a six-month lead time prior to travel.

It is not always possible to have a generous lead time but build in sufficient time to administer the project as you will find there can be a lot of chasing up for information from participants and host businesses.



Promotional Materials

Once you're happy with your draft programme and budget you should produce your promotional material to recruit your participants.

You should consider including:

- The objectives and learning outcomes for the trip
- Eligibility criteria
- What is expected of the participant before, during and after the learning journey
- An outline of the programme and, where possible, say that the programme will be tailored once participants have been recruited
- Details of the application process and any deadlines
- Advice on any travel regulations and passport details

A sample programme is shown for your information (see Appendix 2).

As you can see, the programme is broken down into a daily schedule of visits, free time and any case study/report writing time allocated throughout the journey. Wherever possible include website links to the businesses to be visited and to any accommodation where participants will be staying.

A sample application form can be viewed in Appendix 3.

The application should collect all the individual personal information that you require as well as asking the participant about their personal and business objectives. You may also ask participants how they will share their experiences and learnings with others post- trip. The answers to these questions will help you when selecting your participants. We would encourage an open, fair and transparent recruitment procedure. We would also recommend that, where possible, that at least two people review the applications score these against the learning journey objectives before meeting to agree on the confirmed applicants.

KEY ELEMENTS AND BEST PRACTICE TIPS

Once you have created your promotional material and application form, we suggest that you issue this to your networks and, depending on if you are looking to open the opportunity to a wider audience, ask your colleagues to share this as widely as possible. For example, you could share this with other organisations such as VisitScotland, Business Gateway, Regional Food Groups, local destination organisations and any other relevant bodies.

Once selected, the learning journey manager should contact all the successful applicants to offer them a space on the learning journey and asking them to confirm in writing that they accept this space. You may wish to add a clause that, if a participant withdraws from the project, they are liable for any costs incurred on their behalf which are not recoverable by the project. We would strongly recommend that all participants purchase relevant travel insurance to cover them for any cancellations and fees which may become applicable should they withdraw from the project.

The learning journey manager should notify those applicants who have been unsuccessful and ask if they wish to remain on a waiting list, should anyone drop out. Application forms should be shredded when the project is over.



Practical arrangements

Once you have identified your group of participants and any supporting staff you can begin to confirm the arrangements for your learning journey. This may sound obvious, but keep your budget updated as costs are confirmed or change. Lots of small changes can make a significant overall impact if not monitored closely. Things to consider:

- Confirm your modes of transport, if applicable
- Any overnight accommodation
- Costs for breakfast, lunch, dinner
- Costs when visiting businesses such as entrance fees or simply a group tour cost
- Confirm meeting times with businesses, in writing
- Participant passports are valid for the period of travel
- Any pre-travel vaccinations and tests are complete in advance of travel

TIPS

- ◇ Ensure that all arrangements with suppliers are made in writing and that you have a paper trail for all agreed components.
- ◇ If applicable and, when possible, you may wish to ask suppliers for an invoice in advance of your learning journey. This will mean that there are no unexpected additional costs on top of what was quoted or agreed. It helps you to manage your budget more effectively and, if there is any remaining budget, it allows you to utilise this throughout the learning journey by adding extra unexpected experiences for the participants. An example could be an extra coffee, a glass of wine with dinner or adding an additional visit whilst on site in the destination.
- ◇ Keep detailed records of all your transactions with all suppliers. You may find it helpful to create a folder for each day of your learning journey and save all relevant supplier information within this, whether it be an online or physical full or hard copy folder.



Pre-meeting/briefing

Prior to the learning journey and if it is possible, hold a briefing event or online meeting to introduce the participants to each other. This provides an opportunity for everyone to get to know more about the individual and their business and can ease anxiety for those who have not been involved in such a project previously. If this is not possible, we would suggest that you ask each participant to write a short biography (circa 200 words) of themselves and their business and provide a photograph.

This is often helpful if you have not previously met and will meet for the first time at a train station or airport. When on site in your destination and at the earliest, convenient time, the learning journey manager should ask everyone to introduce themselves; you may decide you wish to do an ice breaker scenario however, this is completely optional and again can cause anxiety for some people.

Final programme and guidance to participants

Now that you have your final programme and list of participants, it is time to provide everyone with a set of guidance notes to help them be as prepared as possible for their learning journey. We have found this to be the most effective method to collate all relevant information into one guidance document.

An example of guidance notes for an overseas learning journey can be seen in Appendix 4.

We would suggest that guidance notes include the following contents:

- Fast facts and tips: this could be about currency, customs, Wi-Fi, time differences and so on
- Contact information: you should provide a contact number for the learning journey leader and any supporting staff

TIP

- ◇ We would recommend that you set up a WhatsApp group for your participants to communicate before, during and after the learning journey. Always ask permission of your participants before you include them in the WhatsApp group.



- **Outline what is included within the learning journey for example:**

- Accommodation - provide full details of where participants will be staying along with contact numbers and relevant dates. Confirm with the participant any additional costs that they may be responsible for such as telephone calls, charges to their room and of course any damages during their stay.
- Advise participants if they will be provided with single accommodation or expected to share with others.
- Food and drink: confirm what is covered as part of the project such as breakfast lunch and dinner, tea/coffee breaks. Highlight any costs that the participant will be responsible for such as additional drinks with meals, snacks and any other incidentals.
- Provide details on travel arrangements including departure times, pick up points and expected arrival times at the destination. In addition, provide details on expected arrival times back home.
- Ticketing details should be provided and how these will be issued to participants. If the learning journey includes flights ensure that you provide check in information, baggage allowances, any travel regulations and meeting points at the airport.
- We would always recommend that participants arrange their own travel insurance policy to cover them for any unexpected cancellations or delays which cannot be covered by the project.



Reporting guidelines

Ensure that participants know who to approach should they have any questions or concerns before or during the learning journey. As mentioned above, provide contact details on the leader and any supporting staff for the group.

If your learning journey has been funded by an external body, you may be expected to provide a report or case study about the learning journey and its outcomes. It is important that you outline this to all participants from the outset. Indicate what will be expected from them. This may include things such as surveys pre and post event – we would recommend a survey within two weeks return and a further follow-up around six months after the learning journey; this will provide data on the success of the learning journey and how the participants have implemented any learnings from the project as well as how they have shared their experiences.

If your group is large enough, you may choose to set up ‘Case Study’ groups. Each group can be allocated a particular topic to focus on throughout the visit. In the recruitment stage and within guidance notes, it should be stated that all participants will be expected to participate in the production and development of all case study and report materials.

You should provide briefing notes for participants on the production of the case studies or reports. If possible, nominate someone to be a group leader to ensure that information is being collated and that everyone can express their thoughts and opinions. The group leader should not be wholly responsible for the production and submission of the final report/case study; their role is to ensure that it is in production.

You should allocate time within your programme for participants to work on their reports or case studies as required.

Case studies can be created in a variety of formats: they can be simple written reports ideally with imagery or they could take the form of video, of podcasts or a combination contained within a PowerPoint presentation. It is important that reports and case study materials are written and created for a wider audience to share the experiences of the learning journey.

Examples of case studies can be viewed at:
karendonnellyassociates.com/case-studies

You should allocate time within your programme for participants to work on their reports or case studies as required.

TIPS

- ◆ If reports/case studies are to be completed post trip then set a deadline for materials to be completed. It is very easy, when returning home, for these important outputs to drop in priority lists.
- ◆ You should ask that if anyone has any learning difficulties or needs that they should make this known to the learning journey manager.

Suggested Kit

It is extremely helpful to suggest items that participants may wish to take with them for the visit. Do highlight if something is critical and required as opposed to a suggestion.

Suggested items could include:

Camera	Swimwear, if applicable
Tablet/laptop/phone	Hiking shoes
Battery chargers	Sunglasses
Raincoats/jackets	Sun lotion
Umbrella	Insect repellent

It really depends on the contents of your programme. The more information that you can provide at this stage will result in fewer questions over the coming weeks...

In terms of the weather, it is almost impossible to forecast these days, no matter where you are visiting. We would suggest that you can provide a weather link and would generally advise participants to allow for layers of clothing.

Advise whether you require casual smart casual or any formal clothing. If you require formal clothing for an event, then please give as much detail as possible to your participant. Similarly with footwear suggest comfortable shoes or if a particular type of footwear is required again notify accordingly.



Goodie Bags

Whilst not expected, it is a welcomed gesture if participants can provide a small souvenir gift from their business or destination to present to the people, they meet within the host destination. Do be aware if travelling overseas of any customs restrictions – there are often restrictions on food and drink.

Behaviours

It is worth mentioning to participants that for the sake of the group, the businesses being visited, that everyone:

- Is punctual to arrive ready to go as requested
- Follows any health and safety restrictions that may be in place
- Be courteous to those taking the time to meet and present to you as well as fellow members of your group

Full detailed guidance notes will make the organisation and management of your learning journey more productive and successful.

TIPS

- ◇ If possible, the learning journey manager should indicate the maximum number of gifts required for the visit. If a participant can provide small bags, it is a great idea to combine all gifts into ready-made goodie bags to handout throughout the trip. Gift examples could be pens, postcards, recipe booklets, fridge magnets, poems, badges. Food and drink gifts are always welcome but do check custom regulations if you are travelling overseas.
- ◇ It is not always possible for every business to have a souvenir gift to put into the goodie bag nor perhaps provide large supplies and it should be made clear that this is ok, it is not obligatory, and you do not want participants putting themselves out of pocket to go purchase souvenirs.
- ◇ If you are working within a group then you may ask for a volunteer or allocate someone to collate the details of the gifts being offered and take the responsibility to coordinate the production of the goodie bags and their distribution.
- ◇ During the learning journey, you may agree that each participant can present a goodie bag to a host business and create a brief photo opportunity.

STAGE 2: DURING THE VISIT

Each day, keep participants informed on the activities of the day along with any important information on where and who they will be visiting, if they need to bring any special kit and are fully informed on all departure times.

If you have created working groups, it is important that the learning journey manager is available to oversee the groups and ensure that everyone is having the opportunity to be involved and be an important part of their working group.

Everyone should have the opportunity to share their knowledge, ask questions, share challenges and seek advice from their peers. The learning journey manager should facilitate the environment for this to happen. If there are any issues with group dynamics the learning manager can act accordingly to resolve this.

When visiting host destination businesses, it can be helpful for participants to have some questions ready at hand. This often helps conversations to develop when people may initially be quiet and hesitant to speak. The learning journey manager can support discussions by asking questions of participants to share their experiences with the host business.

If you are creating case studies and wish to interview, film, or record a host business please ensure that you ask their permission in advance. Do not be offended if the business does not wish to be recorded. You should also check before taking any photography or video on business premises that they are happy for you to do so and to share post-event.

The learning journey manager is responsible for the time keeping element of the programme and may require to bring visits to a close even though participants are fully engaged. This is a necessity when you are moving on to visit another business and they are expecting you at an arranged time. If you are delayed, then please call the next host business to advise this; always be courteous.

TIP

- ◆ **The learning journey manager can ask permission for filming photography in advance of the visit if it is known that this may be required.**

On the rare occurrence that a visit finishes earlier than scheduled or a business cancels unexpectedly last minute when you are in the destination, there are always a couple of things you should have up your sleeve. Examples could be:

- In advance of your learning journey, research some additional businesses within the host destination that you were unable to include in your programme. It is always worth giving them a call, explaining who you are and what you are doing. Ask if they would be willing to meet with your participants or at least, be happy for the group to come and have a look around their business. Businesses are generally happy to accommodate this.
- If, however, you cannot find a replacement business whilst you are travelling on site then take the opportunity to sit down with the participants and pose some questions about their experience to date, raise a topic or challenge that people are often faced with and facilitate a discussion around this.
- Lastly, you can always use any spare time to develop reports and case studies as well as giving people a bit of downtime to catch up with their families and friends at home or catch up with their office.

The learning journey manager should be flexible and adaptable to any given situation. Be prepared to deal with situations such as last-minute programme changes; delayed transport; participant illness; loss of tickets or passport and assisting in arranging early departure. The list is endless, however extreme situations are rare.



STAGE 3: POST-VISIT

Participants should be supplied with an evaluation survey within two weeks – one month from their return. This data is helpful for organising bodies to evaluate the success of the learning journey and to learn lessons for future projects. There is nearly always something that can be done differently or better so this analysis can be extremely beneficial.

If you are reporting to a funding body you should build relevant questions into the survey perhaps even benchmarking from the initial application form when you asked about individual business and personal objectives – by revisiting these questions you may gain valuable information for you and for your participants, as they may not consider this otherwise. In addition, we would recommend a follow up survey between three to six months after the event. This will provide additional analysis and learnings which have developed since the return and completion of the project. Sample surveys can be seen in Appendices 5 and 6.

Participants should be encouraged to share the learnings and their experiences within their own business, their networks and with any relevant groups. Create blogs, newsletter articles and social media posts to share the knowledge gained.



TOP 10 TIPS

- 01.** Identify your destination/location(s) and your audience. Wherever possible, seek advice from someone within the destination/location to give you detailed assistance when planning.
- 02.** Develop clear promotional information and the application process. Outline what is covered within the learning journey, any participant cost and expectations of the participant.
- 03.** Involve at least two people when selecting participants and ensure the mix meets your eligibility criteria and objectives.
- 04.** Develop your programme and budget to ensure you have sufficient resources for what you want to do. Keep on top of the budget!
- 05.** Give yourself as much time as possible for planning and making practical arrangements.
- 06.** Get all quotes and agreements in writing.
- 07.** If overseas travel is included, ensure that all participants have valid passports, meet any travel restriction requirements and have a travel insurance policy.
- 08.** If developing case studies, select group leaders to oversee progress.
- 09.** At all times, the learning journey leader should be available to support and mentor participants.
- 10.** Enjoy the visit and ensure that all learnings are shared as widely as possible!

RESOURCES

Appendix 1:

[Learning journey budget example and template](#)

Appendix 2:

[Sample week-long learning journey programme](#)

Appendix 3:

[Learning journey application form](#)

Appendix 4:

[Sample preparatory guidance notes](#)

Appendix 5:

[Survey learning journey feedback form](#)

Appendix 6:

[Final survey evaluation form](#)



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