

2.3 Coordinating the Link



In this Chapter:

- Establishing a Link Committee
- Communication
- Record keeping
- The Link Induction Pack
- Developing a Memorandum of Understanding
- Registering as a charity
- Managing and transferring funds

If a Link is to make an impact and create change it needs to be well coordinated and managed. Getting the right systems in place at the beginning is a good investment. This Chapter considers these important elements:

- **Having an effective Link Committee in each partner organisation**
- **Working in partnership to establish good methods of communication**
- **Building up the work of Links to create an organisational memory**
- **Having effective and transparent systems for managing funds**

Colour coding has been used throughout the Manual to highlight the sections which are most relevant to each:

-  green for the UK
-  and yellow for the Developing Country (DC) partner.

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Establishing a Link Committee

Formation: Link committees tend to form more easily in the UK organisation as the UK partner often takes a lead on fundraising, without which the Link would have difficulty operating. But if the Link is to be demand driven, then it is vital that the DC organisation has a Link Committee or an effective co-ordinator who communicates regularly with the UK team. The Link should have a core group of people (ideally more than 4) in both the UK and the Developing Country (DC) organisation who oversee and drive the work of the Link forward.

Communication: Regular communication between the two Link Committees - either through the designated Link coordinators or the group via e-mail - is vital to ensure a healthy Link. Link coordinators/ committees should aim to talk regularly to update each other on progress against agreed plans.

Involvement: Some Links choose to have a small committee drawing on volunteers from outside the committee to carry out specific activities (e.g. visits overseas, fundraising and publicity). Other Links have larger committees, ensuring that all individuals who take part in overseas visits become active members of the committee. The latter model ensures the Link management is inclusive and those involved in visits can continue to contribute to other activities. It also helps the Link to become organisationally owned and less susceptible to staff turnover. The Link Committee should feedback to the wider organisation at least once a year to show progress and encourage

ownership of the Link among colleagues and patients (the community).



EXAMPLE

Members of a UK hospital Link Committee

It is important that the **senior management** of the hospital are involved as well as medical, nursing, academic and administrative staff.

Enthusiastic individuals can be recruited to supervise particular activities such as fundraising, publicity and finance. Possible composition of the steering group:

- Links Coordinator
- Medical Director/Board member
- Clinician
- Nurse
- Fundraisers
- Treasurer
- Post-graduate Dean (if it involves a medical school)
- Influential lay person / community leader

As the Link grows it might be useful to divide the team up into different sub-committees with separate responsibilities, for example:

- **Work stream leads** - taking forward each of the identified objectives of the Link
- **A secretary or knowledge - management group** - who ensures that records are kept up to date, people have clear terms of reference and give feedback after visits; who produce a briefing pack, etc.

- A fundraising team who take the lead on raising funds (see Chapter 2.9 for further information)
- Monitoring and Evaluation group
- Equipment team - if books and equipment are an important element of your Link
- A communications committee - maybe from the communications department within your trust who can be in charge of publishing articles, producing posters and generally raising awareness of the Link (may only be relevant to UK)



GOOD PRACTICE

Raise awareness and get people involved

- Have a public meeting and talk about the Link. You might want to ask for a short time slot at a meeting which has already gathered people together for another purpose.
- When people are involved in overseas visits, invite them to become part of the Link team as their knowledge will be very valuable.
- Find an opportunity to talk about the Link at a postgraduate weekly meeting and invite people to get involved or donate.
- Invite people to take part: maybe advertise for particular roles and responsibilities within the Link team.
- Use staff newsletters and other information outlets to keep the wider community informed.

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Communication

The importance of good communication between Link partners cannot be overemphasised. Communicating between visits is very important, whether this is to provide feedback on a previous visit, plan for the future, discuss issues, or

provide support through mentoring. If communication breaks down, it can cause one or both partners to become disillusioned, perhaps suspecting that the other partner has lost enthusiasm for the work. A lack of communication can also be an excuse for inactivity for those who

let other priorities take precedence. Both the UK and DC partners need to make an effort to regularly communicate with each other. The following table provides examples of methods you can use to communicate.

MEANS OF COMMUNICATION	THINK ABOUT	TIPS
Telephone	<p>In the UK most people use a fixed telephone line in their office but in many DCs mobile technology is more effective. Exchange the numbers that are the easiest to use.</p> <p>Agree in advance with your organisation if they will allow you to make long distance calls as part of the Link, otherwise opt for a different method. As long distance phone calls can be expensive, you may decide to use other methods of communication.</p> <p>If there are important issues to discuss involving several people and if your phones have a loud speaker, you could think about arranging a teleconference.</p>	<p>UK When calling from the UK you can get cheaper phone calls by using an access code company. Check out the best rates for the country you are calling by putting cheap international calls into a search engine. Alternatively you can buy a calling card offering cheap calls, or even better, use Skype.</p> <p>To make an international call dial '00' or '+' followed by the country code. Sometimes you need to drop the first '0' of the number.</p> <p>DC DC making calls from a DC to the UK can often be more costly than vice versa. If you need to discuss something urgently with your partner, ask them if they might be willing to call you back. Agree a time and day convenient to you both. If you are unable to make international calls let your partner know and agree on a better method of communication.</p>
Skype or instant messaging	<p>If you and your Link partner have a good internet service, you may be able to use systems like Skype which allow you to talk to each other over the internet free of charge.</p>	<p>See www.skype.com to download the programme and see the necessary requirements.</p>
SMS/text message	<p>Mobile technology is proliferating throughout the world and text messages (SMS) via mobile phones can be a cheap, easy and quick way of relaying a brief message to your partner.</p>	<p>If you have sent an important e-mail or are about to courier a document to your Link partner and need to confirm the address, send an SMS to make the recipient aware of this.</p>

Continued on following page...

MEANS OF COMMUNICATION	THINK ABOUT	TIPS
Email	<p>Email is often the communication method of choice in the UK. You may even find people working in the same office communicating via email.</p> <p>If it is checked regularly, email can be useful for sending quick messages and longer documents with attachments.</p> <p>However regular access to a computer and the internet may not be easy in some environments, so before relying on it as a method of communication check that your partner has regular access to it.</p> <p>In DCs, broadband is not usually available. Connections may be slow or unreliable.</p>	<p>UK If you are sending attachments make sure they are compatible with your partners' computer. For example if you are sending a word document and using Microsoft Office 2007, save it in an .doc version so that it can be opened with older software.</p> <p>Be aware that attachments can take a long time to download. Where possible, minimise the size of attachments or avoid sending them by including information in the body of the email instead.</p> <p>DC Viruses can also be a problem when receiving emails. Make sure your computer has an updated anti-virus programme.</p>
Fax	<p>Fax can be useful to send documents if there is a well functioning phone line. You may want to send a printed copy of an email by fax as well to ensure that it reaches the designated person.</p>	<p>Ensure that you get a delivery report to confirm that it has reached the fax machine it was intended for. Fax numbers are dialled in the same configuration as telephone numbers.</p>
Postal letter	<p>You may wish to use 'snail mail' when sending important documents, if a signature is needed (e.g. MOUs), photographs, or just to double check that your partners have a physical copy of any document you have sent using another method.</p>	<p>Remember that postal services can take some time to reach their destination, and allow three to four weeks if you are using a normal service.</p> <p>If it is urgent you may want to use a courier such as DHL who will be able to guarantee when it gets there by. Note that these services can be expensive.</p>



GOOD PRACTICE: Teleconferences

Regular communication between Link organisations is very important, especially if the Link has received project funding. Teleconferences can be an effective way to do this.

After securing funding from DFID's DELPHE scheme administered by the British Council, the Oxford-Dar Link needed to find an effective way to communicate regularly with each other. "We have made weekly teleconferences a key activity for keeping the project going", says Petronella Joy Mwasandube from Ferndown. Project leads from the UK and Tanzania dial in to a set number.

"Our teleconference usually last for an hour. This gives all project leads equal opportunities to discuss, participate and update others on key activities as well as question and agree the way forward. Teleconferencing has proved to be an excellent way to enhance learning and exchanging of ideas and keeping the momentum going."

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Record keeping

Keeping good records is important for organisational memory (remembering what has happened in the past). This in turn is important to avoid duplication and to ensure that new members of the Link know what has happened before their involvement.

Both the UK and DC Link partner should have a folder that is dedicated to the Link and holds the same documents. If you have a meeting and produce minutes make sure to share these with your Link partner. Equally, visit reports should also be shared. The items that your Link folder might contain are:

- Initial correspondence about the Link
- What you have agreed the Link will do. The aims, objectives and activities of the Link
- Any changes or additions to original plans
- Minutes of meetings from both the UK and DC partners
- Visit reports: focusing on activities, outcomes and follow-up from both the UK and DC partner
- Minutes of any Board meetings or presentation about the Link
- Any policy documents / preparation packs for staff travelling with the Link
- Name and contact details of the key people who are involved
- The signed MoU of the Link



REMEMBER!

When corresponding by letter or email send a copy to more than one person from your partner organisation (and copying in your own colleagues too) so that everyone has a record of the communication and it does not end up in an information bottle-neck.

The Link Induction Pack

A Link Induction Pack which provides practical planning information when visiting partners is a vital briefing document. Ideally both UK and DC partners should have their own Induction Packs which are built up over time. This will ensure that Link participants are fully prepared for their visit.

The information in Chapter 2.4 and 2.5 provides specific suggestions of areas which should be addressed in the Induction Pack so cross-refer to these Chapters when developing Link Induction packs. The broad areas you may want to include are:

- The purpose of the Link, what it is trying to achieve and a copy of the latest plans.
- Information about the health sector in the partner country.
- Reports from previous visits, what was done and what was agreed (this will help people to avoid duplicating what has already been done or contradicting what has already been agreed).
- Background of the country - information on the history, geography, politics of the country or local area.

- Advice on planning before you go, including tips on what to pack, booking your flights, immunisations and prophylaxis etc.
 - What to expect - helpful tips and advice on facilities, climate, costs of local items and services, cultural differences etc. Photo albums and video-clips are very useful.
 - Who pays for what. What expenditures are covered by the Link and how claims should be made.
 - What to do in case of emergency.
 - Who's who in the partner organisation, including management and all those who have been involved in Link work. Include their contact details.
 - Other useful contacts. You could include contact details of other hospitals or doctors in the area, embassies, international NGO's, UN and WHO representatives.
 - Key phrases in the local language - perhaps ask one of the Link partners or a member of staff who has already been on a visit to put together a list of useful phrases to learn.
 - Risk assessment policy documents and health and safety guidelines. (See Chapter 2).
- But don't reinvent the wheel - ask if you can see the Induction Pack of another UK Link partnered with the same country, and adapt this as necessary.

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REMEMBER!

Give those involved in Link visits a chance to contribute towards and update the Induction Pack after each visit.

Developing a Memorandum of Understanding (MoU)

It is good practice to devise an MoU between Link partners which defines some of the broad principles within which you agree to work together.

A clear MoU sets out the parameters of the relationship and makes it clear who is responsible for what. It will aid those involved in managing and implementing the Link. The MoU should be a living document which is regularly reviewed and updated by both parties. An MoU could be drafted during the initial planning visit but it may be better to refine it and sign it when the partnership is better established.



FIND OUT MORE

Refer to Appendix 6 for a sample MoU.

Registering as a UK Charity

Some Links choose to register as a charity in the UK. Some of the main advantages of being registered as a charity are:

- Tax relief on donations
- Being eligible to receive funds from a wider range of grant-making trusts
- Increased legitimacy

However, registering as a charity can be a complicated and bureaucratic process which doesn't end here. Once you have registered, there are strict guidelines around governance and management which need to be adhered to. Every charity has to have a governing document that sets out its objects and how it is to be administered. A charity which is set up as a Trust will also need to have a Board of Trustees.

UK

FIND OUT MORE

A charity is a not-for-profit organisation that undertakes activities which contribute to society and is registered by the Charity Commission, which acts as a regulator. Once registered, all charities have to obey a number of rules, which include regulations covering trustees, accounts, finances and management. The Commission now offers an on-line application service, introduced to make the whole process quicker and easier. Further information can be obtained from:

www.charityfacts.org
www.charitycommission.gov.uk

Making the decision whether to register your Link as a charity will be a case of weighing the financial advantages associated with charity status against the administrative disadvantages. The benefits of charity status are mostly financial (i.e. claiming tax back on donations) and this will depend on the size and budget of the Link.

"I would advise Links to register as a Charity as soon as it is apparent that the Link is feasible and sustainable"

Dr Cath Taylor,
Pont-Mbale Link.

Some NHS and university organisations however, may be opposed to staff members becoming involved in work-related charities. Charity status could result in the Link being perceived as something separate and not embedded in the organisation. Your organisation may already have charity status and support as well as a number of individual projects which the Link could also become part of, without the need to register as a separate charity. You will need to make the decision according to the individual circumstances.

Managing and transferring funds

Any funds raised for Link activities need to be kept in a bank account. If you are applying for grants from larger donors they will want to see evidence of your banking and accountability procedures so it is good practice to establish effective systems from the start, even when the amounts you are managing may seem small.

Most Links find that it is the UK partner who manages the bulk of the finances (as this tends to be where money is raised). The UK partner makes transfers overseas when needed. Some Links have their own designated charity bank

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account for the Link and others ask the finance department of their organisation to manage the funds. If you manage funds through the NHS, fundraising and financial management should be carried out in accordance with both national and local NHS policy and local Standing Financial Instructions and Standing Orders. If you set up a charity account, the

Charity Commission sets national rules (www.charity-commission.gov.uk) and the National Council for Voluntary Organisations can also provide advice. Whichever approach you choose, ensure that you have transparent systems and provide a regular summary of accounts to both Link Committees. Be aware of the financial risks of fluctuations in foreign exchange rates when holding cash in foreign currencies.

UK

GOOD PRACTICE

Transferring funds to the DC partner

- Before making a transfer, agree a budget that shows how the money will be spent. This should be split into budget lines relating to individual activities.
- Money should be sent according to the agreed budget.
- Transfers can be made to the DC organisation bank account (although some accountants don't like this as it looks like there is more money coming in to the organisation which may displace other government funds). Find out if there are other bank accounts for donations that can be used and ensure that it will be easy to withdraw the money before making the transfer. Avoid transferring funds to an individual's bank account as both parties will be criticized for this and it may raise suspicion.
- If the Link needs to open its own bank account, ensure there are two signatories on the account. Ideally one of whom will be directly responsible for the day-to-day running of the project and the other person will be overseeing the work. Both persons should be affiliated with your partner organisations. Banks may make charges, so ensure you are notified of these in advance.
- Remember to keep statements, transaction sheets and all receipts so that you can compile accurate financial records and account for funds you have been given.



CHAPTER CHECKLIST

- ✓ Establish an effective Link Committee to manage the Link within each partner organisation.
- ✓ Find appropriate methods and lines of communication.
- ✓ Keep good records for your Link and make them accessible to all those involved.
- ✓ Create an Induction Pack for visits to your overseas partner which is updated regularly.
- ✓ Develop an MoU between your two organisations to formalise the Link.
- ✓ Ensure effective and transparent management of funds.

Photograph (right): John MacDermot, Somaliland



**Health leaders of tomorrow
- trained with the help of
repeated Link visits.**