

Peer Consulting

Peer consulting is a methodology Synergos uses to maximize the impact of the network on individual projects of the members.

Since Synergos works with leaders of business, philanthropic and civil society organizations, each network member brings to the table a set of experiences, knowledge (know-how), ideas, methodologies and development models. They also have solved organizational challenges and worked with partnerships on various levels. Additionally, they bring a network of connections – vast social capital that they put to use every day in their work.

The peer consulting consists of three parts:

1. Case preparation (template attached)
2. Consultation (Instructions attached)
3. Follow up on the next steps and learning from the session.

PEER CONSULTING SESSION

Fellow Name:

Country:

Organization Name:

Challenge or Key Issue you seek advice on (please state in two or three sentences)

Example: To engage the Board of Directors beyond general meetings on matters including external relationship building, identifying growth opportunities and strategic planning.

Try to formulate the specific question(s) (not more than two) you are looking to answer during the advising session:

Current Situation & Background of organization (No more than two paragraphs)

Example:

- It's been three years since the Board last took stock of its context and direction.
- There has been quite a bit of turnover. In the last 12 months, four Directors have departed. Five remain.
- My organisation doesn't need a big Board but we do need an effective Board. We should make sure Directors understand their role and contribution.
- I've done the start-up and wish to step down from my organisation soon. I will be resigning as CEO in late August. I've expressed my wish to join the Board upon my return in 2005.

Issues to Keep in mind (No more than two paragraphs)

Example:

- Time to move the foundation out of the establishment phase into growth.
- Charge the incoming Chief Executive with clear goals and targets.
- My organisation's internal operating environment is under pressure and demanding.
- My organisation's external environment is highly politicised and mainstream interactions are influenced by stereotypes surrounding local affairs.
- My organisation has pioneered social venture capital: now is the time to assess and celebrate successes.
- The new CEO will have a clean slate for operations, programs and staff hire/fire.

Requested Advisor Skills/Knowledge

(Please list the skills and knowledge that your Advisors should possess)

Conclusions and highlights from the discussion

(To be completed after the session)

Next steps

(If applicable, to be completed after the session)

PEER CONSULTING INSTRUCTIONS

We have one hour for the consultation. (times can be adjusted depending on availability)

Each group should pick one person who is the time-keeper.

10 minutes The case presenter will say again the question and explain the details of the case: background information, whatever they think you should know to help find the answer. During that time you don't say anything. Just listen carefully until they are done talking.

10 minutes One of the advisors should try to summarize what they heard. Others can add to it. After they finish there is time for clarifying questions. Ask the questions you need to better understand the situation.
Do not give advice in this part. Only ask questions.

25 minutes Only the advisors speak. The case presenter listens and takes notes, but should not participate in the conversation. Divide the time equally so that each advisor gets to speak.

Suggested questions for the advisors (You do not have to answer all of them)

1. Is there another way to define this question?
2. Have you dealt with a similar situation before? If so, what were the steps you took and what was the outcome.
3. What step or steps would you recommend?
4. Are there other resources (knowledge, organizations, coalitions, funding sources) that the presenter should know about?
5. Are there other people you know the case presenter should meet who would help with the challenge?

15 minutes Case presenter summarizes what they heard from the advisors. If anything is unclear, the case presenter can ask questions.