

Everything that can go **wrong** with a Greenlight implementation if you haven't done your homework.

Everything that can be done to make sure a Greenlight implementation goes **fantastically** well.

Resources

❌ If you don't have enough resources to do the surveys, you will lose credibility and momentum.

✅ Start small. Start with a pilot of 30 or 50 or max 100 families/people. Make sure you plan properly and use the right kind of facilitators to do the surveys. Make sure you leave people with scorecards or return later with their printed Greenlight reports – they love the photographs and need time to reflect on the results.

Planning and Follow-Through

❌ Budgets can get out of hand if you haven't planned properly and communicated through-out the process

✅ Set a realistic budget for what you want to do and don't try to do Greenlight with too many families/communities when starting out. Choose carefully why you want to work with a set of people and rather ensure that you pilot the activity and prove the concept. This will help with management buy-in and further funding.

❌ Lack of follow-up and follow-through, i.e. you don't set action plans with the families and you don't provide a follow-on programme around 1 or 2 indicators. This creates reputational risk.

✅ Have an upfront strategy and follow-up meetings. The Greenlight tool is NOT the solution but a catalyst for change and a metric for impact assessment. The magic lies with a good programme. Make sure the Greenlight results tie in with your programme and that the actions plans that you set with families are realistic.

❌ Rushing the process because you are running out of time.

✅ Don't rush the process! You will wish you hadn't later on when you see the results. Take your time to plan properly and follow through. This makes all the difference to how well you will be able to integrate the results into your programme.

❌ Sluggish response from orgs after surveys have been completed and long time period between surveys and programme activation – leads to frustration of beneficiaries and increased distrust.

✅ Be ready for quick activation and changes in perceptions / worldviews from your beneficiaries. If they are motivated and want a better quality of life for themselves, you will need to be quick to keep up with their desire for engagement.

❌ Families can become frustrated if there is no assistance offered to help them move from red and yellow to green.

✅ If you do not have the capacity or expertise in a particular area, reach out and look for partners who can help. Establish collaborations and partnerships in the Greenlight Movement with other orgs who you can trust to deliver a good solution.

❌ Organisations try and solve all the reds and end up burning out or failing in their efforts to do it all.

✅ Pick a few indicators that are showing red/yellow, where you have capacity and competency to assist with, and plan to assist beneficiaries with these ONLY indicators! You cannot be all things to all men. Be clear within your own org about the impact you are trying to achieve and make sure your efforts are aligned with the need that is being voiced through the surveys. It also helps the Greenlight Movement to know what resources are already available in the community.

❌ Using the Greenlight tool to only map a community without follow-up programmes leads to a serious break-down in potential relationship Greenlight – distrust, dashed expectations, feelings of hopelessness, helplessness and anger.

✅ The Greenlight tool is a relational tool which creates expectations – use it as part of an integrated approach. Always follow-up with a series of activities or a programme that is designed to work on assisting families to move from red and yellow to green for a set of indicators. How can you change or re-design your programme to include assisting these families to find solutions or opportunities for themselves?

Communication

✘ The Greenlight approach is not clearly understood by everyone in the organisation.

✘ Greenlight gets lost within an organisation because no-one is driving/owning it.

✘ If the Greenlight implementation is badly planned or rushed it will result in lack of support and/or funding from the Board.

✘ Not enough communication with beneficiaries/clients/employees causes lack of trust.

✘ If you are not aware of community dynamics, you may have to start all over again within a community because you didn't get "permission" or engage with community leaders.

✘ Clashes with the community and lack of clarity around intent:

- Who are you and what are you doing here?
- Do you have permission?
- Why was my family left out?
- We don't understand why you are doing this.
- What will we get out of this?

✔ Set expectations from the beginning and make sure everyone is speaking the same language – the language of impact. Greenlight is a means to an end; it is NOT the end in itself!

✔ Like any particular strategy and plan, someone should own it – Greenlight needs a champion in your organisation, especially if you have many departments. This person will be very useful in making sure the results integrate and tie in with all programme objectives, which is great for reporting purposes.

✔ Senior management buy-in is crucial. Don't treat Greenlight as just another "plug-in" to your set of tools. It has deep consequences for how your organisation sees itself and is able to evidence impact. Make sure management provides you with support and funding to do Greenlight justice – the results are worth it. It will end up changing your workplace culture.

✔ Start with an activity or a session that builds trust so that they are open and receptive to the Greenlight survey when it happens.

✔ It's hard to know when to go through proper stakeholder engagement in a community (which can take a long time) or to deal just with the families you are interested in. Get to know the community first, which will provide direction.

✔ Buy-in and trust from families and beneficiaries is an on-going process. Whether working from a set programme or within a community, the following is important:

- Introduce facilitator and their role in survey process
- Use simple and clear language to introduce Greenlight and explain what it is and isn't
- Explain process as well as what will happen with survey data
- Clarify why households were selected
- Engage with expectations, e.g., no handouts involved

Facilitating The Survey

✘ Families show little response during survey – overwhelmed by the process or the findings and become frozen.

✘ Facilitators who have not been officially trained in the Greenlight approach or who lack credibility/sensitivity can damage the process before it's begun!

✘ Getting confused between the facilitator role and the coaching role in the Greenlight process can create confusion.

✘ Volunteers are often unreliable and don't have the mind-set required to properly conduct Greenlight surveys, which can lead to unreliable data.

✘ Sending in facilitators from a different culture to do surveys can result in families not disclosing honest answers because they fear judgement.

✔ The survey process can be a wonderful or a really scary experience. Having the right kind of facilitators with strong backgrounds makes all the difference as they will put families at their ease and bring out the right kind of responses. Always leave their Greenlight scorecards behind – this allows families to engage with their results at their own pace and to start family discussions.

✔ Select facilitators who are a little older and experienced and who can hold the families in a "safe space" during the survey. Make sure facilitators are the kind of people who are strongly empathetic without being 'rescuers', curious, non-judgemental, understand how to handle confidential info and are good listeners. And of course, emotional intelligence is everything!

✔ The facilitators are trained to conduct surveys and to bring back both quantitative data (the survey) and qualitative data (a story about what's happening in the family). Coaching skills are used to access deeper info to ensure the answers are 'honest' but at no time is advice or recommendations provided during the survey. Coaching skills are used at a later stage when families put together their action plans based on their Greenlight results.

✔ If you are going to use volunteers, make sure they are of a calibre that reflects your organisation - would you be willing to be interviewed by this person? Don't take short-cuts just because people are 'available' to be used. Make sure there is a relationship between your organisation and your volunteers, or they may not show dedication and commitment to the process.

✔ Be sensitive and realistic – sending in a white person to conduct a survey in a black household has proved to be uncomfortable and often doesn't

- ✘ The language barrier can hamper the survey process by creating misunderstandings, resulting in data that is not reflective of the family's situation.
- ✘ Facilitators fear for their safety.

bring back honest answers. It is what it is. Make clever choices to get the best out of your survey data.

- ✔ There Greenlight surveys are available in 10 languages. Make sure the facilitators carry these paper versions with them to assist with the process. They will be available soon on the app.
- ✔ There is no substitute for taking precautions. Every facilitator needs to be aware of the community they are entering, the environment and safety risks, as well as local/current events. Having a charged phone, list of emergency numbers, knowing where the police station is, not wearing flashy clothing or jewellery, walking in pairs, and treating the community with respect will mitigate many risks.

Confidentiality

- ✘ Lack of confidentiality at all stages of the Greenlight process can create a nightmare regarding issues of trust as well of breach of laws (e.g. POPI Act).

- ✔ Non-judgementalism and confidentiality are the cornerstones of the Greenlight process. Data must be treated as confidential throughout process – that's why planning is so important. Think about where your data is going to be stored and who it's going to be shared with. Don't share granular data with management or anyone that could be seen to use this data in unconstructive ways, to the detriment of people and families.

Selecting Target Audience

- ✘ If you target the wrong audience to assist, the follow-on Greenlight surveys (year 1, 2, 3) and any ongoing assessments will show little impact.

- ✔ A baseline Greenlight survey assists in targeting the right people and families who need your assistance. Don't continue to work in a community when it is obvious (through the baseline survey results) that they don't need your type of assistance. Refer to partners and rather exit to work with communities who CAN use your programme and where impact is achievable.

- ✘ Selecting to assist people/families who are VERY red and show little motivation to want to help themselves

- ✔ You can't be the pilot in someone else's life, and you can't change people – only they can change themselves. Be aware of why you are selecting to assist your target audience. Sometimes families are so stuck in their situation that it is better to walk away and come back when they are able to listen and respond. Do some reading around internal locus of control – it will help you to identify people who are able to respond.

Partnering and Collaborations

- ✘ Listening to stories from people who haven't used Greenlight can cause you to choose short-cuts and put you off implementing in a responsible way.

- ✔ If you are not sure of anything, call a Greenlight Movement member who has implemented and ask for their input and advice. Trust your community of practice. Also, the Greenlight Office is always available to assist.

- ✘ Referring your beneficiaries to another organisation who does not step in and provide the quality of service you were hoping for.

- ✔ Word of mouth is one of the best ways of assessing quality of service – use Greenlight Movement members to ask for assistance or advice on whom to refer to. Don't hesitate to ask for evidence of impact on previous programmes. We want the cream to rise.

- ✘ Another org has already used Greenlight in a community that you are interested in, but you don't know enough about their engagement to make sure you are not duplicating efforts.

- ✔ Be aware who else is working within your community or with your beneficiaries. You may end up duplicating efforts rather than collaborating to achieve combined, holistic impact. There is nothing wrong with asking beneficiaries who else they are engaged with. You can always ask the Greenlight Office to check if a name or ID number is already in the database.

