SOUTH-TO-SOUTH TECHNICAL EXCHANGE ON INTEGRATING PEPFAR GENDER STRATEGIES

FRAMEWORK AND TOOLKIT

AIDSTAR-One
AIDS SUPPORT AND TECHNICAL ASSISTANCE RESOURCES

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Abstract

This framework and tools for linking technical assistance providers to implementing partners consists of a step-by-step process for linking south-based providers of technical assistance to organizations interested in assistance. It contains a variety of tools and guidelines for facilitating the technical exchange, implementing the work, monitoring progress, evaluating outcomes, and reflecting on how to move forward once an exchange is complete. Because it is a framework, it allows for tailoring and adaptation to a variety of circumstances while adhering to guidelines for good practice.

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ACRONYMS

AIHA	American International Health Alliance
CBO	community-based organization
CHAA	Caribbean HIV&AIDS Alliance
GBV	gender-based violence
GPI	Girls' Power Initiative
HACC	HIV/AIDS Coordinating Committee
ICAD	International Coalition on AIDS and Development
IHMP	The Institute of Health Management, Pachod
IP	implementing partner
KHANA	Khmer HIV/AIDS NGO Alliance
LVCT	Liverpool VCT, Care and Treatment
M&E	monitoring and evaluation
MOU	memorandum of understanding
NGO	nongovernmental organization
PATA	Positive Action for Treatment Access
PEPFAR	U.S. President's Emergency Plan for AIDS Relief
POWA	People Opposed to Women Abuse
S2S	south-to-south
SAT	Southern African AIDS Trust
SOW	scope of work
TA	technical assistance
TASO	The AIDS Support Organisation
USAID	U.S. Agency for International Development
USG	U.S. Government
UYASS	Uganda Youth Anti-AIDS Association
WASN	Women and AIDS Support Network

INTRODUCTION

South-to-south (S2S) cooperation, defined as an exchange of expertise and resources between governments, organizations, and/or individuals in developing nations, has gained momentum in recent years as a way to improve aid effectiveness and to develop sustainable solutions to development challenges.[1] As a means to development and technical assistance (TA), S2S cooperation began in the 1950s as a way for countries that needed foreign aid to get TA without aligning themselves politically with either the Soviet bloc or North Atlantic Treaty Organization allies.[2] This collaboration, sometimes called horizontal or triangular when a third party facilitates the collaboration, occurs at the government-to-government level, through transnational companies, and through community-based organizations (CBOs) and nongovernmental organizations (NGOs).

The U.S. President's Emergency Plan for AIDS Relief (PEPFAR) Gender Technical Working Group recognized that there are untapped resources in the field for S2S exchange to strengthen the capacity of local organizations to integrate gender strategies into their HIV programs.[3] This document provides a framework and tools for PEPFAR missions to facilitate S2S TA exchanges for their implementing partners (IPs) and identifies organizations with the expertise to provide TA in gender integration. AIDSTAR-One performed a search of peer-reviewed literature, reviewed websites of organizations mentioned in the literature and recommended by colleagues, and interviewed previous facilitators, providers, and recipients of S2S TA.

AIDSTAR-One found vigorous and innovative groups of organizations facilitating S2S TA exchange addressing HIV- and gender-related issues. The Southern African AIDS Trust (SAT) and Population Council Zambia have built partnerships with a range of academic, national, and community-based organizations, facilitating exchanges and providing TA between organizations as varied as the Zambian and Malawian Police and CBOs working to prevent gender-based violence (GBV). The Task Team on South-South Cooperation, supported by the World Bank Institute, has set up an exchange where organizations can tell their stories, describe TA they can provide or need, and connect with other organizations (www.southsouth.info). The Twinning Center, the International AIDS Alliance, and the International Coalition on AIDS and Development (ICAD) have all published useful models and tools for facilitating or engaging in S2S TA exchange. In addition, some of the organizations whose directors and staff were interviewed, including SAT, Raising Voices, Sonke Gender Justice Network, and Liverpool VCT, Care and Treatment (LVCT), have developed tools for the entire process of TA exchange, from initiation, to workplan development and implementation, to monitoring and evaluation (M&E), and ongoing mentoring. However, several people we interviewed mentioned that, at least in the area of GBV, there was a real need for the documentation and dissemination of models that can be adapted to local contexts.

[1] The World Bank Institute. 2010. *Focus on South-South Knowledge Exchange*. Available at http://siteresources.worldbank.org/WBI/Resources/213798-1259011531325/6598384-1268250571502/south_overview_nospread.pdf (accessed June 2010)

[2] Task Team on South-South Cooperation. 2010. "South-South cooperation in the context of aid effectiveness." Available at http://api.ning.com/files/SwykFuav-XMFudJpnX2l*2EXoEdPUD07BvWjU5H*VcEOKEiZ2mKyfaqG2z98s14x5Rzkle6DUO1x2uCFxpxov91huRYUf7y0/TTSSCCasestoriessummaryreportdraft20100317.pdf (accessed June 2010)

[3] The five PEPFAR strategies are increasing gender equity in HIV programs and services, reducing violence and coercion, addressing male norms and behaviors, increasing women's legal protection, and increasing women's access to income and productive resources.

PURPOSE OF THE SOUTH-TO-SOUTH FRAMEWORK AND TOOLKIT

This framework aims to serve as a guide for PEFPAR missions to facilitate S2S TA exchange from organizations with expertise in one or more of the PEPFAR gender strategies to U.S. Government (USG) IPs requesting TA in gender integration. The framework could also be a resource for TA providers looking for new tools or for an organization receiving TA to review the steps and processes involved in an S2S TA exchange to prepare for the work.

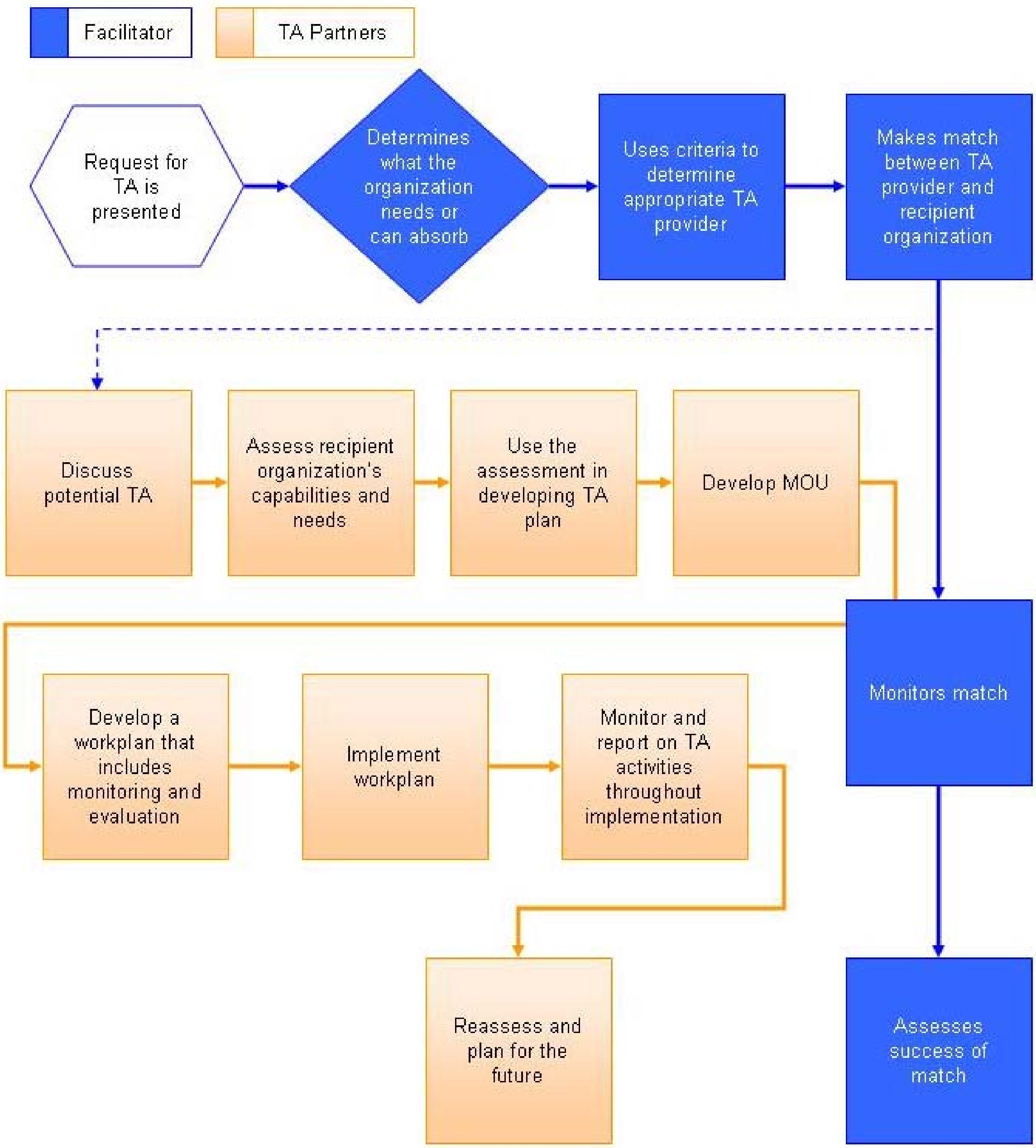
PHASED APPROACH TO SOUTH-TO-SOUTH TECHNICAL ASSISTANCE EXCHANGE–SETTING IT UP FOR SUCCESS

Productive S2S TA exchanges comprise the following three phases:

1. Phase 1 involves creating a plan for the work that incorporates M&E. This includes developing a scope of work (SOW) for the TA provider, identifying a TA provider based on the SOW, negotiating roles and responsibilities, creating a statement of work, and ensuring the provider and recipient agree on a memorandum of understanding (MOU) and develop a workplan. During this phase, communication systems and implementation and evaluation processes should be defined clearly, in detail, and agreed on.
2. Phase 2 consists of the implementation of the planned activities and data collection for M&E.
3. Phase 3 begins on the heels of the evaluation when the TA facilitator, recipient, and provider decide whether to continue pursuing their relationship and how the partnership might be sustained.

Each phase is described in detail along with resources and tools for performing the work at each stage.

Figure 1. Steps to Facilitate South-to-South Technical Assistance Exchange



PHASE 1: DEVELOPMENT AND PLANNING

TA exchange can be demand-driven through requests from TA recipients or supply-driven with a TA provider actively soliciting partners for capacity building or implementation of a program. TA can also result from a third party acting as a facilitator to bring partners together for learning and capacity building in targeted areas, often with financial support (or grants) from the facilitator. In this framework, the facilitator could be a USG team or an organization working on behalf of a USG team, depending on the preference of individual USG teams.

FACILITATOR ROLE DURING THE INITIATION AND PLANNING PHASE

The facilitator's main role is to develop the necessary components to enable the project to move into the implementation phase, including 1) identifying TA providers to match with IPs on specific kinds of TA for gender integration; 2) awarding subcontracts to TA providers that state clearly the objectives, scope, and deliverables expected from provider and recipient organizations, as well as funding the cost of providing the TA; 3) monitoring the relationship between the two organizations during and after the TA has been provided; and 4) assessing the outcomes and lessons learned, and adapting future TA matching processes as needed.

Beginning with the IP, the facilitator may want to evaluate whether the organization can support or absorb the TA being considered with a tool similar to SAT's Rapid Assessment tool. This tool, found at www.satregional.org/content/resources.html, can be adapted for a facilitator's needs. A brief assessment can help the facilitator understand the capabilities of the IP and any needs that should be addressed to help make the TA as effective as possible. It may also influence the selection of the TA provider, for whom selection criteria are provided in the section on "Identification and Selection of Technical Assistance Providers."

DEVELOPING THE SCOPE OF WORK

Once the facilitator has clarified the TA the IP needs, a SOW for the assistance that reflects context, capacity, and needs of the requesting organization must be developed. At a minimum, the SOW should:

- Define the purpose of the TA.
- Establish clear goals and objectives for the TA.
- Identify duties of the facilitator, recipient, and provider, including staff positions required and a plan for communication between the parties.
- Create an action plan showing activities and timeframes.
- Determine a budget and any schedule of payments.
- Determine the expected results and success indicators.
- Develop a monitoring and reporting strategy based on the goals, expected results, and indicators.
- Determine the evaluation strategy. This should include data to be collected and the method for analyzing it; which elements of the project will be evaluated; what tools will be used, such as questionnaires or interviews; what resources are necessary for the evaluation, including funds and

personnel; who the participants in the evaluation will be; the process for testing any tools and methods; and how the results will be determined and communicated.

This is the time to establish clarity in roles and responsibilities. Failure to clarify roles, expectations, budgets, and M&E criteria can cause misunderstandings that affect the success of the TA. Appendix 1 includes a template for a SOW and draft SOW written specifically for TA in integrating gender strategies.

IDENTIFICATION AND SELECTION OF TECHNICAL ASSISTANCE PROVIDERS

Selecting a qualified and appropriate TA provider requires a process of evaluating the technical expertise and capability of potential providers in gender strategies to find the best match to deliver the needed TA cost-effectively. Many facilitating organizations have created lists of experienced TA providers (or consultants) that meet certain criteria for specific topical or technical areas.

An initial list of TA providers for the PEPFAR gender strategies is included in Appendix 2 with basic information about each organization. Organizations were selected for this list based on their prior experience in providing S2S TA exchange in gender strategies to programs doing HIV prevention or care and support. This list can be expanded and modified by U.S. Agency for International Development (USAID) Missions as additional information becomes available.

The following criteria can be used to assess the qualifications of the TA provider for engaging in a S2S TA exchange:

- Organizational capacity to provide the required TA (e.g., availability of technical team, infrastructure to support the TA, and specific experience integrating gender into HIV work)
- Understanding of the required TA and goals
- Technical expertise in the requested area(s)
- Demonstrated experience and capability in providing TA in the requested area(s); past performance in similar areas
- Motivation and leadership qualities necessary to successfully complete the TA
- No evidence of potential conflicts of interest and/or strategies in place to address any conflicts that may arise.

Appendix 3 contains a sample list of criteria for selecting a TA provider.

In addition to assessing technical and organizational qualifications of a potential TA provider, it is important to consider the characteristics of both the provider and recipient in establishing the best possible match for a given S2S exchange. In matching provider to recipient, the following factors should be considered:

- Although language and culture may not necessarily be barriers to a successful match, both organizations must be prepared to and have experience in working across cultures and understand the implications for differences in communication, learning styles, and relationships.
- Geographic proximity may have a direct bearing on the budget requirements and the types of training or capacity building modalities possible (e.g., study tours, mentoring and coaching visits).

- Both organizations must be willing to commit sufficient resources, personnel, and time to the S2S TA exchange for it to succeed. The personnel should be able to commit to the entire duration of the agreed on SOW so as not to lose continuity. Similarly, the appropriate level of personnel who have the means and authority to take the learning and apply it within their organization is needed.
- Most importantly, both organizations should view this not as just a one-time training event, but as part of a long-term plan to build partnerships and ongoing relationships within a network of people/organizations working toward common goals. This is not intended to be a "quick fix" for short-term benefit.

PARTICIPATORY ASSESSMENT OF A TECHNICAL ASSISTANCE RECIPIENT BY A TECHNICAL ASSISTANCE PROVIDER

Once a match has been made, it is important for the TA provider and recipient to collaborate on an assessment of the recipient organization's needs and strengths in the requested areas of TA. This assessment provides an opportunity to document and understand the organization's strengths and needs for integrating the gender strategies into its activities, and what its goals are in this area. For example, the recipient organization may have experience in designing programs to increase women's access to HIV services, but would like to develop more specific ways to address male and female norms and practices to reduce multiple and concurrent sex partnerships, cross-generational sex, or transactional sex in its HIV prevention activities. An assessment is also an opportunity to refine the kind of TA the organization needs so that assistance and training can be targeted to those identified needs. Thus, the assessments are the platform on which the TA is designed and helps target assistance appropriately so an organization can learn, evaluate, and move forward in a long-term relationship. For example, an organization that appears to need capacity building to integrate gender strategies into its activities may also need training to help enhance sustainability, such as in writing grant proposals. An assessment can be a good indicator of whether management and staff are on board and will be willing to do the work necessary to absorb the TA.

Experienced organizations have developed a number of assessment tools that can be tailored for assessing organizational capacity in gender integration. Appendix 4 describes some of the tools developed by organizations implementing S2S TA exchanges and provides links to websites where they can be downloaded. In general, an initial assessment of a recipient by a provider should identify some of the strengths and needs in the following areas:

- Governance, strategy, and structure to support gender work
- Financial structure in place to manage grants in gender work in an accountable and transparent manner
- Human resources, including the structure and staffing required for integrating gender strategies
- Prior experience with gender programming
- Resource mobilization to leverage support for gender strategies
- Partnerships and networking with key actors and stakeholders in gender strategies.

Such an assessment can clarify where the organization needs capacity building in order to be better prepared to mainstream the gender strategies into its core programming. This helps design the TA so that it builds on existing strengths and targets the specific areas needed for capacity building. At this point, the facilitator and provider may need to revisit the SOW for the TA provider in order to tailor it to the required tasks based on information in the assessments of the recipient.

THE MEMORANDUM OF UNDERSTANDING

The recipient and provider organizations will want to have an MOU that details the expectations, roles, timelines, and deliverables each party is responsible for (see Appendix 5 for a template for an MOU). An MOU will include, for example, a description of the project, a list of commitments from the provider, and obligations on the part of the recipient. Most providers will have established an MOU format.

DEVELOPING THE WORKPLAN

The workplan is a flexible, collaborative planning tool that helps the provider and recipient organizations identify the overall goal and specific objectives of the TA and activities to be implemented in order to achieve their shared objectives. The workplan should include steps taken to gather data in order to monitor and evaluate progress and specify reporting requirements.

The workplan must represent a joint effort of the two organizations, be endorsed by key team members on both sides, and reflect efficient use of resources consistent with the budget and agreed on SOW. Unlike the contract, which states requirements that must be met, the workplan should be flexible in the event an organization needs further work in an area of focus that was missed in the assessment (see Appendix 6 for a workplan template).

DEVELOPING A MONITORING AND EVALUATION PLAN

The purpose of an M&E plan is to assist organizations and the mission in monitoring progress toward program goals and create systems that support learning from experience, help disseminate knowledge of promising practices, and provide feedback to the partner organizations for programmatic improvement and decisions regarding replication of successful project models. The M&E plan proposed here is specifically designed to help USG missions monitor progress toward strengthening the TA recipient's capacity in gender integration and evaluate the overall success of the S2S exchange. Once a TA provider has been selected, the mission can follow a step-by-step process using the associated tools to establish an M&E system for the TA. This process is woven through the entire exchange in all three phases.

During **Phase 1**, the following components must be put in place:

- The first step in establishing an M&E system is to have a **written SOW** for the TA provider (see Appendix 1) that states clearly the expectations for the provider and includes a list of the deliverables and monitoring procedures required for accountability, evaluation, and learning.
- The second step is to review the **results of the initial assessment** of the TA recipient to determine the priority needs for TA in integrating gender strategies in its core programming. The SOW may be modified based on the results of the assessment. Appendix 4 contains a list of available assessment tools.
- As part of the deliverables, the TA provider and recipient should use a participatory process to develop an **MOU and workplan** (see Appendices 5 and 6) for the partnership based on the results of the initial assessment. The MOU and workplan will serve as the reference points for monitoring progress toward stated goals.

- Depending on the scope and duration of the TA project, the mission, TA provider, and TA recipient should agree on a **performance monitoring plan** that includes specified indicators for achieving S2S exchange objectives. A sample M&E plan is available in Appendix 7.

During **Phase 2**, the implementation period, the mission's main role is to remain in contact with the TA provider and TA recipient to ensure that the activities follow the workplan, and to assist in collaborative problem solving of any unforeseen difficulties in implementing the workplan. The mission may also require:

- **Periodic progress reports** (see Appendix 8) depending on the length of the S2S exchange and information needs of the mission.
- **TA activity reports** (see Appendix 9) from the TA provider for any major training event such as workshops or training visits.

At the end of the implementation period, the TA provider should submit a **final report** (see Appendix 10) summarizing the achievements, challenges, and lessons learned from the S2S TA exchange. This report should include a full accounting of the budget and costs incurred in the implementation of the TA project. The recipient of TA in this S2S exchange will have an opportunity to report their experiences in Phase 3.

In **Phase 3**, the mission can assess the overall success of the project through a variety of means, including:

- A simple **post-TA survey** of TA recipients and partners (Appendix 11 provides sample surveys).
- **Interviews** with select representatives of TA recipients and providers for a more qualitative, in-depth review of the experience to identify what worked well, what could be done better, and lessons learned for future applications. The survey and interviews can also be used to elicit specific stories about the "most significant change" in terms of increased capacity to integrate gender strategies. Appendix 12 provides sample interviews for providers and recipients.
- A **joint workshop** with the partners and other stakeholders (e.g., government representatives, NGOs, or other partner organizations) to participate in collaborative learning to identify promising practices, lessons learned, and to facilitate networking for future S2S exchange.

The results of the post-S2S TA exchange assessment can be combined with the information garnered during the implementation phase to arrive at a **final analysis of the TA exchange** that can be used to inform future programming.

Table 1 shows the components of M&E, who is responsible for them, and a suggested timetable for their delivery or completion.

Table 1. Monitoring and Evaluation Components

What?	From Whom?	When?
Summary results of initial assessment	TA provider in collaboration with TA recipient	Within five days of completion of initial assessment
MOU	TA partners	Within five days of the summary of results of initial assessment
Workplan	TA partners	Within one week of completion of MOU
TA activity report, including participant evaluation of event	TA provider	After each major TA activity/event (e.g., workshop or training visit)
Progress report	TA provider	Optional at mid-project, depending on length of TA exchange and mission information needs
Post-survey of TA recipients and providers	Mission to send out	At end of exchange
Interview of select recipients and providers	Mission	Optional at end of project
Final project report	TA provider	At end of project

PHASE 2: IMPLEMENTATION

Implementation should follow the workplan developed and agreed on in Phase 1. It should be a working document in the event a strategy needs to be revised as a result of experience on the ground, organizational issues missed in the Phase 1 assessment, or other issues.

FACILITATOR ROLE DURING IMPLEMENTATION

The primary role of the mission or other facilitating organization is to oversee the implementation process to ensure accountability for participating organizations and to support the process through formative feedback and collaborative problem solving as unforeseen issues and challenges arise. This can be done through a variety of means, including:

- Logistical assistance, such as help with planning for meetings, if necessary.
- Timely disbursement of funds and resources according to plan.
- Careful review of progress reports required by the SOW and workplan. These may be periodic progress reports as shown in Appendix 8, or quarterly or midterm reports, depending on what the facilitator needs in order to monitor the TA.
- Review of TA activity reports such as those shown in Appendix 9, depending on the level of information being collected to monitor and measure progress.
- Periodic conversations or meetings to discuss progress toward goals, resource utilization, quality of TA exchanges, and address any problems that may have arisen.

The provider will prepare and the facilitator will review a final report that uses previously agreed on data the provider has collected to summarize the S2S exchange achievements, challenges, and lessons learned.

This report should include a full accounting of the budget and costs incurred in the implementation of the TA project. A template for the final report is shown in Appendix 10.

PHASE 3: SUSTAINING PROGRESS/REASSESSMENT

The S2S TA exchange process will provide the USG with an understanding of how such a strategy works to build the capacity of IPs to integrate gender into their country programs. The facilitator must understand the information it needs to make an informed choice about continuing support for S2S exchanges, how to make them better, and how to define its strategic role in leveraging local resources for more effective achievement of the five PEPFAR gender strategies. To do this, missions or other facilitating organizations may wish to employ the following:

- Conduct an end-of-collaboration survey of organizations participating in mission-facilitated S2S TA to gather qualitative data on their experiences and perspectives on what worked well, what could be done better, and a story about the "most significant change" as a result of the TA exchanges. Appendix 11 contains a sample survey for the recipient and provider involved in the technical exchange.
- Interview representatives of TA providers and recipients for a qualitative, in-depth review of the TA experience to identify what worked well, what could be done better, and lessons learned for future application. Appendix 12 contains sample interviews.
- Bring participant recipient and provider organizations together for a collaborative, reflective learning session to identify good and promising practices and lessons learned, and facilitate planning for future S2S TA exchanges.
- Analyze TA costs to determine the efficiency of the S2S exchange.
- Publish or disseminate results of the learning sessions and ensure the transfer of learning from each S2S TA exchange to future exchanges and contribute to the broader body of knowledge on effective S2S exchanges for other donors, TA providers, and TA recipients.

Reflective evaluation of the TA should address four main areas of inquiry:

- To what extent have the intended goals and objectives of increasing capacity to integrate gender strategies into a country's USG-sponsored programs been achieved?
- What are the outcomes (intended and unintended) of the S2S TA exchange in capacity building, relationship building, and networking?
- Are the results of the TA exchange worth the investment in resources?
- What promising practices and lessons can be learned from the experience to guide decisions about the way forward?

APPENDIX I

DRAFT STATEMENT OF WORK AND STATEMENT OF WORK TEMPLATE

STATEMENT OF WORK

(Draft Example)

TITLE: SOUTH-TO-SOUTH TECHNICAL ASSITANCE EXCHANGE ON PEPFAR GENDER STRATEGIES

I. PURPOSE

The purpose of the South-to-South Technical Assistance (S2S TA) exchange is to provide high-quality TA and capacity building for PEPFAR implementing partners (IPs) to integrate gender strategies into their HIV program activities.

II. BACKGROUND

Because gender affects all aspects of HIV programming, PEPFAR mainstreams gender throughout the comprehensive HIV programs that it supports. The authorizing legislation for PEPFAR specifies that PEPFAR will support five high priority areas, including 1) ensuring equitable access to HIV activities and services; 2) reducing gender-based violence and coercion; 3) challenging negative male norms; 4) expanding women's legal rights and protections; and 5) increasing women's access to education, vocational training, and microfinancing.[4] These key priority strategies, along with systematic efforts to mainstream gender across all program areas, are essential components to achieving prevention, treatment, and care program goals. USAID is interested in helping IPs address the PEPFAR gender strategies by supporting and facilitating an S2S TA exchange for partners requesting such assistance.

III. GOAL AND OBJECTIVES

The goal of the S2S TA exchange is to support and advance implementation of PEPFAR's gender strategies through the provision of high-quality gender-related TA to IPs requesting such assistance.

Objectives of the project are:

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[4] Lantos, Tom, and Henry J. Hyde. United States Global Leadership Against HIV/AIDS, Tuberculosis, and Malaria Reauthorization Act of 2008 (P.L. 110-293)

1. To increase the knowledge base and skills of the IP in methods for integrating gender strategies in HIV programs.
2. To enhance the quality and effectiveness of gender integration strategies.
3. To support networking and relationship building to sustain the momentum for integrating gender strategies in HIV programming.

IV. PERIOD OF PERFORMANCE

The period of performance is ____________________.

V. PROGRAM TASKS/APPROACHES

The TA provider is expected to:

1. Conduct an initial collaborative assessment of the organizational capacity of the TA recipient to clarify the TA needs and the ability to absorb the TA.
2. In collaboration with the TA recipient partner, develop a Memorandum of Understanding (MOU) that both parties will sign and that clearly states the agreed on goals and objectives (based on the results of the assessment), roles and responsibilities of partners, and general terms and conditions of the partnership.
3. Conduct a participatory process with the TA recipient to develop a workplan to achieve the goals stated in the MOU within the project's period of performance. In developing the workplan, the TA provider should draw on its own expertise to use innovative approaches to providing TA that are most effective for meeting the TA needs of the recipient and that are adaptable to the context and culture of the recipient. The workplan is a joint effort to be endorsed by key team members of both partners.
4. Develop and implement a monitoring and evaluation plan as part of the workplan to document the training activities and their outcomes as well as to contribute to learning about the most effective way to provide TA on the integration of gender strategies.
5. Implement the workplan as agreed on, ensuring that adequate time is given to key personnel to conduct the training and other capacity building activities and follow-up TA.
6. Produce required reports and submit them in a timely fashion.
7. Maintain financial accountability and transparency in managing and reporting on the funds provided for the TA project.

VI. ANTICIPATED RESULTS

1. Increased knowledge, skills, and capacity in the TA recipient for integrating gender strategies into HIV work.
2. Increased commitment on the part of the IP in integrating gender strategies.
3. Support and strengthening of collaborative relationships and networking for integrating gender strategies in HIV work.

VII. DELIVERABLES AND/OR PERFORMANCE MEASURES

1. MOU signed by both TA recipient and provider.

2. Workplan with detailed descriptions of TA tasks/activities and timeline for completion.
3. Summary of results from initial assessment of TA recipient.
4. TA activity reports for major TA events (e.g., workshops or training visits).
5. Training materials developed for the TA project.
6. Progress report if required by the facilitator.
7. Final project report.

VIII. KEY PERSONNEL/ROLES AND RESPONSIBILITIES

Provide the following for each key personnel:

- Name and title on the project.
- Description of duties on the project.
- Anticipated level of effort on the project.

IX. TYPE OF CONTRACT/PAYMENT SCHEDULE

STATEMENT OF WORK

(Template)

TITLE OF PROJECT:

I. PURPOSE

II. BACKGROUND

III. GOAL AND OBJECTIVES

IV. PERIOD OF PERFORMANCE

V. PROGRAM TASKS/APPROACHES

VI. ANTICIPATED RESULTS

VII. DELIVERABLES AND/OR PERFORMANCE MEASURE

VIII. KEY PERSONNEL/ROLES AND RESPONSIBILITIES

IX. TYPE OF CONTRACT/PAYMENT SCHEDULE

APPENDIX 2

LIST OF POTENTIAL PROVIDERS

POTENTIAL PROVIDERS OF SOUTH-TO-SOUTH TECHNICAL ASSISTANCE EXCHANGES TO ADDRESS GENDER INEQUITY IN HIV PROGRAMMING

The following lists well-established organizations that could provide TA to USG IPs that wish to integrate PEPFAR gender strategies into their HIV programs. This is a list based on research and staff knowledge of programs in Africa, Asia, and Latin America. The criteria for including an organization were that it worked in the field of HIV and had programs promoting at least one gender strategy in descriptions of its work in informational materials and on its website. Organizations on the list have agreed to be contacted, and their descriptions and contacts have been vetted. The list is not comprehensive, however, and does not preclude use of other TA providers by PEPFAR partners. In addition, organizations that act as hubs for networks and information exchange are included because they can widen access to regional organizations. Table 2 shows the organizations by PEPFAR strategy and region. The list with descriptions and contacts follows.

Table 2. Organizational Capacity by PEPFAR Gender Strategy

PEPFAR Strategy	Region		
	Africa	***Asia***	***Latin America/Caribbean***
Increasing gender equity in programs and services	Girls' Power Initiative (GPI) Liverpool VCT, Care and Treatment (LVCT) Paediatric AIDS Treatment for Africa People Opposed to Women Abuse (POWA) The AIDS Support Organisation (TASO) Uganda Youth Anti-AIDS Association (UYASS) Women and AIDS Support Network (WASN) Women for Change	HIV/AIDS Coordinating Committee (HACC) Khmer HIV/AIDS NGO Alliance (KHANA) The Institute of Health Management, Pachod (IHMP)	Alianza Intercambios Caribbean HIV&AIDS Alliance (CHAA) Instituto Promundo Via Libre

PEPFAR Strategy	**Region**		
	Africa	***Asia***	***Latin America/Caribbean***
Reducing violence and coercion	GPI LVCT POWA Raising Voices Sonke UYASS WASN		Alianza Intercambios CHAA Instituto Promundo Via Libre
Addressing male norms and behaviors	Raising Voices Sonke UYASS	KHANA	Alianza Intercambios Instituto Promundo Via Libre
Increasing women's legal protection	POWA Women for Change	IHMP	
Increasing women's access to income and productive resources	GPI Women for Change	IHMP KHANA	

AFRICA

Girls' Power Initiative (GPI; www.gpinigeria.org) works with girls who are 10 to 18 years of age on rights-based gender sensitive approaches to sexuality and reproductive health, helping to assure youth development and prevent HIV transmission. GPI also works to reduce stigma and discrimination and improve prevention, treatment, and care and support services for HIV at local, state, and national levels. GPI works in four states in Nigeria and the founders, Grace Osakue and Bene Madunagu, have provided TA to organizations globally.

Specialty: research, curriculum development, schools' outreach, peer education, edutainment, stakeholder forums, community intervention/social work, counseling services, economic skills training, gender sensitivity, and sexuality education trainings.

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Liverpool VCT, Care and Treatment (LVCT; www.liverpoolvct.org) is an indigenous Kenyan organization. It undertakes HIV prevention, care, and treatment; sexual and reproductive health policy reform; and service delivery interventions in Kenya. LVCT focuses on generation of evidence for policy reforms, health systems strengthening, increasing coverage of HIV testing and counseling, linking testing to treatment, and sexual and reproductive health partnering with government, private sector, and civil society organizations. LVCT gives special attention to vulnerable populations, including survivors of sexual assault, men who have sex with men, prison populations, persons with disabilities, sex workers, and youth.

Specialty: operational research and publications, policy reforms, consultancy, direct service delivery, technical support, and capacity development and training.

Contact: Nduku Kilonzo, PhD (Email: nduku@liverpoolvct.org)

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People Opposing Women Abuse (POWA; http://www.powa.co.za/) is a South African women's rights organization that was established in 1979 in response to the excessive levels of violence against women. POWA provides direct legal and psychosocial services and support to women survivors of violence and their children. Through its sector strengthening and capacity building programs, POWA aims at increasing women's access to services and justice. Currently, POWA is working with emerging CBOs working to address violence against women in four provinces: Limpopo, North West, Northern Cape, and Mpumalanga. POWA's work in HIV, particularly in regard to its leadership role within the One in Nine Campaign (www.oneinnine.org.za/ipoint), includes research on the intersections between violence against women and HIV. POWA has also provided TA to the Treatment Action Campaign in South Africa to increase gender equity throughout the organization and build leadership capacity within the organization. POWA conducts action and analytical research within the GBV sector both for internal use and for sharing. POWA's unit on legal advocacy and law reform seeks to carry the insights, experiences, and lessons learned through service delivery work into the drafting, reviewing, and challenging of laws and policies that impact women's lives.

Specialty: direct psychosocial and legal service provision, training and education for women's groups, law and policy reform, and research.

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Positive Action for Treatment Access (PATA; www.pata-nigeria.com) is an NGO working to ensure equity in health service and information. PATA promotes and advocates access to non-discriminatory gender-based health care responses; works in partnership with other organizations and governments to facilitate sector-wide HIV prevention, testing, treatment, and sharing of information; and creates platforms for networking and capacity building. One of PATA's programs is Mentorship and Building Leadership and Advocacy Capacity of Women Living with HIV across Nigeria. The Executive Director, Morolake Odetoyinbo, has worked with organizations such as the Centre for Development and Population Activities to build leadership capacity of other women groups. Odetoyinbo is the incoming board member representing infected and affected communities at the Global Fund for AIDS, Tuberculosis and Malaria.

Specialty: media education, community outreach, NGO training, volunteer recruitment, women living with HIV, and leadership development.

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Raising Voices (www.raisingvoices.org) works to prevent violence against women by addressing gender roles and the imbalance of power between men and women. It develops and provides TA and holistic and community-based approaches to change attitudes and behaviors that perpetuate violence against women. One of its methodologies, SASA!, works to prevent violence against women and HIV by addressing power issues in intimate relationships.

Specialty: community mobilization for violence prevention, including media and advocacy, community activist training, communication materials, and institutional strengthening for prevention and response.

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Sonke Gender Justice Network (www.genderjustice.org.za) works to promote gender equality, prevent domestic and sexual violence, and reduce the spread of HIV. Their flagship program, the One Man Can Campaign (http://www.genderjustice.org.za/onemancan/), involves men and boys in preventing domestic violence, stopping HIV, and becoming active fathers. Another program, Brothers for Life, addresses the risks of multiple concurrent partnerships, lack of knowledge of HIV status, low levels of testing and disclosure, insufficient health seeking behaviors, and limited involvement in fatherhood. Sonke's work spans the continent. The One Man Can Campaign, for example, is being implemented in eight of South Africa's nine provinces as well as Burundi, Kenya, Malawi, Mozambique, Namibia, and Uganda. Sonke has provided TA to south-based organizations in Africa as well as other regions.

Specialty: training and capacity building on working with men and boys to address the spread and impact of HIV and to prevent GBV, including on the use of the following social change strategies: community education, community mobilization, policy development and advocacy, the use of media for social change, and on building local, regional, and global coalitions and networks.

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or
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The AIDS Support Organisation (TASO; www.tasouganda.org) provides comprehensive HIV services ranging from HIV prevention to care and treatment. It addresses the needs of people living with HIV by providing a full range of support from counseling and social support to medical care, training and capacity building, HIV education and community mobilization, advocacy, and networking.

Specialty: counseling, clinical- and home-based medical care, advocacy and networking, HIV prevention with the positives programming, training, and capacity development.

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Uganda Youth Anti-AIDS Association (UYAAS; www.uyaas.co.ug/index.htm) focuses on the response to HIV through school- and community-based educational efforts that focus on youth aged 10 to 24 years in school and 10 to 30 years out of school, especially in rural areas. In the past 17 years, UYAAS has gained vast experience in working directly with young people on educational and behavioral changes concerning HIV, sexually transmitted infections, and adolescent reproductive health in general.

Specialty: HIV prevention education, capacity building, and voluntary counseling and testing for young people.

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Namirembe Hill-Mengo

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Uganda
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Women and AIDS Support Network (WASN; www.kubatana.net/html/sectors/wom003.asp) addresses women's issues associated with HIV through advocacy, support, and networking. The organization helps disseminate information on sexual and reproductive health and rights for women and girls, and provides skills training, services, and counseling to promote awareness and reduction of sexually transmitted infections.

Specialty: capacity building, information dissemination, and facilitates access to health services and counseling.

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or
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Zimbabwe
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Women for Change (WFC; www.wfc.org.zm/index.php) is a Zambian gender-focused NGO working with communities, especially women and children, in rural areas. The organization's principle objective is to contribute to the creation of sustainable economic and social systems that are controlled by rural communities and which respond to their needs.

Specialty: gender analysis and awareness, human rights education, income-generating activities, advocacy, youth and child development, HIV mitigation, and community-based association support.

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ASIA

HIV/AIDS Coordinating Committee (HACC; www.hacccambodia.org/index.php) was established in 1993 to share information on HIV among its members and as a forum to coordinate the activities of NGOs working on HIV in Cambodia. HACC has grown to become an important instrument in coordinating and facilitating civil society working on HIV in Cambodia. It has also successfully taken on the role of representing NGOs at government and U.N. forums, the purpose of which is to share information and to advocate change.

Specialty: networking, coordination, information sharing, advocacy, organizing HIV awareness campaigns, research, capacity building, and providing financial and technical support to civil society.

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Khmer HIV/AIDS NGO Alliance (KHANA; www.khana.org.kh) operates as a linking organization of the International HIV/AIDS Alliance. It focuses on equal access to quality HIV prevention, treatment, and care and support; impact mitigation; and related health and development opportunities. It works to contribute to the development, health, and well-being of communities through integrated care and prevention programs, prevention programs for most-at-risk populations, and capacity building to strengthen transparency, accountability, and governance.

Specialty: capacity building, community response, and policy dialogue.

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The Institute of Health Management, Pachod (IHMP; www.ihmp.org/adolescent_health.html) concerns itself with the well-being of adolescent girls who are vulnerable to social and health risks. IHMP tries to improve the social status of adolescent girls by developing skills related to gender, legal literacy, and team-building. It also seeks to improve adolescent girls' health status by increasing their skills in health and nutrition.

Specialty: research, policy advocacy, disaster management, and training.

Contact:
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Ms. Manisha Khale, Deputy Director
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LATIN AMERICA

Alianza Intercambios (www.alianzaintercambios.org/?idioma=english) works to improve health sector capacities to address GBV using a public health- and human rights-based approach that disseminates knowledge, works to change policies, and provides access to tools for the health sector.

Specialty: research, advocacy, and training.

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Caribbean HIV&AIDS Alliance (CHAA) Technical Support Hub
(http://caribbeanhivaidsalliance.org/) provides technical support to the English-speaking Caribbean and Haiti. Based in Port of Spain, Trinidad, it services all Caribbean community member states and associate members.

Specialty: most-at-risk population programming, capacity strengthening, strategic information and M&E, workshops, training, publications, and funding.

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Instituto Promundo (www.promundo.org.br) encourages young people to question traditional gender norms, aiming to promote gender equity, prevent gender violence, and reduce vulnerability to HIV. Promundo has been a lead organization on work on men's involvement and as such has been a provider of TA to countries around the world.

Specialty: research, advocacy, educational workshops, and community campaigns.

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Vía Libre (www.vialibre.org.pe/) is a Peruvian NGO, a linking organization of the International HIV/AIDS Alliance, and a Latin American and Caribbean Council of AIDS focal point in Peru. Vía Libre has a regional Latin American and Caribbean technical support hub as a program, in partnership with the International HIV/AIDS Alliance.

Specialty: capacity building, community outreach, and advocacy.

Contact:
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Coordinador
Centro Regional de Asistencia Técnica para Latinoamérica y el Caribe Hispanohablante
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APPENDIX 3

CHECKLIST OF CRITERIA FOR TECHNICAL ASSISTANCE PROVIDER SELECTION

NAME OF TA PROVIDER ORGANIZATION: ___________________________

	Yes	No/Do Not Know	Comments
Technical Qualifications			
Demonstrated knowledge and skills in HIV programming			
Demonstrated knowledge and skills in integrating gender strategies in HIV programming			
Past performance and experience in providing TA and capacity development services			
Past performance and experience in working with NGOs and PEPFAR implementing partners			
Implementation Capacity			
Understanding of the requirements of the TA			
Experienced personnel available for TA during project period			
Motivation and leadership qualities necessary to successfully complete the TA			
Financial and administrative systems in place to manage TA grant and reporting requirements			
Good track record in successful completion of similar TA projects			
Other Considerations			
Geographic proximity to recipient and access to local or regional travel			
Demonstrated ability to work across cultures and languages			
Demonstrated ability and experience in conflict management and resolution			
No evidence of any conflict of interest			
Can commit to a series of TA exchanges over an agreed-on period of time			

APPENDIX 4

TOOLS FOR TECHNICAL EXCHANGE BY TYPE AND ORGANIZATION

Type of Tool	Name/Source	Description/Comments
Overviews on tools	Twinning Center Partnership Toolkit http://www.twinningagainstaids.org/twinningtoolkit/developing.html	The toolkit has tools for six phases of partnership: initialing a partnership, developing a workplan, implementing the program, program monitoring, evaluation of results, and sustainability and dissemination.
	American International Health Alliance (AIHA) Twinning Partnership Toolkit http://www.twinningagainstaids.org/twinningtoolkit/	Same as for Twinning Center.
	AIDS Alliance Capacity Analysis Guides http://www.aidsalliance.org/publication-search.aspx	Guides for capacity analysis in CBOs, NGOs, networks, and rapid assessment guides.
	Raising Voices SASA! Partnership Application Forms http://www.raisingvoices.org/partners-sasa.php	Solicitation for partners includes call for partners, application form, statement of interest form, and selection criteria.
Development and planning	Raising Voices Call for Partners for SASA! http://www.raisingvoices.org/files/CallforPartners.SASA!RegionalRollout.FINAL..pdf Regional Application Form http://www.raisingvoices.org/files/RegionalApplicationForm.SASA!.Final.doc Expression of Interest Form http://www.raisingvoices.org/partners-sasa.php Selection Criteria http://www.raisingvoices.org/files/SelectionCriteriaSASA!rollout.Final.pdf	The SASA! Regional Partnership is a three-year TA agreement between Raising Voices and six selected organizations in the Horn, Eastern, and Southern Africa who are interested in implementing SASA! in their communities. Raising Voices initiates the call for partners, reviews applications and expressions of interest, and selects six partners based on selection criteria. Competency assessment tools are available. Raising Voices provides competency-based TA in four areas (community mobilization, entering a community, local activism, and training/mentoring related to violence against women prevention). Raising Voices is not a donor agency, and the SASA! regional partnership is TA-oriented.
	Twinning Center—Initiating a Partnership http://www.twinningagainstaids.org/twinningtoolkit/initiating.html	A step-by-step process for finding a partner, developing an MOU, funding, etc. Includes links to partner databases and sample MOUs.

Type of Tool	Name/Source	Description/Comments
Assessment	AIDS Alliance—CBO Capacity Analysis Toolkit http://www.aidsalliance.org/includes/Publication/CBO_capacity_analysis_web.pdf	The toolkit is designed to facilitate group discussions with CBOs in assessing their organizational capacity, identifying capacity building needs, planning technical support needed, and monitoring and evaluating the impact of capacity building support. It provides a step-wise process and worksheets for assessing seven areas of organizational capacity and discussion questions to help organizations prioritize needs, plan for action, and identify areas of TA they could benefit from. This process can be completed in four hours, with an internal or external facilitator. This is part of series of organizational capacity analysis toolkits for CBOs, NGOs, networks, and intermediaries.
	AIDS Alliance NGO Capacity Analysis Toolkit http://www.aidsalliance.org/includes/Publication/cat0704_Capacity_analysis_toolkit_eng.pdf	This toolkit can be used to identify capacity building needs, plan technical support interventions, and monitor and evaluate the impact of capacity building. The toolkit is for people and organizations that support NGOs and CBOs responding to HIV in developing countries. The toolkit can be adapted for use by NGOs and CBOs themselves as a framework to facilitate discussion. It includes tools for a one- to two-day workshop, interviews and questionnaires, indicator lists and rating sheets, and a document review checklist.
	AIDS Alliance Network Capacity Analysis—Workshop Facilitation Guide http://www.aidsalliance.org/includes/Publication/Network_Capacity_analysis_Workshop_Guide_final.pdf	The aim of this toolkit is to build the skills required by civil society networks to develop and strengthen their capacity. They can be used by networks to help identify their capacity building needs, plan technical support interventions, and monitor and evaluate the impact of capacity building. They provide a structured approach to generating both quantitative and qualitative information about the situation of the organization at the time of analysis. The resulting outcomes can also be used to track progress when developing capacity. Two forms are available: Workshop Facilitation Guide and Rapid Guide. The Workshop Facilitation Guide can be used, where resources and aspiration allow, to structure, deliver, and report on a two- to three-day workshop. A three-day workshop requires an internal or external facilitator.
	AIDS Alliance Network Capacity Analysis—Rapid Assessment Guide http://www.aidsalliance.org/includes/Publication/Network_capacity_analysis_rapid_web.pdf	The Rapid Assessment Guide can be used to plan, steer, and collect outcomes of a meeting or teleconference where, due to specific needs or limited resources, the aim is to do a more rapid capacity analysis. Meetings last approximately four hours. They can also be used as a questionnaire for individuals or paired interviews.

Type of Tool	Name/Source	Description/Comments
Assessment	AIDS Alliance Intermediary Organizations—Capacity Analysis http://www.aidsalliance.org/includes/Publication/Intermediary_Capacity_analysis.pdf	Intermediaries are organizations providing financial and/or technical support to grassroots HIV organizations. They may be national or regional NGOs or networks. The toolkit focuses on the following: 1. The capacity to identify and select effective and accountable NGOs/CBOs and support them financially using transparent and efficient subgranting mechanisms. 2. The capacity to provide effective and appropriate technical support on HIV to NGO/CBO partners. 3. The capacity to positively influence national and local institutions that have an impact on the HIV epidemic and national responses to it. **Technical Support Provision (Section 5.5):** The capacity to provide effective and appropriate technical support on HIV and other areas to NGO/CBO partners. This capacity area is broken down into "Technical support skills in HIV and organizational development," "Technical support approaches, attitudes, and effectiveness," and "Access to resources and knowledge." It includes a list of indicators of capacity for technical support provision, approaches, attitudes and effectiveness, and access to knowledge and resources. Rating sheets are included, as well as an external review guide, report formats, etc.
	SAT Rapid Assessment Guidelines http://www.satregional.org/content/publications/Resources%20E/Rapid%20assessment%20guid%20Mar03.pdf	Operationalize partner selection criteria to determine the suitability of an organization for partnership with SAT. Potential partners are small and upcoming CBOs with capacity development needs. Takes two to three hours and results in a short report (maximum of three pages). If assessment is positive, SOCAT (org capacity) and SATCOMP (community HIV competence) tools are used with the partner organization as part of a baseline assessment.
	Twinning Center Partner Organizational Capacity Assessment Tool (2006) http://www.twinningagainstaids.org/twinningtoolkit/forms/Assessment_Tool.pdf Partner Organizational Capacity Assessment: Facilitator Workbook (2006) http://www.twinningagainstaids.org/twinningtoolkit/forms/Facilitators_Guide.pdf	A tool for use by Twinning Center staff prior to workplan development with the partner. It is completed in a focus group with the partner organization, with questions and rating scales. It covers background, organization profile, leadership and governance, finances, project design and management, networking and advocacy, and technical capacity. Worksheets for assessment focus group are available.

Type of Tool	Name/Source	Description/Comments
Assessment	AIHA Prevention of Mother-to-Child Transmission Site Assessment http://www.twinningagainstaids.org/twinningtoolkit/forms/Site_Assessment.pdf	
Development of SOW	SOW Writing Guide http://www.rfpsolutions.ca/files/SOW_Writing_Guide2.pdf How to Write the Project SOW http://www.pmhut.com/how-to-write-the-project-statement-of-work-sow Wikipedia—SOW http://en.wikipedia.org/wiki/Statement_of_work AIDSTAR-One—SOW http://ghiqc.usaid.gov/aidstar/docs/09-07-001/rftop_09-07-001.pdf	
	Twinning Center Trip SOW http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Scope_of_Work.pdf	SOW for travel form (basic).
Contracting/MOU	Twinning Center Partnership MOU http://www.twinningagainstaids.org/twinningtoolkit/forms/MOU.pdf	MOU for multiple partners and AIHA.
	Twinning Center Sample Contract http://www.icad-cisd.com/content/pdf/Twinning/Twinning_Sample_Contract.pdf	Partnership agreement for Twinning project—very complete.
	MOU Template http://www.ovw.usdoj.gov/docs/sample-mou.pdf Partnership Development Tool http://srs.snaicc.asn.au/_uploads/rsfil/00389.pdf MOU Writing Guide http://www.safecomprogram.gov/NR/rdonlyres/70169F1E-F2E9-4835-BCC4-31F9B4685C8C/0/MOU.pdf	
	Sample Letters of Understanding http://www.qdros.com/forms/letterofunderstanding.pdf	

Type of Tool	Name/Source	Description/Comments
Workplan development	Twinning Center Developing a Workplan http://www.twinningagainstaids.org/twinningtoolkit/developing.html Workplan Guidelines http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Guidelines.pdf Sample Workplan http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Workplan.pdf Workplan Review Guide http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Review.pdf	1. Includes organization capacity assessment tools (see previous discussion), workplan templates and guidelines, sample budget template. 2. To be used by partner organizations in developing their project workplans. Sections include definition of goals/objectives, implementation plans, exchange trips, collaboration with others, indicators and reporting, and sustainability. 3. To be used by Twinning Center staff as a checklist in reviewing workplan drafts from partners.
Implementation	Twinning Center—Implementing the Program http://www.twinningagainstaids.org/twinningtoolkit/implementing.html	Forms and templates for operational tasks including orienting partners workshop/event planning checklist, travel forms and logistics, press releases, etc. Also has exchange planning, agenda, and SOW.
	Twinning Center Budget Template http://www.twinningagainstaids.org/twinningtoolkit/forms/Budget_Template.xls	An Excel worksheet.
M&E	AIDSTAR-One Results Framework (on AIDSTAR-One project spaces)	

Type of Tool	Name/Source	Description/Comments
M&E	AIHA M&E Tools: Initial Partnership Assessment Form (Community-based Primary Health Care) Partnership Workplan Template and Guidelines Annual Implementation Plan Template and Guidelines Quarterly Progress Report http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/ http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/templates.asp M&E Terminology http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/terminology.asp Performance Indicator Reference Sheet http://www.eurasiahealth.org/toolkits/phc/resources/PHC%20Performance%20Indicator%20Reference%20Sheet.pdf Other M&E Resources http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/resources.asp	
	Twinning Center Program Monitoring http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html http://www.searchitech.org/pdf/p06-db/db-50823.pdf	This section provides examples of several program monitoring tools and reporting instruments that have been developed to support Twinning activities. Resources include Partnership Quarterly Progress Report Form, Trip Report, and Event Report Guidelines and Sample Report. Mostly output forms for accountability.
	Twinning Center Evaluation of Results http://www.twinningagainstaids.org/twinningtoolkit/evaluation.html	This section provides some examples of evaluation tools and surveys that have been developed by and for various Twinning Center partnerships as well as examples of a few actual program evaluations. Resources include AIHA M&E Toolkit for New Partners, AIHA Partnership Self-Assessment Survey, and guidance on evaluation.

Type of Tool	Name/Source	Description/Comments
M&E	Twinning Center AIHA M&E Toolkit for New Partners http://www.twinningagainstaids.org/twinningtoolkit/forms/M&E_Toolkit_for_New_Partners.pdf	This is designed to serve as a reference guide for partnerships and includes a glossary of basic M&E terminology, an overview of AIHA's monitoring and reporting tools, guidelines on development of performance indicators, as well as M&E-related requirements of USAID, AIHA's major funding source. The toolkit also provides selected reference materials partners may use in conducting their own M&E activities, such as survey questionnaires and focus groups. Fairly detailed description of M&E concepts. Includes instructions for conducting focus groups and creating survey questionnaires. Also has links to other resources.
	Twinning Center AIHA Partnership Self-Assessment http://www.twinningagainstaids.org/twinningtoolkit/forms/Partnership_Self-assessment_Survey.pdf	Survey form for use with partners.
	ICAD Evaluation Framework for International Partnerships and Twinning Projects (August 2006) http://www.icad-cisd.com/content/pdf/Twinning/Evaluation_Framework_Twinning.pdf Canadian International Development Agency HIV/AIDS Small Grants Fund: Evaluation Framework (2002) http://www.searchitech.org/pdf/p06-db/db-50823.pdf	For use by recipients of the HIV/AIDS Small Grants Fund. Proposes an evaluation strategy by identifying key evaluation questions, performance indicators, data sources, and collection methods. Not intended to prescribe a specific evaluation process. Understands that Twinning Center partners should design an evaluation process that addresses the project's specific context and environment, which will further the participants' own analyses and understanding of what works and why. Designed to assist the organizations to assess and evaluate their organizational capacity as well as the specific activities undertaken as a result of this funding. The framework will assist organizations to: 1. Determine how the partnership is performing with respect to its objectives, its measurable goals, and its qualitative and quantitative indicators. 2. Determine if the vision and expectations of each partner is being met. 3. Capture the "lessons learned" from the project activities and determine if they can be enhanced. This is an excellent model. Framework is based on three phases: formation and initiation, action and growth, and maintenance and restructuring. Each phase has evaluation questions, indicators/standards, sources, and methods matrices. (Excellent evaluation questions! Good for post-survey.)

Type of Tool	Name/Source	Description/Comments
M&E	Most Significant Change Technique http://www.mande.co.uk/docs/MSCGuide.pdf http://www.adb.org/documents/information/knowledge-solutions/most-significant-change.pdf http://www.createforchildren.org/communication_emergencies/pdf/Tool3.pdf http://www.kstoolkit.org/Most+Significant+Change	Provides definitions and step-wise process for conducting most significant change evaluation. Also includes sample data collection forms and sample stories. Most significant change is a good complement to program logic to create a comprehensive M&E and learning framework.
Reports	AIHA Program Reports http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/	
	Twinning Center Reports http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html Partnership Quarterly Progress Report http://www.twinningagainstaids.org/twinningtoolkit/forms/Quarterly_Progress_Report.pdf Trip Report http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Report.pdf Event Report Guidelines http://www.twinningagainstaids.org/twinningtoolkit/forms/Event_Report_Guidelines.pdf Sample Event Report http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Event_Report.pdf	
Other	USAID Guide for Incorporating Gender Considerations in Family Planning and Reproductive Health Requests for Applications and Requests for Proposals http://www.prb.org/pdf/guideincorpgendrconsid.pdf	
	USAID Tips for an Evaluation SOW http://www.usaid.gov/policy/evalweb/documents/TIPS-PreparinganEvaluationStatementofWork.pdf	

APPENDIX 5

TEMPLATE FOR A MEMORANDUM OF UNDERSTANDING

MEMORANDUM OF UNDERSTANDING

S2S TECHNICAL EXCHANGE

I. GENERAL DESCRIPTION OF PARTNER ORGANIZATIONS

Include description of the TA provider and recipient partners, defining each.

II. DESCRIPTION OF PROJECT

Include goals and objectives and expected benefits of the project.

III. ROLES AND RESPONSIBILITIES

Include commitments of the provider organization for such things as the number of staff on the project, number of training and technical visits during the period of agreement, mode of working with the recipient, commitment to transparency and communication, and recognition of the recipient in any publications.

Include obligations of the recipient for such things as committing staff to the project, communicating in agreed-on ways, collecting monitoring data as described, submitting reports on schedule and in the format agreed to, prioritizing TA during provider visits, and providing necessary resources agreed to for the implementation of the work.

IV. GENERAL TERMS AND CONDITIONS

Include expected length of the project, grounds for one partner or the other to dissolve the partnership, and space for any amendments to the agreement in case a workplan needs a change that affects timing or budgets significantly.

V. SIGNATURES

IN WITNESS WHEREOF, the parties hereto have executed this Memorandum by their duly authorized representatives:

TA Provider

By:______________________________ Date:____________________________

(Name and Title)

TA Recipient

By:______________________________ Date:____________________________

(Name and Title)

TA Facilitator

By:______________________________ Date:____________________________

(Name and Title)

APPENDIX 6

WORKPLAN TEMPLATE

WORKPLAN TEMPLATE

TA Provider Partner:____

TA Recipient Partner:____

TA Facilitating Partner:____

Workplan Period of Performance:___________________________________

Date of Submission:____

This workplan was jointly developed and has been agreed to by representatives of the partnership organizations:

TA Provider

By:____________________________ Date:____________________________

(Name and Title)

TA Recipient

By:____________________________ Date:____________________________

(Name and Title)

TA Facilitator

By:____________________________ Date:____________________________

(Name and Title)

1. PROJECT DESCRIPTION

2. PROPOSED METHODOLOGY

3. KEY ACTIVITIES AND OUTPUTS

Task 1

Proposed Activities

Deliverables

Task 2

Proposed Activities

Deliverables

Task 3

Proposed Activities

Deliverables

IMPLEMENTATION PLAN

	Task/Activity	*TA Provider Role*	*TA Recipient Role*	*Timing*	*Milestone or Deliverable*

IMPLEMENTATION SCHEDULE

	Tasks and Activities	*Weeks in Q1*												*Q2*	*Q3*	*Q4*
		1	2	3	4	5	6	7	8	9	10	11	12			
Task 1																
Task 2																
Task 3																

APPENDIX 7

SAMPLE MONITORING AND EVALUATION PLAN

SOUTH-TO-SOUTH TECHNICAL EXCHANGE FOR INTEGRATING GENDER STRATEGIES

Evaluation Question	Indicator	Data Sources/Method of Data Gathering	Target
Program goal: To increase the capacity of organizations to integrate gender strategies into HIV care, treatment, and prevention through S2S technical exchange.			
What specific TA activities were conducted and completed as planned? Which of the gender strategies were addressed in the training activities conducted?	Number of training activities completed, disaggregated by type of activity (e.g., workshops, study tours, coaching, e-learning). Number of times each of the PEPFAR gender strategies were addressed and how.	MOU and workplan Exchange activity reports End of exchange report	MOU and workplan completed Exchange activity reports and final exchange report submitted
What types of training materials were adapted for the S2S TA exchange? Which of the gender strategies were addressed in the training materials used for the TA?	Number and types of training materials developed/adapted. Ability to adapt training materials and methods to the TA recipient's cultural context and needs. Number of times each of the PEPFAR gender strategies were addressed and how.	Exchange activity reports End of exchange report Review of training materials	Number and type of training materials to be developed for specific gender strategies
Who and how many people attended the training activities?	Number and titles of participants in training activities, disaggregated by sex	Participant lists at training events	Number of female/male/transgender participants anticipated for each training event
To what extent did the training activities meet the expectations of the participants in relation to the gender strategies?	Ratings by participants on degree to which training met their expectations in relation to the gender strategies.	Post-training event survey of participants	Percentage of participants that rate training as meeting their expectations well or very well
To what extent did the TA meet the TA and capacity building needs of the TA recipient?	Ratings by participants on degree to which training met their TA and capacity building needs, as identified in the initial assessment.	Review of results of initial assessment of recipient partner End of exchange survey of participants	Percentage of participants that rate training as meeting their TA needs well or very well

Evaluation Question	Indicator	Data Sources/Method of Data Gathering	Target
What new knowledge, skills, or capacities were gained by both TA providers and TA recipients as a result of the TA?	Self-reported increase in knowledge, skills, or capacities by TA providers and recipients. For example, knowledge, skills, or capacity in the following areas: knowledge about the PEPFAR gender strategies and how they can be integrated into HIV care, treatment, and prevention; knowledge about current country policies and practices in gender-related HIV care, treatment, and prevention; awareness of and ability to address male and female norms on multiple and concurrent sex partners, cross-generational sex, and transactional sex.	End of exchange survey of participants	Percentage of participants that report an increase in knowledge or skills, with specific examples of what they learned
Has the TA resulted in any behavior change at the individual or organizational level of the recipient partner?	Self-reported change in behavior at the individual or organizational level (e.g., changes in organizational policy, practice, programmatic priorities, etc.). Examples include new programmatic priorities, internal educational programs instituted to increase knowledge and awareness of all staff on the gender strategies, and ways to integrate them into the organization's culture.	End of exchange survey of participants	Percentage of participants that report changes in individual or organizational behavior, with specific examples of change
In what way has the TA contributed to more networking or collaboration with other key actors in gender strategy?	Number of new contacts or relationships developed with other key actors in gender strategy (e.g., government ministries, NGOs, civil society organizations, etc.).	End of exchange survey of participants	Percentage of participants that report new contacts or relationships
What was the cost benefit of the TA program?	Actual cost data for implementing the TA program. Costs are related to staff time and proportionate salary, cost of participation in TA activities, office expenses such as space, equipment, and services needed to support the TA activities.	Review of budgets, invoices, receipts, and other administrative documents	Cost of implementing the TA program will be within approved budget or lower

APPENDIX 8

OUTLINE FOR PROGRESS REPORTS

PROGRESS REPORT OUTLINE

Title of Project:________________________________

Name of Organization:___________________________

Period of Performance:___________________________

Date of Report:_________________________________

Submitted by:__________________________________

1. ACTIVITIES AND ACHIEVEMENTS

Describe each TA activity, including purpose and approach used. For each activity, describe what was accomplished (number of people trained, learning achieved, participant reactions, etc.).

2. CHALLENGES

Describe challenges encountered, strategies used to address those challenges, and the outcomes.

3. SUCCESS STORIES

Reflect back and think of an exceptional situation when you felt most excited and proud to be part of the exchange. Describe what happened, who was involved, and what made it so exceptional for you.

4. PLANS FOR NEXT PERIOD

Describe what activities and events are planned for the next period and how that matches with the workplan.

5. BUDGET REPORT (FOR PERIOD ____ TO _____)

Report against the budget submitted and agreed on by budget line item such as salaries, travel, training supplies, and other direct costs. Include a cash report reflecting funds received and funds spent. All reports must include cumulative totals against each line item. Also, include any contributions-in-kind provided by your organization for this project.

APPENDIX 9

ACTIVITY REPORT TEMPLATE

ACTIVITY REPORT

Name and Date of TA Activity:____

Date of Report:_________________________

Submitted by:__________________________

PURPOSE OF TA ACTIVITY:

DESCRIPTION OF TA ACTIVITY:

PARTICIPANTS (ATTACH LIST OF PARTICIPANTS BY NAME AND TITLE):

OUTCOME OF THE TA ACTIVITY (OBSERVED OUTCOME, INCLUDING UNINTENDED OUTCOMES):

RESULTS OF PARTICIPANT EVALUATION OF TA ACTIVITY (TA PROVIDER CAN USE OWN EVALUATION FORM):

FOLLOW-UP PLANS:

APPENDIX 10

OUTLINE FOR FINAL PROJECT REPORT

FINAL PROJECT REPORT OUTLINE

Title of Project:______________________________

Name of Organization:______________________________

Period of Performance:______________________________

Date of Report:______________________________

Submitted by:______________________________

1. INTRODUCTION AND BACKGROUND

A brief summary of the organizations involved and issues that brought about the TA.

2. SUMMARY OF PROJECT GOALS AND OBJECTIVES

How was the project structured? What were the goals and objectives of the TA as designed?

3. DESCRIPTION OF TA PROVIDED

What TA was provided?

4. ANALYSIS

a. Achievements and benefits
b. Factors contributing to success
c. Challenges
d. Good, promising practices and lessons learned.

5. RECOMMENDATIONS FOR FUTURE TA PROGRAMS

Looking forward from the point the recipient has achieved through the current TA, where do they want to be in the future? Is there TA that can help get them there?

6. MOST SIGNIFICANT CHANGE

Looking back over the project period, what was the most significant change that took place as a result of the TA provided? Tell us a story about that significant change. *What happened? Who was involved? Why was the change the most significant for you? What difference did it make?*

7. FINAL BUDGET REPORT

Report against the budget submitted and agreed on by budget line items such as salaries, travel, training supplies, and other direct costs for the entire project. Include a cash report reflecting cumulative funds received and spent. Also include any contributions-in-kind provided by your organization for this project.

APPENDIX 11

POST-EXCHANGE SURVEY FOR TECHNICAL ASSISTANCE RECIPIENT AND PROVIDER

POST-EXCHANGE SURVERY FOR TECHNICAL ASSISTANCE *RECIPIENT*

Name of Respondent (optional):______________________________

Organization of Respondent:________________________________

Date of Survey:____

	Not at all (1)	**To some extent (2)**	**To a great extent (3)**	**Extremely (4)**
To what extent did the TA achieve its stated goals?				
To what extent did the TA contribute to your knowledge, skills, and capacity for integrating gender strategies in HIV programs?				
To what extent was the TA relevant to your work in HIV?				
To what extent will you be able to apply what you learned to your work in HIV?				
In general, how satisfied were you with the TA provided?				

1. Please give specific examples of the benefits of the TA for you personally:
   a. Knowledge gained:____
   b. Skills developed or strengthened:__________________________________
   c. Capacity built:____
   d. Other benefits:____

2. How effective were the following TA methods (rate only those you participated in)?

Type of TA (provider to insert)	**Not at all (1)**	**To some extent (2)**	**To a great extent (3)**	**Extremely (4)**	**N/A**

Comments:____

____

3. In your opinion, what factors contributed to the success of the TA project?

4. Based on your experience, what were the challenges to the success of the TA project?

5. What could be done differently to improve the TA provided?

6. Looking back over the project period, what was the most significant change that took place as a result of the TA provided? Tell us a story about that significant change. *What happened? Who was involved? Why was the change the most significant for you? What difference did it make?*

THANK YOU FOR YOUR PARTICIPATION IN THE SURVEY!

POST-EXCHANGE SURVERY FOR TECHNICAL ASSISTANCE *PROVIDER*

Name of Respondent (optional):______________________________

Organization of Respondent:______________________________

Date of Survey:______________________________

	Not at all (1)	To some extent (2)	To a great extent (3)	Extremely (4)
To what extent did the TA achieve its stated goals?				
To what extent did the TA contribute to the recipients' knowledge, skills, and capacity for integrating gender strategies in HIV programs?				
To what extent was the TA relevant to their work in HIV?				
To what extent will the recipients be able to apply what they learned to their work in HIV?				
In general, how satisfied are *you* with the TA provided?				

1. Please give specific examples of the benefits of the TA for the recipients:
   a. Knowledge gained:______________________________
   b. Skills developed or strengthened:______________________________
   c. Capacity built:______________________________
   d. Other benefits:______________________________
2. How effective were the following TA methods used?

Type of TA (provider to insert)	*Not at all (1)*	*To some extent (2)*	*To a great extent (3)*	*Extremely (4)*	*N/A*

Comments:______________________________

____

3. In your opinion, what factors contributed to the success of the TA project?

4. Based on your experience, what were the challenges to the success of the TA project?

5. What could be done differently to improve the TA provided?

6. Looking back over the project period, what was the most significant change that took place as a result of the TA provided? Tell us a story about that significant change. *What happened? Who was involved? Why was the change the most significant for you? What difference did it make?*

THANK YOU FOR YOUR PARTICIPATION IN THE SURVEY!

APPENDIX 12

POST-EXCHANGE INTERVIEWS WITH RECIPIENTS AND PROVIDERS

QUESTIONS FOR THE *RECIPIENT* OF TECHNICAL EXCHANGE

Date:__________________________

Interviewed:_________________________________

Interviewer:__________________________________

INTRODUCTION

We very much appreciate and celebrate your successful participation in the TA project on ___________________.

We would like to take this opportunity to talk to you about your experience in that project so that we can better understand what worked well and what the challenges were in order to improve future S2S TA exchanges to support implementing partners in HIV.

EXPERIENCE WITH TECHNICAL EXCHANGE

1. What specific TA did you receive or participate in as part of this project?

2. Reflect on how you were connected to the TA provider. In what ways did this connection process work well? In what ways could have this connection process worked better?

3. When you received TA, how did the provider work with you? What did you appreciate most about the TA you received? How could the TA have been more tailored to your needs?

    a. What particular models, programs, checklists, or other materials were used in providing assistance to you? How were they tailored to your situation (organization or culture)?

b. What kind of support did you receive (e.g., training, TA, organizational development)?

4. In what ways did the TA benefit you? What difference has it made in the way you and your organization plan, think about, or implement your HIV work? How did you monitor progress resulting from the assistance?

5. Is there any follow-up with the TA provider planned? If so, what type of follow-up is planned?

6. What current needs do you have that might be addressed by S2S exchanges?

7. In planning for new exchanges, what part of your experience would you want to replicate? What would you change?

8. What were the benefits of S2S TA for your organization? (If this is an organization that has had North-based TA, ask them to contrast.)

9. Are there particular challenges in S2S exchanges a partner organization should be prepared for? Are these different than North-to-South?

10. Reflect on a time when you received excellent TA. What made it so successful? Who was involved? What was the process? What were the outcomes?

11. What would you tell an organization that was looking to collaborate on S2S technical exchange as a recipient?

12. What advice do you have about matching TA providers to partners?

FOR INTERVIEWER

Are there any comments, impressions, or special information about the person or organization interviewed or interview process?

QUESTIONS FOR THE *PROVIDER* OF TECHNICAL EXCHANGE

Date:___________________________

Interviewed:__________________________________

Interviewer:__________________________________

INTRODUCTION

We appreciate your successful participation in the TA project on ________________.

We would like to take this opportunity to talk to you about your experience in that project so that we can better understand what worked well and what the challenges were in order to improve future S2S TA exchanges to support implementing partners in HIV.

EXPERIENCE WITH TECHNICAL EXCHANGE

1. What specific TA did you provide as part of this project?

2. Reflect on how you were connected to the TA recipient. In what ways did this connection process work well? In what ways could have this connection process worked better?

3. How did you decide on the best approach and methods for providing TA to this recipient? What worked well and why? What were the challenges and how did you address them?

4. What particular models, programs, checklists, or other materials were used in providing assistance to the recipient? How were they tailored to the recipient's situation (organization or culture)?

5. Is there any follow-up with the TA recipient planned? If so, what type of follow-up is planned?

6. In planning for TA for others, what part of your experience would you want to replicate? What would you change?

7. What were the benefits of S2S TA for your organization?

8. Are there particular challenges in S2S exchanges a partner organization should be prepared for? Are these different than North-to-South?

9. Reflect on a time when you were really excited about the TA process. Tell us what happened. What made it so successful? Who was involved? What was the process? What were the outcomes?

10. What would you tell an organization that was looking to collaborate on S2S technical exchange as a recipient?

11. What advice do you have about matching TA providers to partners?

FOR INTERVIEWER

Are there any comments, impressions, or special information about the person or organization interviewed or interview process?

For more information, please visit aidstar-one.com.

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