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Strengthening High Impact Interventions  
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# IMPROVING HIV OUTCOMES: FRAMEWORK AND TOOLKIT FOR SOUTH-TO-SOUTH TECHNICAL ASSISTANCE IN THE PEPFAR GENDER STRATEGIC AREAS

JULY 2015





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## AIDSFree

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## Abstract

This framework and its accompanying tools provide a step-by-step process for linking south-based providers of technical assistance to south-based organizations interested in assistance in one or more of the PEPFAR gender strategic areas. The document contains a variety of tools and guidelines for facilitating technical exchanges, planning and implementing the assistance, monitoring progress and evaluating outcomes, and building a foundation for a long-term relationship. Together, the framework and toolkit serve as a roadmap and resource for all partners involved in a technical exchange, and allow for tailoring and adaptation to a variety of circumstances while adhering to guidelines for good practice.

## Acknowledgments

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# ACRONYMS

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AIDS	acquired immunodeficiency syndrome
CBO	community-based organization
GBV	gender-based violence
HIV	human immunodeficiency virus
M&E	monitoring and evaluation
MOU	memorandum of understanding
NGO	nongovernmental organization
PEPFAR	U.S. President's Emergency Plan for AIDS Relief
S2S	south-to-south
SOW	scope of work
USAID	U.S. Agency for International Development





# INTRODUCTION

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## **Controlling the Epidemic: Delivering on the Promise of an AIDS-free Generation**

Phase 3 of the U.S. President's Emergency Plan for AIDS Relief (PEPFAR), includes five action agendas focused on *Impact, Efficiency, Sustainability, Partnership, and Human Rights* to achieve the goal of controlling the HIV epidemic and achieving an AIDS-free generation.

The *Human Rights* agenda addresses gender norms and inequities to support better health outcomes through improved access to and uptake of comprehensive HIV services.

The *Partnership* agenda includes the principle of working with civil society, people living with HIV, faith-based organizations, and others for effective mobilization, coordination, and efficient use of resources to expand high-impact strategies—thus saving more lives sooner.

A key strategy for maximizing financial resources and strengthening human resource capacity within and across countries is south-to-south (S2S) technical assistance, defined as an exchange of expertise and resources between two or more developing countries on a bilateral, regional, subregional, or interregional basis.<sup>1</sup>

The **2013 PEPFAR updated gender strategy** focuses on five key areas listed in Box 1 and responds to emerging evidence and needs to help programs recognize the critical role gender norms and gender inequality play in the HIV epidemic; ensure equity in access to HIV programs and services; and take concrete steps to respond to the unique needs of different populations. This strategy includes a focus on capacity building for country-level partnerships to achieve sustainability in the HIV response.

### **Box 1. PEPFAR Gender Strategic Areas**

1. Provide gender-equitable HIV prevention, care, treatment, and support
2. Implement gender-based violence (GBV) prevention services and provide services for post-GBV care
3. Implement activities to change harmful gender norms and promote positive gender norms
4. Promote gender-related policies and laws that increase legal protection
5. Increase gender-equitable access to income and productive resources, including education.

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<sup>1</sup> United Nations Development Programme. 2015. "What is South-to South Cooperation?" Available at [http://ssc.undp.org/content/ssc/about/what\\_is\\_ssc.html](http://ssc.undp.org/content/ssc/about/what_is_ssc.html) (accessed May 2015).

This framework and toolkit serve to guide PEPFAR country teams to facilitate the planning and implementation of S2S technical assistance to advance PEPFAR's Human Rights and Partnership agendas through a cost-effective approach that builds capacity of local organizations in the PEPFAR gender strategic areas to improve HIV outcomes and strengthen efforts to control the HIV epidemic.

# HOW TO USE THIS FRAMEWORK AND TOOLKIT

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This document is comprised of two parts:

**Part 1: Framework** outlines a dynamic, *step-wise process* for facilitating S2S technical assistance in the PEPFAR gender strategic areas that builds on existing strengths and new knowledge to contribute to a long-term, mutually beneficial relationship between south-based organizations. The ultimate goal of this technical assistance is to improve HIV outcomes by addressing harmful gender norms and inequalities that hinder full realization of HIV prevention, care, and treatment. This Part is organized into four steps, that provide guidance throughout the S2S technical assistance process.

**Part 2: Tools** provides the 15 tools that are referenced in Part 1.

Internal and external hyperlinks are embedded throughout this document. Boldface, red, italicized text like ***this*** is an **internal hyperlink**. Internal links allow the reader to jump to particular sections within the document.

Bold-face, blue, underlined text like **this** is an **external hyperlink**. External links allow the reader to navigate away from the toolkit in order to access additional, external resources. **Note:** internet access is required to use external links.

Following provides an overview of each step of the framework and the corresponding tools:

## Step 1. Identifying S2S Technical Exchange Partners

S2S technical assistance exchanges entail a collaborative process between partners for developing, implementing, and evaluating technical exchange activities to ensure that they are mutually beneficial and contribute to sustainable outcomes and relationships. Maximizing the benefits of a technical assistance exchange requires that all collaborators dedicate time and resources for the careful identification, selection, matching, and orientation of partners. **Step 1** of the framework provides guidelines and refers to tools to help the facilitating partner to conduct an initial assessment of the technical assistance needs and suitability of a potential recipient, and to develop an initial *statement of work (SOW)* to guide the selection of a technical assistance provider with the requisite skills and qualifications.

## Relevant tools:

***Tool 1: Participatory Assessment Tool for Potential Technical Assistance Recipient***

***Tool 2: Checklist: Criteria for Assessing Suitability of Potential Technical Assistance Recipient***

***Tool 3: Draft Statement of Work and Statement of Work Template***

***Tool 4: List of Potential Technical Assistance Providers***

***Tool 5: Checklist of Criteria for Technical Assistance Provider Selection***

## Step 2. Development and Planning

Once the partners have been identified and engaged, the facilitator can organize an initial conference call to orient partners to the S2S framework, tools, and the step-wise implementation process. In **Step 2**, the technical assistance provider and recipient need to arrive at a common understanding of the scope of the technical exchange. This should be based on an in-depth assessment of the recipient's technical assistance needs and capacity, and develop a **memorandum of understanding (MOU)** and a **workplan** to guide implementation. The collaborative plan should include a **monitoring and evaluation system**, a protocol for project management, and identification of key personnel for maintaining communications and financial and administrative management of the technical exchange. Tools and templates for these tasks are included in **Part 2**.

## Relevant tools:

***Tool 6: Tools for Technical Exchange by Type and Organization***

***Tool 7: Technical Assistance Needs and PEPFAR Gender Strategic Areas***

***Tool 8: Template for Memorandum of Understanding***

***Tool 9: Workplan Template***

***Tool 10: Guidelines for Developing a Monitoring and Evaluation Plan and Sample Monitoring and Evaluation Plan***

## Step 3. Implementation

The facilitator can play an important supportive role during the implementation of the workplan developed in Step 2. **Step 3** outlines some of the ways in which the facilitator can support

implementation, including organizing a midpoint conference call to monitor progress, address challenges, and encourage reflection and learning to inform any mid-course corrections or modifications.

### **Relevant tools:**

***Tool 11: Outline for Progress Reports***

***Tool 12: Activity Report Template***

***Tool 13: Outline for Final Project Report***

## **Step 4. Sustaining Progress and Extending Benefits**

The benefits of a S2S technical assistance exchange can extend beyond the transfer of skills and knowledge. These exchanges can build relationships, promote systems-level change, create a community of practice, or establish new leadership in support of the PEPFAR gender strategic areas. **Step 4** refers users to tools for facilitating reflection and learning with all partners after the exchange, to assess the benefits of the exchange and explore ways to continue the collaboration in strengthening the PEPFAR gender strategic areas.

### **Relevant tools:**

***Tool 14: Post-Exchange Survey for Technical Assistance Recipient and Provider***

***Tool 15: Post-Exchange Interviews with Recipient and Provider***



# **PART 1: FRAMEWORK**

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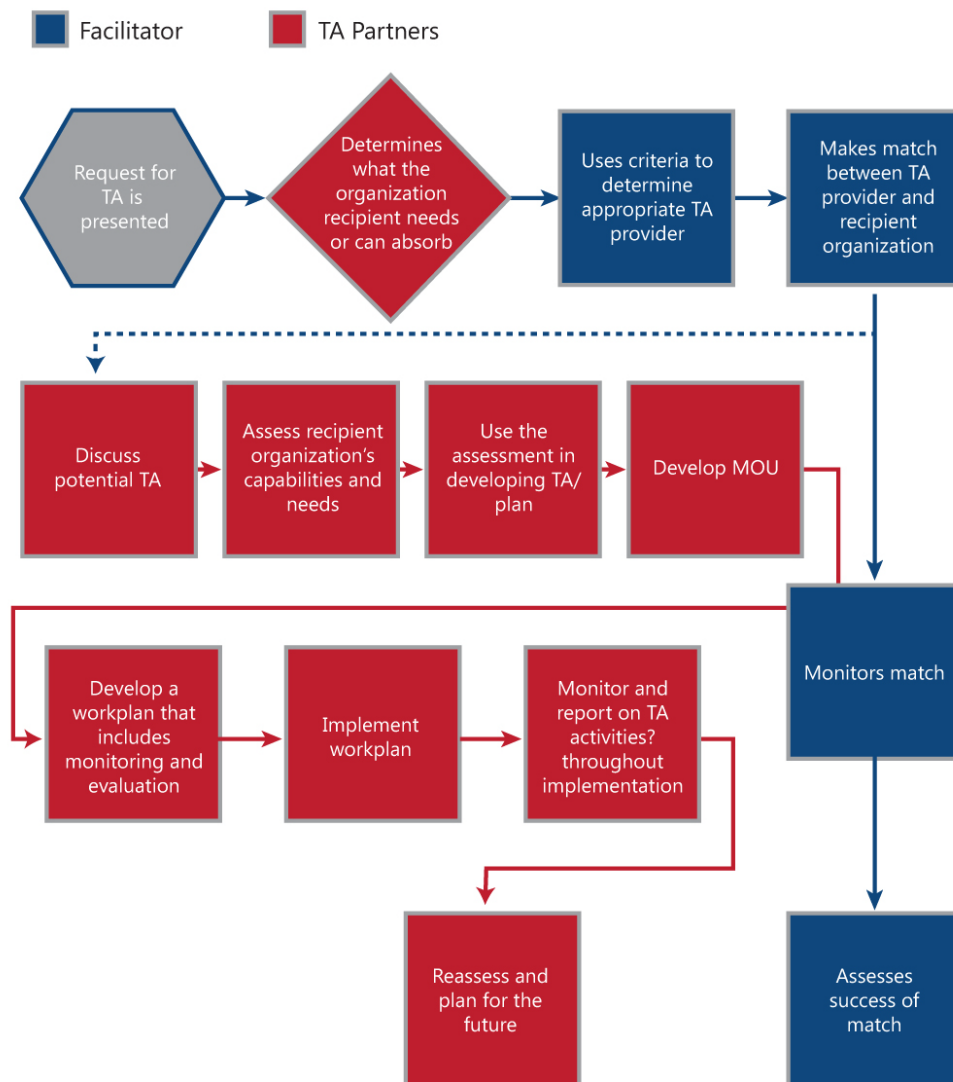




# STEP-WISE APPROACH TO S2S TECHNICAL ASSISTANCE EXCHANGE

This Part describes each step of the S2S exchange in detail and references tools for performing the work at each stage. **Figure 1** illustrates the step-wise process and the respective roles of partners in a S2S technical assistance exchange. All parties in the S2S technical exchange can use the tools to facilitate coordination and collaboration.

**Figure 1. Steps for Facilitating South-to-South Technical Assistance Exchange**



# STEP 1: IDENTIFYING THE PARTNERS

Technical assistance exchanges can be demand-driven (through identification of a need by the PEPFAR country team or an implementing partner) or supply-driven (with technical assistance providers offering services for capacity building and organizational strengthening). Exchanges 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. Regardless of the pathway leading to the exchange, a successful S2S partnership depends on careful identification, selection, and orientation of partners to the technical exchange process.

## Finding a Facilitator

The PEPFAR country team will most likely require a facilitator (an implementing partner or funding mechanism) throughout all phases of the development and planning of the technical exchange, including identifying the partners, orienting them on the framework and toolkit, and evaluating the process. During Step 1 this Step, the facilitator can support the process in the following ways:

1. Supporting the PEPFAR country team to conduct an initial, participatory assessment of the potential technical assistance recipient to determine the organization's technical assistance needs and capacity to engage in a S2S technical exchange
2. Helping the technical assistance recipient and PEPFAR country team to develop a SOW that reflects the technical assistance needs identified during the participatory assessment
3. Working with the PEPFAR country team to identify a technical assistance provider with expertise that matches the needs and capacity of the technical assistance recipient
4. Awarding and managing a subcontract or grant to the technical assistance provider that clearly states the objectives, scope, and deliverables expected from provider and recipient organizations, and that funds the cost of providing the exchange
5. Facilitating communication and collaboration throughout the S2S exchange, including periodic conference calls to coordinate planning, monitor progress, and address challenges as they arise.

## Identifying a Technical Assistance Recipient

Conducting an initial, exploratory dialogue with organizations seeking technical assistance can be crucial for identifying recipient organizations that are in the best position to absorb and use the benefits of a technical exchange to advance the PEPFAR gender strategic areas. This dialogue includes an assessment of the organization's readiness to engage in a technical

exchange in terms of leadership support, staff availability, infrastructure to support activities, and ability to integrate learning into program planning and organizational policies. The dialogue can also serve as a self-assessment for the organization in preparation for possible participation in a technical exchange.

**Tools 1 and 2** are for *conducting a participatory assessment* and developing *criteria for evaluating a potential recipient's readiness* to participate in a technical exchange. This information can help both the PEPFAR team and the facilitator to understand the organization's capabilities and technical needs, so as to develop the most effective technical assistance possible. This process may also influence the selection of the technical assistance provider best suited to the needs identified.

## Developing the Statement of Work

Once the initial participatory assessment with the technical assistance recipient has been completed, the team must develop a SOW that reflects the context, capacity, and needs of the recipient organization. Ideally, the technical assistance recipient takes the lead in developing the SOW, with input from the PEPFAR country team and facilitator. At a minimum, the SOW should:

- Define the purpose of the technical assistance
- Establish clear goals and objectives for the technical assistance
- Define the period of performance
- Identify the 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
- Outline a monitoring, evaluation, and reporting strategy based on stated goals, expected results, and outcome indicators.

**Tool 3** includes a *template for a SOW and sample SOW* written specifically for technical assistance in integrating the PEPFAR gender strategic areas.

## Selecting the Technical Assistance Provider

Selecting a qualified and appropriate technical assistance provider requires evaluating the candidate's technical expertise and capacities within the PEPFAR gender strategic areas to find the best match for delivering the technical assistance cost-effectively. Many facilitating organizations have created lists of experienced technical assistance provider organizations or consultants who meet the criteria for specific topical or technical areas.

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

- Understanding of the technical assistance required, and the goals of the exchange
- Technical expertise in the requested area(s)
- Organizational capacity to provide the technical assistance (e.g., availability of a technical team, infrastructure to support the technical assistance, and specific experience in the PEPFAR gender strategic areas as they relate to HIV projects and activities)
- Motivation and leadership qualities necessary for successful completion of the technical assistance
- No evidence of potential conflicts of interest, and/or strategies in place to address any conflicts that may arise.

**Tool 4** provides a *list of potential technical assistance providers* for the PEPFAR gender strategic areas, along with basic information about each organization. These organizations were selected based on their prior experience in providing S2S technical assistance in one or more of the PEPFAR gender strategic areas relevant to HIV prevention, treatment, or care. This list can be expanded and modified in-country as additional information becomes available. **Tool 5** contains a *sample list of criteria for selecting a technical assistance provider*.

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

- **Sustainability.** S2S technical exchanges are not intended to be one-time technical assistance events; they are intended to build a lasting relationship between south-based organizations. Thus, it is best to design the technical exchange between only two organizations: one technical assistance provider and one technical assistance recipient. Previous or existing relationships between potential technical assistance partners may increase the likelihood of a sustainable relationship, and this can be a factor to consider in selecting the provider and recipient organizations. This exchange is not intended to be a “quick fix” for short-term benefit; it is meant to serve as part of a long-term plan to build partnerships and ongoing relationships within a network of people and organizations working toward common goals.
- **Compatibility.** Matching the technical assistance provider to the needs and capabilities of the technical assistance recipient is critical and requires sufficient time to be completed properly. It is important to ensure that the two organizations are compatible and aligned with each other’s objectives and end goals. This entails a thorough assessment of each partner's capacity to provide or receive the technical assistance and make good use of its

benefits not only in this one instance, but over the longer term, so that the match contributes to broader advancements in the PEPFAR gender strategic areas.

- **Suitability.** Language and culture may not necessarily be barriers to a successful match. However, both organizations must have experience in working across cultures; understand the implications for differences in communication, learning styles, and relationships; and be prepared to address these differences if needed.
- **Geography.** Proximity may have a direct bearing on budget requirements and the types of possible training or capacity building modalities (e.g., technical assistance, mentoring, and coaching visits).
- **Responsibility.** If the S2S technical assistance partnership is to succeed, both organizations must be willing to commit sufficient resources, personnel, and time to the exchange. It is important to specify from the beginning what funding is available, what resources are expected from each partner to support exchange activities (e.g., travel, facilities, communication costs, etc.), and what the financial implications are. To ensure continuity, key personnel should be able to commit to the entire duration of the agreed-on SOW. Similarly, the exchange must also engage personnel who have the means and authority to take learning from the exchange and apply it within their organization. It is highly recommended that a Point of Contact be identified from each of the participating organizations, including the PEPFAR country team, technical assistance recipient, and technical assistance provider, to ensure timely and consistent communications among all parties throughout the exchange.

# STEP 2: DEVELOPMENT AND PLANNING

## Conducting an On-Site Assessment

Once a match has been made, it is important for the facilitator to bring the partners together for an initial meeting or conference call. This allows for introductions and orientation to the S2S technical exchange framework and toolkit, including how all partners can use the toolkit as a guide and resource for each step of the exchange. During this call, the technical assistance provider and recipient could also agree on a time for an on-site, collaborative assessment of the recipient organization's needs and strengths in the requested area(s) of technical assistance. See Box 2 for a suggested agenda.

This on-site assessment builds on the participatory assessment conducted in **Step 1** and provides an opportunity for clarifying expectations, defining roles and responsibilities, and developing a common understanding and

vision of the technical exchange. The results of this collaborative assessment can be used to inform the **MOU** and **workplan**, including a system for monitoring and evaluating progress toward agreed-upon goals. Most importantly, an on-site assessment can be a good opportunity for the technical assistance partners to begin engaging with each other and building a mutually beneficial, long-term relationship that will last beyond the technical exchange itself.

The on-site assessment can examine a number of organizational elements through interviews, document review, focus group discussions, and other methods, to enhance or verify information already obtained in the initial exploratory assessment by the facilitator. These include:

- Governance structure and function
- Financial systems in place for managing grants in an accountable and transparent manner
- Human resources, including the type and availability of staffing required
- Prior experience with the PEPFAR gender strategic areas
- Ability to access or leverage other funding to continue support of the PEPFAR gender strategic areas
- Partnerships and networking with key actors and stakeholders working in one or more of the PEPFAR gender strategic areas.

### **Box 2. Initial Team Conference Call**

**Purpose:** To introduce partners and orient them to the S2S Framework and Toolkit as a resource to facilitate collaborative planning

#### **Suggested Agenda:**

1. Introductions and background on participating organizations
2. Overview of the S2S activity and orientation to the framework and toolkit
3. Initial discussion on scope of work
4. Next steps and responsible persons.

**Tool 6** provides a *list of existing tools* developed by organizations implementing S2S technical assistance exchanges that may be used during the on-site assessment and planning process. These are organized by categories corresponding to the stages of the technical exchange.

When the assessment is complete, the technical assistance recipient and provider may need to revisit the provider's *SOW* to tailor it to the tasks identified during the assessments. The table in **Tool 7** helps the partners *specify technical assistance needs* in the five PEPFAR gender strategic areas; this information can be used to refine the *SOW* and plan technical assistance activities. (The technical assistance needs listed in this tool are for illustrative purposes only, to help partners develop their own set of needs and priorities). This step is critical in reaching a common understanding of which of the PEPFAR gender strategic areas are most needed by the technical assistance recipient to better address gender norms and gender inequalities that hinder full achievement of PEPFAR's HIV prevention, treatment, and care goals and objectives.

## Creating a Memorandum of Understanding

After completing the on-site assessment and clarifying the recipient's technical assistance needs, the partners can develop and agree on an MOU that details expectations, roles, timelines, and deliverables for the technical assistance exchange (see **Tool 8** for an *MOU template*). An MOU should include, for example, a description of the exchange, a list of commitments from the provider, and obligations on the part of the recipient. Most providers will have an established MOU format.

## Developing the Workplan

The workplan is a collaborative planning tool that helps the provider and recipient organizations identify the overall goal and specific objectives of the technical assistance that will achieve their shared objectives. The workplan should be based on a realistic timeframe, allowing adequate time for both the technical and administrative elements of a technical exchange to meet contractual and administrative requirements. The plan should also include steps for gathering data needed to monitor and evaluate progress and meet reporting requirements.

The workplan should represent a joint effort by the two organizations; receive endorsement from key team members on both sides; and reflect efficient use of resources consistent with the budget and MOU. Unlike the contract, which states requirements that must be met, the workplan should be flexible, with built-in check points to allow for mid-course adjustments—for example, in the event that an organization needs further work in a focus area that was not captured during the assessment. See **Tool 9** for a *workplan template*.

## Developing a Monitoring and Evaluation Plan

As part of the development and planning process, the partners need to devise a way to monitor progress toward goals, both for accountability and to inform any midcourse changes needed to enhance the effectiveness of the exchange. A monitoring and evaluation (M&E) system can also support learning and help to identify promising practices that should be replicated in future exchanges. The extent and level of detail of the M&E plan depend in part on the scope of the technical exchange and the needs and capacities of the participating organizations for documentation, evaluation, and reporting. A key concept presented in the [USAID Evaluation Policy](#) is that M&E should be integrated into the project design from the beginning to support informed decision-making, accountability, and learning. **Tool 10** provides *guidelines for developing an M&E plan* for program planning and implementation, and a sample *M&E plan*.

## Financial and Administrative Management of the Technical Exchange

Both technical assistance provider and recipient organizations must have financial and administrative systems and personnel in place for effective execution and management of the technical exchange. Necessary capacities include, but are not limited to, budget preparation and monitoring, grants review and administration, management of different funding mechanisms and international funds transfers, procurement, and disbursement procedures. Also, both organizations must have financial and administrative systems of sufficient overall integrity to support the technical exchange; adequate administrative structures are essential to the effective management of a technical exchange, and form part of the selection criteria for both technical assistance providers and recipients. Also, both parties must make allowances, and have contingency plans available, for handling unexpected delays, bureaucratic procedures, communication difficulties, and other challenges that could derail or constrain the implementation of the agreed-upon workplan.



## STEP 3: IMPLEMENTATION

Implementation should follow the workplan developed and agreed upon in **Step 2**. This should be a working document, in case a strategy needs to be revised based on experience on the ground, changing priorities, or other organizational issues.

### Facilitator Role During Implementation

During the implementation phase, the facilitator's primary role is to ensure that participating organizations are accountable to their commitments (e.g., **MOU, SOW**), and to support the process through formative feedback and collaborative problem-solving as unforeseen challenges arise. This can be done in several ways, including:

- Providing logistical assistance, such as help with planning for meetings, if necessary.
- Ensuring timely disbursement of funds and resources according to plan.
- Reviewing the progress reports required by the SOW and workplan. These may be **periodic progress reports (Tool 11)** or quarterly or midterm reports, depending on what the facilitator needs in order to monitor the technical assistance.
- Reviewing **technical assistance activity reports (Tool 12)** depending on the level of information being collected to monitor progress.
- Facilitating communications among all parties, including a midpoint meeting or conference call to monitor progress, support learning, and engage partners in collaborative problem-solving. See Box 3 for a suggested agenda.
- Reviewing a final report (prepared by the technical assistance provider) that summarizes the S2S exchange achievements, challenges, and lessons learned. This should include a full accounting of the budget and costs incurred during the implementation of the technical assistance project. A **template for the final report** is provided as **Tool 13**.

#### **Box 3. Midpoint Team Conference Call**

**Purpose:** To monitor progress, facilitate joint problem solving, and agree on mid-course corrections if needed

**Suggested Agenda:**

- *Update on the workplan:* What has been completed? What remains to be done? What is the timeline?
- *Successes and Challenges:* What is going well? What challenges need to be addressed? What can be done to ensure success?
- *Next steps:* What are the next steps as we finalize this activity? What is the evaluation plan for the end of this activity?

## STEP 4: SUSTAINING PROGRESS AND EXTENDING BENEFITS

Participation in a S2S technical exchange may be a new experience for many organizations, and reflection on outcomes, processes, and lessons learned can benefit the participating organizations along with PEPFAR country teams and other organizations interested in sponsoring future exchanges.

For participants, the benefits of a S2S technical exchange can extend beyond the transfer of technical knowledge and skills. These exchanges can strengthen partners' ability to engage in future exchanges, and to participate more actively and with greater confidence in the global dialogue on the PEPFAR gender strategic areas. Exchange participants should be encouraged to look beyond the specific technical exchange, and to reflect on how the exchange has enhanced, or could enhance, their organization's capacity to contribute to sustainable change in the PEPFAR gender strategic areas. Examples could include establishing networks and partnerships for sharing information and future collaboration; leveraging existing funds for the integration of PEPFAR gender strategic areas; and promoting an enabling policy environment at local, provincial, and national levels. These and other possibilities can be part of the conversation during the reflection sessions to stimulate innovative thinking and future planning.

For the PEPFAR country team, the S2S technical assistance exchange process can provide a better understanding of how this type of exchange builds the capacity of implementing partners to integrate the PEPFAR gender strategic areas into their projects and activities. It is important for the PEPFAR country team to understand the information needed to make an informed choice about continuing support for S2S exchanges, how to make them better, and how to define PEPFAR's strategic role in leveraging local resources for more effective achievement of the five PEPFAR gender strategic areas.

**Reflective evaluation of the technical assistance** should address four main areas of inquiry:

1. To what extent has the technical exchange achieved the intended goals and objectives of increasing capacity to integrate one or more of the PEPFAR gender strategic areas into PEPFAR projects?
2. What are the outcomes (intended and unintended) of the S2S technical assistance exchange in capacity building, relationship building, and networking?
3. Are the results of the technical assistance exchange worth the investment of resources?
4. What promising practices and lessons can be learned from the experience to guide decisions about the way forward?

To address these questions, PEPFAR country teams may wish to employ any of the following methods:

- Bring all partners together (face-to-face or virtually) for a collaborative, reflective learning session to identify good and promising practices and lessons learned, and facilitate planning for future S2S technical assistance exchanges. See Box 4 for a suggested agenda for the final team conference call.
- Conduct an end-of-collaboration survey of organizations participating in the S2S technical assistance 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” resulting from these exchanges. **Tool 14** contains a *sample survey for the recipient and provider* involved in the technical exchange.
- Interview representatives of technical assistance providers and recipients for a qualitative, in-depth review of the technical assistance experience to identify what worked well, what could be done better, and lessons learned for future application. **Tool 15** contains *sample interview protocols*.
- Conduct a cost-effectiveness analysis to inform future funding decisions on S2S exchanges.
- Publish or disseminate the results of the learning sessions and ensure that lessons learned from each S2S technical assistance exchange are transferred to future exchanges, and contribute to the broader body of knowledge on effective S2S exchanges for other donors, technical assistance providers, and technical assistance recipients.

#### **Box 4. Project End Conference Call**

**Purpose:** To provide an opportunity for reflection and learning on benefits of activity and ways to extend the relationship

#### **Suggested Agenda:**

1. *What have we accomplished?* Share benefits of activity from each participant’s perspective.
2. *Where we are now?* Reassess current status, where we’d like to go, and suggestions on how to get there.
3. *What is one thing that stands out?* Reflect on one thing that stands out from the technical exchange experience.
4. *How do we sustain the benefits and extend the relationship?* Begin planning for the future.

## Summary of Key Points

- This S2S framework and toolkit can be used to facilitate planning and implementation of a S2S technical exchange to advance one or more of the PEPFAR gender strategic areas.
- The process is most successful when all partners are oriented to the framework and toolkit from the beginning, and collaborate on each step of the process. How and when technical assistance partners are briefed can have a direct bearing on how they understand the technical exchange activity and how it is implemented.
- S2S exchanges offer substantial benefits for each participating partner, including the technical assistance recipient, the technical assistance provider, PEPFAR country teams, and facilitating organizations that may sponsor future such exchanges. An end-of-project reflection process can help harvest the learning and inform future strategies and decisions on S2S technical exchanges.
- Participants are encouraged to think about the benefits of a S2S technical exchange that extend beyond the exchange itself to foster lasting relationships and enable future dialogue to promote the integration of PEPFAR gender strategic areas.

# PART 2: TOOLS

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# TOOLS

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This section provides the following tools, all of which are referenced in **Part 1**:

**Tool 1:** Participatory Assessment Tool for Potential Technical Assistance Recipient

**Tool 2:** Checklist of Criteria for Assessing Suitability of Potential Technical Assistance Recipient

**Tool 3:** Draft Statement of Work and Statement of Work Template

**Tool 4:** List of Potential Technical Assistance Providers

**Tool 5:** Checklist of Criteria for Technical Assistance Provider Selection

**Tool 6:** Tools for Technical Exchange by Type and Organization

**Tool 7:** Technical Assistance Needs and PEPFAR Gender Strategic Areas

**Tool 8:** Template for a Memorandum of Understanding

**Tool 9:** Workplan Template

**Tool 10:** Guidelines for Developing an M&E Plan

**Tool 11:** Outline for Progress Reports

**Tool 12:** Activity Report Template

**Tool 13:** Outline for Final Project Report

**Tool 14:** Post-Exchange Survey for Technical Assistance Recipient

**Tool 15:** Post-Exchange Interviews with Recipients and Providers





# TOOL 1: PARTICIPATORY ASSESSMENT TOOL FOR POTENTIAL TECHNICAL ASSISTANCE RECIPIENT

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**Name of Organization:**

**Date(s) of Participatory Assessment:**

**Participants:**

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## 1. Introduction to Assessment Tool

This participatory assessment tool is part of the *AIDSFree South-to-South (S2S) Framework and Toolkit* for PEPFAR and USAID teams to engage partners in S2S technical exchanges to strengthen one or more of the PEPFAR gender strategic areas (see Box 1) with the goal of improving HIV outcomes by addressing harmful gender norms and inequalities that hinder full realization of HIV prevention, care, and treatment.

This participatory assessment tool is meant to be used while facilitating an exploratory dialogue with an implementing partner interested in receiving technical assistance in one or more of the PEPFAR gender strategic areas.

The items below serve as prompts in the dialogue. This tool should not be used as a survey instrument, but as a guide for a discussion to understand the needs and capacity of the potential technical assistance recipient organization, and to inform planning and decision-making.

Information can be entered directly into the fields, saved, and printed.

### **Box 1. PEPFAR Gender Strategic Areas**

1. Provide gender-equitable HIV prevention, care, treatment, and support
2. Implement gender-based violence (GBV) prevention services and provide services for post-GBV care
3. Implement activities to change harmful gender norms and promote positive gender norms
4. Promote gender-related policies and laws that increase legal protection
5. Increase gender-equitable access to income and productive resources, including education.

## 2. Organizational Profile

- a. Type of organization registered as (e.g., governmental organization, non-governmental organization, community-based organization, faith-based organization, private sector organization, etc.)
- b. Locations in country (name of city and region or state)

Main office:

Field offices:

- c. Please indicate the total number and location of all staff/volunteers, and the number who would be available to participate in the technical exchange.

Type of Staff	Located in Main Office	Located in Field Offices	Number who would be available to participate in the technical exchange
Administrative/management			
Program/technical			
Operational support			
Volunteers			
Others			
<b>TOTAL NUMBER OF STAFF/VOLUNTEERS</b>			

- d. What current activities are funded by PEPFAR?

### 3. Vision of the Technical Exchange

Imagine that the S2S technical exchange has just finished. It was a huge success and achieved all that you had hoped for. Please describe what enabled the exchange to be so successful. What changed for your organization? What happened? Who was involved? What are people saying about the technical exchange and about your organization now?

### 4. Technical Assistance Needs

- e. Not all five PEPFAR gender strategic areas may be relevant to your organization's work. To help us understand your organizational context and technical assistance needs better, please answer the following questions.

What is your organization currently doing to integrate the PEPFAR gender strategic areas?

In what areas would you like technical assistance to strengthen the integration of one or more of the PEPFAR gender strategic areas?

Why are these areas important to your organization? How would strengthening these areas make a difference to your organization and its projects and activities?

## 5. Technical Assistance Activities

- f. What kinds of technical assistance activities would best meet the needs you have described so far? Technical assistance could be staff training, stakeholder workshops, field visits, document review, policy development, advocacy training, monitoring and evaluation, grant preparation and management, etc. A final list of activities will emerge from more dialogue with you and clarification of your organization's technical needs.

- g. What challenges do you anticipate in implementing the above technical assistance activities? (e.g., security, transportation, decentralized staff, local language, etc.)

- h. How might these challenges be best addressed to ensure a successful technical exchange?

## 6. Readiness for Technical Exchange

- i. What kinds of technical exchanges has your organization been involved in on any topic, and south-to-south or north-to-south? What was your organization's role, and what did your organization contribute to the process?

- j. To what extent and in what ways has your senior management and leadership shown support for a technical exchange to strengthen integration of PEPFAR gender strategic areas? What additional support would you need from your organization's senior management and leadership to ensure that the proposed technical exchange would be successful?

- k. What organizational structures, financial and administrative systems, management, and accountability procedures are in place to ensure efficient and effective implementation of a technical exchange? What additional systems or procedures would be needed to effectively manage the administrative aspects of the proposed technical exchange?

- l. What resources can the organization provide to support this technical exchange and related activities? (e.g., additional funding, conference or training facilities, good internet connectivity, transportation, local translators, etc.)

## **7. Ability to Use and Extend Long-Term Benefits and Relationships**

- m. What is your organization's experience or capacity in monitoring and evaluating for organizational learning and adapting?

- n. How might your organization use the outcomes and learning from this technical exchange? What would need to be in place for you to make best use of and apply the learning from the technical exchange?

- o. What prior experience does your organization have in building partnerships and networking with other organizations at local, regional, national, or international levels?

- p. What prior experience does your organization have in promoting or advocating for changes at the local, regional, national, or international levels?

**8. Point of Contact**

Please provide the name, title, and contact information of the person in your organization who will be the primary Point of Contact for the proposed technical exchange.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Mobile: \_\_\_\_\_

# TOOL 2: CHECKLIST OF CRITERIA FOR ASSESSING SUITABILITY OF POTENTIAL TECHNICAL ASSISTANCE RECIPIENT

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**Name of Organization Assessed:**

**Date of Assessment:**

**Respondent(s):**

**Introduction:** This checklist can be used by PEPFAR and USAID teams to assess the overall suitability of an organization to participate in a S2S technical exchange as a technical assistance recipient. Information garnered from the Participatory Assessment Tool (Tool 1), interviews, site visits, document review, and other sources can be used to arrive at a rating of the following items. Reviewer comments can include reasons for their ratings and/or suggestions on areas for strengthening. The ratings and comments can thus serve as feedback to the candidate organization as to what areas could be strengthened to improve the organization's capacity to participate in and benefit from a technical exchange for integrating the PEPFAR gender strategic areas.

Criteria	Yes	Not Yet	No/Do Not Know	Comments
<b>Organizational Profile</b>				
1. Organization legally registered in country				
2. Organization of sufficient size and appropriate location to benefit from technical exchange in a cost-effective way				
3. Well-established, stable governance structure and management systems in place (including financial and administrative management systems)				
4. Financially stable over the past year				
5. Demonstrated commitment to high-quality, inclusive HIV prevention, care, and treatment				

Criteria	Yes	Not Yet	No/Do Not Know	Comments
<b>Technical Assistance Needs</b>				
1. Organization able to clearly articulate its technical assistance needs and priorities in relation to the PEPFAR gender strategic areas and why they are important to achieving organizational and project goals				
2. Identified technical assistance needs are relevant to the PEPFAR gender strategic areas				
3. Identified technical assistance goals are attainable within the available time frame				
4. Identified technical assistance needs can contribute to measurable improvement in achieving gains in the PEPFAR gender strategic areas				
5. Desired technical assistance activities are within the scope and range of available budget				
<b>Readiness to engage in technical assistance exchange</b>				
1. Demonstrates good understanding of the requirements for participating in a S2S technical assistance exchange				
2. Has strong support for the technical assistance exchange from senior management and leadership				
3. Key staff available and motivated to participate in technical assistance exchange				
4. Financial, infrastructure, and other resources (e.g., communication systems, internet connectivity, training facilities, transportation, etc.) available to support technical assistance exchange				
5. Administrative and management systems in place to support the technical				



Criteria	Yes	Not Yet	No/Do Not Know	Comments
assistance exchange				
6. Reliable Point of Contact identified and committed to process				
<b>Ability to use and extend the long-term benefits and contribute to the broader gender equality landscape</b>				
1. Demonstrated skills in monitoring and evaluation for organizational learning and adapting				
2. Explicit intention and plans to use technical assistance benefits to support integration of PEPFAR gender strategic areas within their organization and projects/activities				
3. Prior experience in partnership building, networking, advocacy, and policy reform to support greater integration of PEPFAR gender strategic areas at local, regional, national, or international levels				
<b>Other considerations</b>				
1. Travel to capital city and field locations is readily accessible for national and international travelers				
2. Security situation in country stable and safe for national and international travelers				
3. Demonstrated ability to work across cultures and languages and availability of local translators as needed				
4. Other considerations (please specify):				

## Overall Assessment of Suitability:

1. How would you rate the overall suitability of the organization to participate in a technical exchange as a technical assistance recipient? (check one)
  - High suitability—would definitely consider engaging in technical exchange
  - Moderate suitability—would consider engaging in technical exchange with recommended areas for strengthening
  - Questionable suitability—would not consider engaging in technical exchange at this time
  - Low suitability—would not consider engaging in technical exchange
2. What recommendations do you have for the organization to enable it to position itself better to participate in and benefit from a technical exchange for integrating the PEPFAR gender strategic areas?

# TOOL 3: DRAFT STATEMENT OF WORK AND STATEMENT OF WORK TEMPLATE

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## TITLE: South-to-South Technical Assistance Exchange on PEPFAR Gender Strategies

### PURPOSE

The purpose of the South-to-South (S2S) technical assistance exchange is to provide high-quality technical assistance and capacity building for PEPFAR implementing partners to integrate the PEPFAR gender strategic areas into their HIV program activities with the goal of improving HIV outcomes by addressing harmful gender norms and inequalities that hinder full realization of HIV prevention, care, and treatment.

### 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 (GBV) 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.<sup>2,3</sup> These key strategies, along with systematic efforts to mainstream gender across all program areas, are essential components to achieving program goals in prevention, treatment, and care. USAID is interested in helping implementing partners address the PEPFAR gender strategies by supporting and facilitating a S2S technical assistance exchange for partners requesting such assistance.

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<sup>2</sup> Lantos, Tom, and Henry J. Hyde. United States Global Leadership Against HIV/AIDS, Tuberculosis, and Malaria Reauthorization Act of 2008 (P.L. 110-293).

<sup>3</sup> These areas have since been updated as follows: 1. Provide gender-equitable HIV prevention, care, treatment, and support, 2. Implement gender-based violence (GBV) prevention services and provide services for post-GBV care, 3. Implement activities to change harmful gender norms and promote positive gender norms, 4. Promote gender-related policies and laws that increase legal protection, 5. Increase gender-equitable access to income and productive resources, including education.

## **GOAL AND OBJECTIVES**

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

Objectives of the project are to:

1. Increase the knowledge base and skills of the implementing partner in methods for integrating gender strategies in HIV programs
2. Enhance the quality and effectiveness of gender integration strategies
3. Support networking and relationship building to sustain the momentum for integrating gender strategies within HIV programming.

## **PERIOD OF PERFORMANCE**

The period of performance is \_\_\_\_\_.

## **PROGRAM TASKS/APPROACHES**

The technical assistance provider is expected to:

1. Conduct an initial collaborative assessment of the organizational capacity of the technical assistance recipient to clarify the organization's technical assistance needs and ability to absorb this assistance.
2. In collaboration with the technical assistance 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 technical assistance recipient to develop a workplan for achieving the goals stated in the MOU within the project's period of performance. When developing the workplan, the technical assistance provider should draw on its own expertise to use innovative approaches for delivering technical assistance that are most effective for meeting the needs of the recipient, and that are adaptable to the recipient's context and culture. 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, and to contribute to learning about the most effective way to provide technical assistance 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 technical assistance.
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 technical assistance project.

## **ANTICIPATED RESULTS**

1. Increased knowledge, skills, and capacity in the technical assistance recipient for integrating gender strategies into HIV work
2. Increased commitment on the part of the implementing partner to integrating gender strategies
3. Support for and strengthening of collaborative relationships and networking for integrating gender strategies within HIV work.

## **DELIVERABLES AND/OR PERFORMANCE MEASURES**

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

## **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.

## **TYPE OF CONTRACT/PAYMENT SCHEDULE**

# Statement of Work

(Template)

**TITLE OF PROJECT:**

**PURPOSE**

**BACKGROUND**

**GOAL AND OBJECTIVES**

**PERIOD OF PERFORMANCE**

**PROGRAM TASKS/APPROACHES**

**ANTICIPATED RESULTS**

**DELIVERABLES AND/OR PERFORMANCE MEASURE**

**KEY PERSONNEL/ROLES AND RESPONSIBILITIES**

**TYPE OF CONTRACT/PAYMENT SCHEDULE**

# TOOL 4: LIST OF POTENTIAL TECHNICAL ASSISTANCE PROVIDERS

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## **Potential Providers of South-to-South Technical Assistance Exchanges to Address Gender Inequity in HIV Programming**

The following list includes well-established organizations that could provide technical assistance to PEPFAR implementing partners to integrate and advance the PEPFAR gender strategic areas into their interventions. This list is based on research and staff knowledge of organizations in Africa, Asia, Eastern Europe, and Latin America and the Caribbean.

The criteria for including an organization were that the organization worked in the field of HIV; had programs promoting at least one PEPFAR gender strategic area in descriptions of its work (in informational materials and on its website); and agreed to be contacted. Each organization's description and contact information has been vetted as of the publication date. Organizations that act as hubs for networks and information exchange are included because they can widen access to regional organizations.

The list is not comprehensive and does not preclude use of other technical assistance providers by PEPFAR country teams. Table 1 on the following page shows the organizations by PEPFAR gender strategic area and region. A detailed list follows, organized by regions and including descriptions and contacts.

**Table 1. Organizational Capacity by PEPFAR Gender Strategic Area**

PEPFAR Gender Strategic Area	Region		
	Africa	Eastern Europe and Asia	Latin America/Caribbean
Provide gender-equitable HIV prevention, care, treatment, and support	<p>AIDS Legal Network</p> <p>Cameroon Baptist Convention Health Services</p> <p>Faith to Action Network</p> <p>Girls' Power Initiative</p> <p>Kenya AIDS NGOs Consortium</p> <p>People Opposed to Women Abuse</p> <p>Positive Action for Treatment Access</p> <p>The AIDS Support Organisation</p> <p>Uganda Protestant Medical Bureau</p> <p>Women and AIDS Support Network</p> <p>Women's Health Association of Ethiopia</p>	<p>Alliance Regional Technical Support Hub for Eastern Europe and Central Asia</p> <p>Alliance Regional Technical Support Hub for South Asia</p> <p>HIV/AIDS Coordinating Committee</p> <p>India HIV/AIDS Alliance</p> <p>Karnataka Health Promotion Trust</p> <p>Khmer HIV/AIDS NGO Alliance</p> <p>Lembaga Kesehatan Nahdlatul Ulama</p> <p>The Institute of Health Management, Pachod</p>	<p>Centro Regional de Asistencia Técnica/Vía Libre</p> <p>Instituto Promundo</p>



PEPFAR Strategy	Region		
	Africa	Eastern Europe and Asia	Latin America/Caribbean
Implement gender-based violence (GBV) prevention services and provide services for post-GBV care	<p>AIDS Legal Network</p> <p>Cameroon Baptist Convention Health Services</p> <p>Faith to Action Network</p> <p>Kenya AIDS NGOs Consortium</p> <p>People Opposed to Women Abuse</p> <p>Raising Voices</p> <p>Sonke Gender Justice Network</p> <p>Tanzania Council for Social Development</p> <p>Uganda Protestant Medical Bureau</p> <p>Women and AIDS Support Network</p> <p>Women's Health Association of Ethiopia</p>	<p>Alliance Regional Technical Support Hub for Eastern Europe and Central Asia</p> <p>Alliance Regional Technical Support Hub for South Asia</p> <p>HIV/AIDS Coordinating Committee</p> <p>India HIV/AIDS Alliance</p> <p>Karnataka Health Promotion Trust</p> <p>Khmer HIV/AIDS NGO Alliance</p> <p>Lembaga Kesehatan Nahdlatul Ulama</p> <p>The Institute of Health Management, Pachod</p>	<p>Centro Regional de Asistencia Técnica/Vía Libre</p> <p>Instituto Promundo</p>
Implement activities to change harmful gender norms and promote positive gender norms	<p>Cameroon Baptist Convention Health Services</p> <p>Faith to Action Network</p> <p>Raising Voices</p> <p>Sonke Gender Justice</p> <p>Tanzania Council for Social Development</p> <p>Uganda Protestant Medical Bureau</p>	<p>Alliance Regional Technical Support Hub for Eastern Europe and Central Asia</p> <p>Alliance Regional Technical Support Hub for South Asia</p> <p>India HIV/AIDS Alliance</p> <p>Karnataka Health Promotion Trust</p> <p>Khmer HIV/AIDS NGO Alliance (KHANA)</p>	<p>Centro Regional de Asistencia Técnica/Vía Libre</p> <p>Instituto Promundo</p>
Promote gender-	AIDS Legal Network	Alliance Regional	

PEPFAR Strategy	Region		
	Africa	Eastern Europe and Asia	Latin America/Caribbean
related policies and laws that increase legal protection	Girls' Power Initiative Kenya AIDS NGOs Consortium Cameroon Baptist Convention Health Services Faith to Action Network	Technical Support Hub for Eastern Europe and Central Asia Alliance Regional Technical Support Hub for South Asia India HIV/AIDS Alliance Karnataka Health Promotion Trust Lembaga Kesehatan Nahdlatul Ulama The Institute of Health Management, Pachod	
Increase gender-equitable access to income and productive resources, including education	Girls' Power Initiative Women's Health Association of Ethiopia Cameroon Baptist Convention Health Services	Aisyiyah India HIV/AIDS Alliance Karnataka Health Promotion Trust Khmer HIV/AIDS NGO Alliance (Khana) The Institute of Health Management, Pachod	

## AFRICA

The **AIDS Legal Network** (<http://www.aln.org.za/>) is a non-governmental human rights organization founded in 1994 and committed to the promotion, protection, and realization of the fundamental rights and freedoms of people living with, and affected by, HIV and AIDS. The organization addresses the legal and ethical challenges presented by HIV and AIDS by providing human rights education and legal literacy training, responding to rights violations and abuses, and advocating for law reform both nationally and internationally. Recognizing women's disproportionate risks and vulnerabilities to HIV exposure, transmission, and related rights abuses, AIDS Legal Network activities focus on women's and human rights in the context of and in response to HIV. Main program areas are awareness-raising and capacity building, legal literacy and training, social policy assessment and research, advocacy, lobbying and networking, and development, production, and dissemination of publications.

The AIDS Legal Network provides technical assistance and support in the form of legal literacy training and capacity building related to human rights and gender-based violence in the context of and in response to violence and HIV. Technical assistance includes facilitating an enabling, supportive, and gender-sensitive environment for more effective rights-based responses to HIV, in general, and responses to women, violence, and HIV in particular. The objective is to achieve an environment which people, and particularly women in all their diversity,<sup>4</sup> are equally able to claim and exercise their rights and agency, and to access and benefit from available HIV prevention, testing, treatment, care, and support services. The AIDS Legal Network utilizes methodologies and approaches that are community-driven and -owned.

**Specialties:** legal literacy training, social policy assessment and research, advocacy, lobbying and networking and capacity building related to human-rights and gender-based violence.

Contact:

Johanna Kehler

Executive Director

Email: [jkeehler@icon.co.za](mailto:jkeehler@icon.co.za)

Tel: +27 21 447 8435

Address: Waverley Business Park, Dane Street, Mowbray, Cape Town 7700, South Africa

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<sup>4</sup> The term "women in all their diversity" refers to *all* women with a specific focus on women living with HIV, young women, women who do sex work, women in same-sex relationships, transgender women, and women who use drugs.

### **The Cameroon Baptist Convention Health Services**

(<http://www.cbchealthservices.org/index.html>) is a nonprofit, faith-based health care organization, established over 60 years ago in Cameroon. It has an extensive facility network made up of 6 hospitals, 30 integrated health centers, and 52 primary health centers in remote, underserved communities. Program focus areas address gender equity, violence and coercion, male norms and behavior, women's legal protection, and women's economic empowerment. The organization carries out its mission by integrating gender within HIV service delivery, psychosocial support, community education, and targeted social services for survivors of gender-based violence. The Cameroon Baptist Convention Health Services is a recognized technical assistance provider in a variety of HIV programs under PEPFAR. It has provided technical assistance to over 12 countries in West, Central, North, and East Africa. The organization works in close partnership with the government, implementing partners, and donor agencies such as USAID and the Centers for Disease Control and Prevention.

**Specialties:** gender mainstreaming, technical assistance, capacity building, psychosocial support.

Contact:

Professor Tih Pius

Executive Director  
Cameroon Baptist Convention Health Services  
PO Box 1 Bamenda  
North West Region  
Cameroon

Tel: +237 677 96 46 83

Email: [piustih@cbchealthservices.org](mailto:piustih@cbchealthservices.org)

### **Faith to Action Network** (<http://fanwa.org/>)

Combines innovative, evidence-backed and community-based programming with national, regional, and international advocacy to address gender equity, violence and coercion, male norms and behavior, and women's legal protection at all levels. Through the work of its "traveling caravans," the Network is on the forefront of generating and disseminating knowledge on faith-based approaches to sexual and reproductive health and women's rights. It has provided technical assistance and training to faith leaders in the development and use of tools for integrating health issues into religious messaging in Kenya, Uganda, and Ghana. This model has been successfully implemented in both Muslim and Christian communities. The Network is a global inter-faith network of faith-based organizations committed to improving family health and well-being.

**Specialties:** advocacy, community awareness and mobilization, capacity building.

Contact:

Peter Munene

International Coordinator

Hatheru Court (Lavington), Hatheru Road, Off Gitanga Road, P.O. Box 2438–00202 Nairobi, Kenya

Tel: +254 20 273 1398

Fax: N/A

Email: [peter.munene@dsw.org](mailto:peter.munene@dsw.org)

**Girls' Power Initiative** ([www.gpinigeria.org](http://www.gpinigeria.org)) works with girls aged 10 to 18 years on rights-based, gender-sensitive approaches to sexuality and reproductive health, helping to ensure youth development and prevent HIV transmission. Girls' Power Initiative also works to reduce stigma and discrimination and to improve prevention, treatment, and care and support services for HIV at local, state, and national levels. The Initiative works in four states in Nigeria, and the founders, Grace Osakue and Bene Madunagu, have provided technical assistance to organizations globally.

**Specialties:** curriculum development, school outreach, peer education, edutainment, stakeholder forums, community intervention/social work, counseling services, economic skills training, gender sensitivity, and sexuality education trainings.

Contact:

Headquarters

Anyamurua Residential Estate

Atimbo Road

Calabar, Nigeria

Telephone: (234) 80 3357895

Fax: (234) 87 236298

Email: [gpicalabar@gpinigeria.org](mailto:gpicalabar@gpinigeria.org); [gpi\\_hqcal@yahoo.co.uk](mailto:gpi_hqcal@yahoo.co.uk)

**Kenya AIDS NGOs Consortium** (<http://www.kanco.org/>) is a network of over 1,200 NGOs, community-based organizations (CBOs), faith-based organizations, private sector actors, and research and learning institutions working in HIV and more broadly, public health. The Consortium is a leader for sensitizing, mobilizing, and promoting collaboration among civil society organizations working to mitigate HIV, AIDS, tuberculosis, and other public health concerns. It implements a range of interventions working closely with key populations affected by the HIV epidemic, including men who have sex with men, injecting drug users, sex workers, and people living with HIV. The Consortium also implements broader community awareness and policy advocacy activities around gender and GBV.

**Specialties:** GBV screening, referrals, psychosocial support, treatment and care, provision of post-exposure prophylaxis and health worker sensitization, targeted information, education, and communication.

Contact:

Peter Kamau, Program Manager

PO Box 69866

Nairobi, Kenya

Tel: +254 20 2717664

Email: [pkamau@kanco.org](mailto:pkamau@kanco.org)

**People Opposing Women Abuse** (<http://www.powa.co.za/>) is a South African women's rights organization established in 1979 in response to excessive levels of violence against women. The organization provides direct legal and psychosocial services and support to women survivors of violence and their children. Through its sector strengthening and capacity building programs, the organization aims to increase women's access to services and justice. Currently, People Opposing Women Abuse is engaging with emerging community-based organizations that work to address violence against women in five South African provinces: Limpopo, North West, Northern Cape, Mpumalanga, and Gauteng. In the area of HIV, People Opposing Women Abuse is the lead organization spearheading the eight-nation Raising Her Voice Campaign, working to empower women to hold governments accountable to commitments on GBV and HIV. The organization also disseminates information and provides training to stimulate debate, discussion, activity, and learning on violence against women and its intersections with poverty and HIV.

**Specialties:** shelters, counseling, and legal advice, advocacy, outreach, training and development, and knowledge products.

Contact:

Head Office

P.O. Box 93416

Yeoville 2143

Johannesburg

South Africa

Telephone: 011 642 4345/6

Fax: 011 484 3195

Email: [newoh@powa.co.za](mailto:newoh@powa.co.za)

**Positive Action for Treatment Access** ([www.pata-nigeria.com](http://www.pata-nigeria.com)) is an NGO working to ensure equity in health services and information. This NGO promotes and advocates for access to non-discriminatory health care responses; partners 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. Positive Action for Treatment Access is has a mentoring, leadership, and advocacy capacity-building program for women living with HIV across Nigeria. Through this program, the group trains and mentors women living with HIV to carry out concrete roles in HIV programming; delivers technical and educational support to the women as a strategy for reducing stigma and increasing HIV treatment literacy; and coordinates a revolving loan scheme that disburses small loans to support the small-scale businesses of women vulnerable to HIV.

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

Contact:

Morolake Odetoyinbo, Executive Director  
1st Floor  
Holy Trinity Hospital Plaza  
Adesina Street, Off Obafemi Awolowo Way  
Ikeja, Lagos  
Nigeria  
Telephone: +234 (0) 80 98 728 264  
Email: [info@pata-nigeria.com](mailto:info@pata-nigeria.com)

**Raising Voices** ([www.raisingvoices.org](http://www.raisingvoices.org)) works to prevent violence against women and children by reducing social acceptance of such violence. It implements advocacy strategies, research and dissemination, and networking to change attitudes and behaviors that perpetuate violence against women.

Their SASA! (Swahili for *now!*) approach for preventing violence against women with HIV offers a practical process for organizations and community activists. It is designed to strengthen activists' skills, and invests in helping them to become the drivers of change in their own communities.

**Specialties:** local activism (interpersonal level), institutional activism (community level), and multimedia activism (societal level); generating and disseminating new evidence and knowledge; and policy reform.

Contact:

Lori Michau

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**Sonke Gender Justice** ([www.genderjustice.org.za](http://www.genderjustice.org.za)) works across Africa to strengthen government, civil society, and citizen capacity to promote gender equality, prevent domestic and sexual violence, and reduce the spread and impact of HIV and AIDS. Their flagship program, the *One Man Can Campaign*, 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 technical assistance to south-based organizations in Africa as well as other regions.

**Specialties:** partnering with government to promote policy development and effective implementation; advocacy, activism and community mobilization; networking and coalition work; capacity building and training with partner organizations; communication strategies for social change; community education and individual skills building; research; and monitoring and evaluation.

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**Tanzania Council for Social Development** (website under development) is an umbrella organization that supports other NGOs and CBOs through training, networking, policy analysis, and advocacy. The Council has been working since the early 1990s to increase access to HIV services for young people, women and girls and people living with HIV.

The Tanzania Council for Social Development works to address GBV through direct service delivery and policy advocacy at local and national levels. The Council facilitates community dialogues in areas affected by GBV to help communities identify GBV and its causes, those most affected by GBV, and the link between gender equality, GBV, and HIV. The organization convenes multi-stakeholder GBV awareness-raising trainings and seminars, and supports stakeholders to provide legal and counseling services to those affected by GBV.

**Specialties:** psychosocial and legal support, advocacy, community sensitization and education.

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**The AIDS Support Organisation** ([www.tasouganda.org](http://www.tasouganda.org)) provides comprehensive HIV services ranging from HIV prevention to care and treatment. Their model of care addresses the needs of all 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. The organization has helped to strengthen the national response to HIV by providing capacity building to over 50 civil society organization in Uganda through sub-granting, organizational development, training, mentoring and coaching, and infrastructure building. It has also contributed to the establishment of other HIV and AIDS service organizations including the AIDS Information Centre, Uganda Network of AIDS Service Organization, Positive Men's Union, and the National Community for Women Living with HIV/AIDS in Uganda.

**Specialties:** counseling, clinical- and home-based medical care, advocacy and networking, HIV prevention with positives programming, training, mentoring, technical support for health service providers, and organizational strengthening to promote best practices and a comprehensive model of care.

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**Uganda Protestant Medical Bureau** (<http://upmb.co.ug/>) addresses gender equity, violence and coercion, and male norms and behavior. This is supported through integrating gender within HIV service delivery, psychosocial support, and community education. The Bureau has developed community tools to increase male involvement in HIV services and address gender-based violence in communities. The Bureau was founded in 1957 to improve the health status of people living in Uganda, especially the marginalized and the poorest of the poor located in the rural underserved areas.

**Specialties:** gender mainstreaming psycho social support, community mobilization, information dissemination.

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**Women and AIDS Support Network** (<https://wasnzimbabwe.wordpress.com/>) addresses women's HIV-related needs with HIV through advocacy, support, and networking. The Network 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. It works through its gender-specific models to build the capacity of other organizations and institutions to address gender inequality in their policies and programs. The Network's gender-specific HIV and AIDS interventions model has gained widespread recognition, and has been delivered to 90 organizations in Zimbabwe, 19 organizations in Ethiopia, and one organization in Ghana.

**Specialties:** advocacy, capacity building, information dissemination, gender mainstreaming, and psychosocial support.

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**The Women's Health Association Ethiopia** (<http://www.womenhealthethiopia.org/>) was formally established in December 2010 by dedicated women professionals with the mandate to economically and socially empower women to improve the lives of women in Ethiopia. It is a national association with local units in all nine regions in Ethiopia. Its organizational model is based on using local resource women for continuous engagement, and obtaining continuous engagement and contact with local resource people and local tools. The Association offers a continuum of services that includes activities to prevent violence against women and promote women's economic independence. Areas of technical expertise include women's health, sexual and reproductive health, HIV, intimate partner violence, and women's access to income and productive resources.

The Association empowers women to play a leading role in their own lives, family, and community health. The organization promotes women's access to adequate healthcare and addresses the gendered impact of HIV, and implements women-centered programs for marginalized women in both urban and rural areas. The Association also implements innovative localized community health education, nutrition, human rights and sustainable livelihoods programs focused on women. These programs are implemented over a 5-year cycle. Awareness-

raising remains the cornerstone of the organization's work, based on a belief in individual, family, and community transformation.

**Specialties:** direct service provision, capacity building and training for local authorities, local organizations, and government departments.

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## EASTERN EUROPE AND ASIA

**Aisyiyah** (<http://aisyiyah.or.id/>) is a prominent Islamic women's organization in Indonesia dedicated to female empowerment and charitable activity within the framework of an Islamic society. It works at both national and community levels to increase women's access to income and productive resources. The organization focuses on capacity building for women in business development and management, and facilitates micro-lending through bank and credit institutions to support income-generating projects. 'Aisyiyah's work on women's economic empowerment is integrated in all its health programming, with a strong focus on child and maternal health, HIV, and family planning.

**Specialties:** women's economic empowerment, capacity building, and training.

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### **Alliance Regional Technical Support Hub for Eastern Europe and Central Asia**

([www.tshub.org](http://www.tshub.org)) is hosted by the International HIV/AIDS Alliance in Ukraine is part of a network of the regional technical support hubs of the International HIV/AIDS Alliance. The Eastern Europe and Central Asia Hub has experience in providing technical support on innovative outreach approaches targeting women at risk, including mitigation against GBV and expanding women's rights. The Hub develops packages of services for key populations that incorporate gender mainstreaming and women's access to health services, and build dialogue between civil

society and government to ensure equal access to services and engagement of key populations. The Eastern Europe and Central Asia Hub has also supported the development of the PEPFAR Gender Strategy for Central Asia.

**Specialties:** community systems strengthening, resolving human rights barriers to accessing health services, gender equality, meaningful engagement of key populations, GBV, advocacy, strategic planning, development and management of comprehensive HIV prevention programs for key populations, monitoring and evaluation.

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**Alliance Regional Technical Support Hub (South Asia)** is part of the global technical support network of the International HIV/AIDS Alliance and builds capacity of civil society organizations, government and the private sector to respond more effectively and efficiently to HIV and related challenges in the Asia-Pacific region.

The South Asia Hub's technical expertise lies in organizational development, program management, monitoring and evaluation, research, and advocacy. The Hub is experienced in gender equality and human rights, and has developed a practitioners' guide on working with women who inject drugs and the sexual partners of male drug users across Asia for the United Nations Development Program; reviewed data from the World Health Organization on men who have sex with men and transgender populations in South and South-East Asia; and developed a training curriculum to improve the sexual and reproductive health of women living with HIV as part of Alliance India's European Union-funded Koshish program.

**Specialties:** community systems strengthening, engagement and leadership development for key populations, violence and crisis response, community-based care & support for people living with HIV, sexual and reproductive health and HIV integration, male involvement, human rights, and gender equity.

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**HIV/AIDS Coordinating Committee** ([www.haccambodia.org/index.php](http://www.haccambodia.org/index.php)) is a network of 124 local and international civil society organizations working on HIV and related social health issues in Cambodia. It was established in 1993 as a forum for enhancing information sharing and coordination, advocacy, and awareness-raising, with the goal of empowering its members, partners, and affected and vulnerable populations in strengthening the national response to HIV. Its work focuses on advocacy and representation on behalf of HIV civil society organizations; coordination, communications and networking to support an effective civil society response to HIV; capacity building to help civil society organizations address gaps, unmet needs, and discrimination against people living with HIV and AIDS; and organizational development to strengthen the leadership of its member organizations. One of the organization's core values is to protect, promote, and respect the rights of all people living with HIV and AIDS, and to prevent discrimination on the basis of gender, HIV status, race, or religious affiliation.

**Specialties:** coordination, advocacy, HIV awareness campaigns, research, capacity building, and providing financial and technical support to civil society.

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**India HIV/AIDS Alliance** (<http://www.allianceindia.org/>) was founded in 1999 as an NGO that works closely with the government of India, civil society, and CBOs. Alliance India strengthens the delivery of effective, innovative, rights-based, and community-based interventions to

improve the health of vulnerable communities and sustain India's HIV response. The organization implements a range of interventions working closely with key populations affected by the epidemic: men who have sex with men, transgender persons/hijras, injecting drug users, sex workers, and people living with HIV.

Alliance India has developed and implementing gender-sensitive, participatory, and rights-based programs to strengthen India's HIV response by working closely with the government to expand access to essential services, develop curricula and toolkits, build CBO capacity and leadership, train and provide technical support to communities, implementing partners, and other stakeholders, and work with marginalized communities, with particular focus on the needs of women, girls, and transgender persons in HIV and sexual and reproductive health.

**Specialties:** coordination, advocacy, sensitization to increase awareness and reduce stigma and discrimination.

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**Karnataka Health Promotion Trust** (<http://khpt.org/>), formed in 2003, envisions "empowered communities, working collectively to improve their health and well-being and assert their rights and dignity." The Karnataka Health Promotion Trust is a nationally recognized organization of excellence in HIV programming using a "program science" approach, gender-focused capacity initiatives with participatory learning, and research that translates into policy and practice. The Karnataka Health Promotion Trust has extensive experience implementing projects that focus on reducing gender inequities in HIV prevention, care and treatment; improving gender norms among female sex workers and their children; and increasing awareness of rights and legal protection in India. The Karnataka Health Promotion Trust has shared much of this experience with other states in India and countries in Southeast Asia and Africa.

As an organization, Karnataka Health Promotion Trust has an active Gender Integration Committee against Sexual Harassment and a Child Protection Policy. The Karnataka Health Promotion Trust promotes the development of similar committees and policies in community-

based organizations of female sex workers and people living with HIV. The Karnataka Health Promotion Trust works closely with adolescents, children and their families, local communities, and governments to enhance retention of girls in secondary schools to delay sexual debut and entry into sex work. The Karnataka Health Promotion Trust also works closely with the police and judicial academies to reduce violence among female sex workers and implements an innovative program with intimate partners of female sex workers to reduce violence. The Karnataka Health Promotion Trust has extensive experience in using exposure visits, experiential learning, and international expertise in e-forums to transfer its knowledge to countries in Africa and Asia. Beyond HIV, the Karnataka Health Promotion Trust translates its HIV learning into tuberculosis, and maternal, neonatal and child health programs in India, and is well-established as a knowledge platform for the University of Manitoba's Centre for Global Public Health.

**Specialties:** reduction of GBV against female sex workers, perpetrated by intimate partners and others; reduction in GBV among adolescent girls most vulnerable to HIV; gender equitable access to HIV prevention, care and treatment; awareness-raising on gender-related policies and laws; work with police and judiciary systems; training, evaluation and policy formulation; and organizing "exposure visits" to programs in India.

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**Khmer HIV/AIDS NGO Alliance** ([www.khana.org.kh](http://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, focused prevention programs for key populations, and health system strengthening to increase collaboration and coordination, improve governance and accountability, and achieve more effective leadership with evidence-based decision-making. One of the organization's recent studies is an assessment of the gaps and opportunities in gender integration within its Harm Reduction program in Cambodia. The study helped to build the capacity of the Alliance and its implementing partners to advocate for greater gender integration in harm reduction programs in Cambodia.

**Specialties:** research, capacity building, community response, and policy dialogue and advocacy.



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**Lembaga Kesehatan Nahdlatul Ulama** (<http://cepat-lknu.org>) addresses gender equity, violence and coercion, and women's legal protection. The organization participates in creating legislature and policy on violence against women across many health areas from national to community levels. Through many advocacy efforts, the organization has successfully advocated for changes in several laws protecting women's rights in Indonesia. It also builds the advocacy capacity of women's groups and raises community awareness of women's rights. The organization was formed in 1998 as the health institution under the umbrella organization known as Nahdlatul Ulama, the largest Islamic organization in Indonesia and the world.

**Specialties:** women's legal protection, advocacy, capacity building, information dissemination.

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**The Institute of Health Management, Pachod** ([www.ihmp.org/adolescent\\_health.html](http://www.ihmp.org/adolescent_health.html)) was established in 1986 in the Indian state of Maharashtra as a regional resource and training center for NGOs and national and international students in the management and implementation of community health programs. One of its special areas of expertise is in adolescent and women's health. For example, as part of a broader program on adolescent reproductive health, the Institute implemented a Life Skills Program to improve the health and social status of adolescent girls. The program was designed to increase practical skills in health and nutrition, HIV, gender roles, legal literacy, and team-building. The results of the program were presented at a State-level workshop on adolescent reproductive and sexual health, and contributed to the development of additional research and policies on adolescent health and related social issues, such as early marriage and access to contraceptives.

**Specialties:** research, policy advocacy, training, and community health programs.

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## LATIN AMERICA

**Centro Regional de Asistencia Técnica/Vía Libre** ([www.vialibre.org.pe/](http://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. The organization has strong experience in linking transformative gender approaches with HIV prevention, HIV services and human rights. It provided technical support in the development and piloting of the UNAIDS gender assessment tool for HIV in Bolivia; conducted regional research on human rights violations with transgender activists in Central America; and worked with key populations, such as transgender women, commercial sex workers, and men who have sex with men, in 17 countries in the region. Vía Libre has also worked closely with the Global Fund to support Country Coordinating Mechanisms on their eligibility and performance assessments, focusing on gender equality and engagement of key populations.

**Specialties:** capacity building, community outreach, gender mainstreaming and advocacy.

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Coordinador

Centro Regional de Asistencia Técnica para Latinoamérica y el Caribe Hispanohablante

VÍA LIBRE - INTERNATIONAL HIV/AIDS ALLIANCE

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**Instituto Promundo** ([www.promundo.org.br](http://www.promundo.org.br)) is a global leader in promoting gender justice and positive health outcomes, and preventing violence by engaging men and boys in partnership with women and girls. Promundo's offices in Brazil collaborate on research, programs, and advocacy. The organization creates safe spaces for men and women. In some settings (post-conflict and high-violence settings), these spaces enable users to heal from trauma; other spaces allow youth to question harmful gender norms and improve their sexual and reproductive health; still others enable men to discuss the benefits of engaged fatherhood and shared decision-making, and the costs of violence and exploitation. Since its founding in 1997, Promundo has provided technical assistance in over 30 countries.

***Specialties:*** research, advocacy, educational workshops, and community campaigns.

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# TOOL 5: CHECKLIST OF CRITERIA FOR TECHNICAL ASSISTANCE PROVIDER SELECTION

Name of Technical Assistance Provider Organization: _____	Yes	No/Do Not Know	Comments
<b>Technical Qualifications</b>			
Demonstrated knowledge and skills in HIV programming			
Demonstrated knowledge and skills in integrating gender strategies in HIV programming			
Past performance and experience in providing technical assistance and capacity development services			
Past performance and experience in working with NGOs and PEPFAR implementing partners			
<b>Implementation Capacity</b>			
Understanding of the requirements of the technical assistance			
Experienced personnel available for technical assistance during project period			
Motivation and leadership qualities necessary to successfully complete the technical assistance			
Financial and administrative systems in place to manage technical assistance grant and reporting requirements			
Good track record in successful completion of similar technical assistance projects			
<b>Other Considerations</b>			
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 technical assistance exchanges over an agreed-on period of time			



## TOOL 6: TOOLS FOR TECHNICAL EXCHANGE BY TYPE AND ORGANIZATION

Type of Tool	Name/Source	Description/Comments
Overviews on tools	Twinning Center Partnership Toolkit <a href="http://www.twinningagainstaids.org/twinningtoolkit/developing.html">http://www.twinningagainstaids.org/twinningtoolkit/developing.html</a>	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 Twinning Partnership Toolkit <a href="http://www.twinningagainstaids.org/twinningtoolkit/">http://www.twinningagainstaids.org/twinningtoolkit/</a>	Same as for Twinning Center.
	AIDS Alliance Capacity Analysis Guide <a href="http://www.aidsalliance.org/assets/000/000/661/114-CBO-capacity-analysis_original.pdf?1406293445">http://www.aidsalliance.org/assets/000/000/661/114-CBO-capacity-analysis_original.pdf?1406293445</a>	Guides for capacity analysis in CBOs, NGOs, networks, and rapid assessment guides.
	Raising Voices SASA! Partnership Application Forms <a href="http://raisingvoices.org/sasa/">http://raisingvoices.org/sasa/</a>	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! <a href="http://raisingvoices.org/sasa/">http://raisingvoices.org/sasa/</a>	The SASA! Regional Partnership is a three-year technical assistance 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.

Type of Tool	Name/Source	Description/Comments
		<p>Competency assessment tools are available.</p> <p>Raising Voices provides competency-based technical assistance in four areas (community mobilization, entering a community, local activism, and training/mentoring related to prevention of violence against women). Raising Voices is not a donor agency, and the SASA! regional partnership is technical assistance-oriented.</p>
	<p>Twinning Center—Initiating a Partnership  <a href="http://www.twinningagainstaids.org/twinningtoolkit/initiating.html">http://www.twinningagainstaids.org/twinningtoolkit/initiating.html</a></p>	<p>A step-by-step process for finding a partner, developing an MOU, funding, etc. Includes links to partner databases and sample MOUs.</p>
Assessment	<p>AIDS Alliance—CBO Capacity Analysis Toolkit  <a href="http://www.aidsalliance.org/resources/328-cbo-capacity-analysis-toolkit">http://www.aidsalliance.org/resources/328-cbo-capacity-analysis-toolkit</a></p>	<p>The toolkit is designed to facilitate group discussions with CBOs to assess their organizational capacity, identify capacity building needs, plan technical support needed, and monitor and evaluate 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 technical assistance they could benefit from.</p> <p>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.</p>
	<p>AIDS Alliance NGO Capacity Analysis Toolkit  <a href="http://www.aidsalliance.org/resources/329-ngo-capacity-analysis-toolkit">http://www.aidsalliance.org/resources/329-ngo-capacity-analysis-toolkit</a></p>	<p>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.</p> <p>It includes tools for a one- to two-day workshop, interviews and questionnaires, indicator lists and rating sheets, and a document review checklist.</p>



Type of Tool	Name/Source	Description/Comments
	AIDS Alliance Network Capacity Analysis—Workshop Facilitation Guide <a href="http://www.aidsalliance.org/resources/331-network-capacity-analysis-workshop-facilitation-guide">http://www.aidsalliance.org/resources/331-network-capacity-analysis-workshop-facilitation-guide</a>	<p>The aim of this toolkit is to build the skills required by civil society networks to develop and strengthen their capacity. The tools 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 organization's status 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.</p> <p>A three-day workshop requires an internal or external facilitator.</p>
	AIDS Alliance Network Capacity Analysis—Rapid Assessment Guide <a href="http://www.aidsalliance.org/resources/330-network-capacity-analysis-toolkit-rapid-assessment-guide">http://www.aidsalliance.org/resources/330-network-capacity-analysis-toolkit-rapid-assessment-guide</a>	<p>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. The guide can also be used as a questionnaire for individuals or paired interviews.</p>
Assessment	AIDS Alliance Intermediary Organizations—Capacity Analysis <a href="http://www.aidsalliance.org/resources/332-intermediary-organisations-capacity-analysis">http://www.aidsalliance.org/resources/332-intermediary-organisations-capacity-analysis</a>	<p>Intermediaries are organizations that provide financial and/or technical support to grass-roots HIV organizations. They may be national or regional NGOs or networks. The toolkit provides detailed information on analyzing the capacities of these organizations, including:</p> <ol style="list-style-type: none"> <li>1. The capacity to identify and select effective and accountable NGOs/CBOs and support them financially using transparent and efficient sub-granting mechanisms.</li> <li>2. The capacity to provide effective and appropriate technical support on HIV to NGO/CBO partners.</li> <li>3. The capacity to positively influence national and local institutions that have an impact on the HIV epidemic and national responses to it.</li> </ol>

Type of Tool	Name/Source	Description/Comments
		<p>The capacity areas are broken down into "Technical support skills in HIV and organizational development," "Technical support approaches, attitudes, and effectiveness," and "Access to resources and knowledge."</p> <p>The tool 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.</p>
Assessment	<p>Twinning Center Partner Organizational Capacity Assessment Tool (2006) <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Assessment_Tool.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Assessment_Tool.pdf</a> Partner Organizational Capacity Assessment: Facilitator Workbook (2006) <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Facilitators_Guide.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Facilitators_Guide.pdf</a></p>	<p>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, using questions and rating scales. It covers background, organization profile, leadership and governance, finances, project design and management, networking and advocacy, and technical capacity.</p> <p>Worksheets for assessment focus group are available.</p>
Development of SOW	<p>SOW Writing Guide <a href="http://www.rfpsolutions.ca/files/SOW_Writing_Guide2.pdf">http://www.rfpsolutions.ca/files/SOW_Writing_Guide2.pdf</a> How to Write the Project SOW <a href="http://www.pmhut.com/how-to-write-the-project-statement-of-work-sow">http://www.pmhut.com/how-to-write-the-project-statement-of-work-sow</a></p>	

Type of Tool	Name/Source	Description/Comments
	Wikipedia—SOW <a href="http://en.wikipedia.org/wiki/Statement_of_work">http://en.wikipedia.org/wiki/Statement_of_work</a>	
	Twinning Center Trip SOW <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Scope_of_Work.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Scope_of_Work.pdf</a>	SOW for travel form (basic).
Contracting/MOU	Twinning Center Partnership MOU <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/MOU.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/MOU.pdf</a>	MOU for multiple partners and American International Health Alliance.
	Twinning Center Sample Contract <a href="http://www.icad-cisd.com/content/pdf/Twinning/Twinning_Sample_Contract.pdf">http://www.icad-cisd.com/content/pdf/Twinning/Twinning_Sample_Contract.pdf</a>	Partnership agreement for Twinning project—very complete.
	MOU Template <a href="http://www.ovw.usdoj.gov/docs/sample-mou.pdf">http://www.ovw.usdoj.gov/docs/sample-mou.pdf</a>  Partnership Development Tool <a href="http://www.nccmt.ca/registry/view/eng/134.html">http://www.nccmt.ca/registry/view/eng/134.html</a> <a href="http://www.ccghr.ca/resources/partnerships-and-networking/partnership-assessment-tool/">http://www.ccghr.ca/resources/partnerships-and-networking/partnership-assessment-tool/</a> <a href="http://www.pcrs.ca/uploads/7L/A/7L_AT_XdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf">http://www.pcrs.ca/uploads/7L/A/7L_AT_XdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf</a>	

Type of Tool	Name/Source	Description/Comments
	Sample Letters of Understanding <a href="http://www.qdros.com/forms/letterofunderstanding.pdf">http://www.qdros.com/forms/letterofunderstanding.pdf</a>	
Workplan development	Twinning Center Developing a Workplan <a href="http://www.twinningagainstaids.org/twinningtoolkit/developing.html">http://www.twinningagainstaids.org/twinningtoolkit/developing.html</a> Workplan Guidelines <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Guidelines.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Guidelines.pdf</a> Sample Workplan <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Workplan.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Workplan.pdf</a> Workplan Review Guide <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Review.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Workplan_Review.pdf</a>	<ol style="list-style-type: none"> <li>1. Includes organization capacity assessment tools (see previous discussion), workplan templates and guidelines, sample budget template.</li> <li>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.</li> <li>3. To be used by Twinning Center staff as a checklist for reviewing workplan drafts from partners.</li> </ol>
Implementation	Twinning Center Implementing the Program <a href="http://www.twinningagainstaids.org/twinningtoolkit/implementing.html">http://www.twinningagainstaids.org/twinningtoolkit/implementing.html</a> Twinning Center Budget Template <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Budget_Template.xls">http://www.twinningagainstaids.org/twinningtoolkit/forms/Budget_Template.xls</a>	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.  An Excel worksheet.
M&E	American International Health Alliance M&E Tools: Initial Partnership Assessment Form (Community-based Primary Health Care)	

Type of Tool	Name/Source	Description/Comments
	Partnership Workplan Template and Guidelines Annual Implementation Plan Template and Guidelines Quarterly Progress Report <a href="http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/">http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/</a> <a href="http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/templates.asp">http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/templates.asp</a> M&E Terminology <a href="http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/terminology.asp">http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/Tools/terminology.asp</a> Performance Indicator Reference Sheet <a href="http://www.eurasiahealth.org/toolkits/phc/resources/PHC%20Performance%20Indicator%20Reference%20Sheet.pdf">http://www.eurasiahealth.org/toolkits/phc/resources/PHC%20Performance%20Indicator%20Reference%20Sheet.pdf</a>	
	Twinning Center Program Monitoring <a href="http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html">http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html</a>	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 <a href="http://www.twinningagainstaids.org/twinningtoolkit/evaluation.html">http://www.twinningagainstaids.org/twinningtoolkit/evaluation.html</a>	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 American International Health Alliance <a href="#">M&amp;E Toolkit for New Partners</a> , American International Health Alliance <a href="#">Partnership Self-Assessment Survey</a> , and guidance on evaluation.

Type of Tool	Name/Source	Description/Comments
M&E	<p>Twinning Center American International Health Alliance M&amp;E Toolkit for New Partners</p> <p><a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/M&amp;E_Toolkit_for_New_Partners.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/M&amp;E Toolkit for New Partners.pdf</a></p>	<p>This is designed to serve as a reference guide for partnerships and includes a glossary of basic M&amp;E terminology, an overview of American International Health Alliance’s monitoring and reporting tools, guidelines on development of performance indicators, as well as M&amp;E-related requirements of USAID, American International Health Alliance’s major funding source. The toolkit also provides selected reference materials partners may use in conducting their own M&amp;E activities, such as survey questionnaires and focus groups.</p> <p>Fairly detailed description of M&amp;E concepts. Includes instructions for conducting focus groups and creating survey questionnaires. Also has links to other resources.</p>
	<p>Twinning Center American International Health Alliance Partnership Self-Assessment</p> <p><a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Partnership_Self-assessment_Survey.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Partnership_Self-assessment_Survey.pdf</a></p>	<p>Survey form for use with partners.</p>
	<p>International Coalition on AIDS and Development Evaluation Framework for International Partnerships and Twinning Projects (August 2006)</p> <p><a href="http://www.icad-cisd.com/pdf/Twinning/Evaluation_Framework_Twinning.pdf">http://www.icad-cisd.com/pdf/Twinning/Evaluation_Framework_Twinning.pdf</a></p> <p>Canadian International Development Agency HIV/AIDS Small Grants Fund: Evaluation Framework (2002)</p> <p><a href="http://www.icad-cisd.com/pdf/Twinning/Evaluation_Framework_Twinning.pdf">http://www.icad-cisd.com/pdf/Twinning/Evaluation_Framework_Twinning.pdf</a></p>	<p>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 help 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:</p> <ol style="list-style-type: none"> <li>1. Determine how the partnership is performing with respect to its objectives, its measurable goals, and its qualitative and quantitative</li> </ol>

Type of Tool	Name/Source	Description/Comments
		<p>indicators.</p> <p>2. Determine if the vision and expectations of each partner is being met.</p> <p>3. Capture the "lessons learned" from the project activities and determine if they can be enhanced.</p> <p>This is an excellent model. The framework is based on three phases: formation and initiation, action and growth, and maintenance and restructuring.</p> <p>Each phase has evaluation questions, indicators/standards, sources, and methods matrices. (Excellent evaluation questions! Good for post-intervention survey.)</p>
M&E	<p>Most Significant Change Technique  <a href="http://www.mande.co.uk/docs/MSCGuide.pdf">http://www.mande.co.uk/docs/MSCGuide.pdf</a>   <a href="http://www.kstoolkit.org/Most+Significant+Change">http://www.kstoolkit.org/Most+Significant+Change</a></p>	<p>Provides definitions and step-wise process for conducting Most Significant Change evaluations. Also includes sample data collection forms and sample stories.</p> <p>Most Significant Change is a good complement to program logic in the creation of a comprehensive M&amp;E and learning framework.</p>
Reports	<p>American International Health Alliance Program Reports  <a href="http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/">http://www.aiha.com/en/ResourceLibrary/MonitoringAndEvaluation/</a></p> <p>Twinning Center Reports  <a href="http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html">http://www.twinningagainstaids.org/twinningtoolkit/monitoring.html</a></p> <p>Partnership Quarterly Progress Report  <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Quarterly_Progress_Report.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Quarterly_Progress_Report.pdf</a></p>	

Type of Tool	Name/Source	Description/Comments
	<p>Trip Report  <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Report.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Trip_Report.pdf</a></p> <p>Event Report Guidelines  <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Event_Report_Guidelines.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Event_Report_Guidelines.pdf</a></p> <p>Sample Event Report  <a href="http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Event_Report.pdf">http://www.twinningagainstaids.org/twinningtoolkit/forms/Sample_Event_Report.pdf</a></p>	
Other	<p>USAID Guide for Incorporating Gender Considerations in Family Planning and Reproductive Health Requests for Applications and Requests for Proposals  <a href="http://www.prb.org/pdf/guideincorpgenderconsid.pdf">http://www.prb.org/pdf/guideincorpgenderconsid.pdf</a></p>	
	<p>USAID Tips for an Evaluation SOW  <a href="http://pdf.usaid.gov/pdf_docs/pnadw103.pdf">http://pdf.usaid.gov/pdf_docs/pnadw103.pdf</a> (tips for preparing an evaluation SOW)  <a href="http://pdf.usaid.gov/pdf_docs/pnadu534.pdf">http://pdf.usaid.gov/pdf_docs/pnadu534.pdf</a> (Checklist for evaluation SOW)</p>	



# TOOL 7: TECHNICAL ASSISTANCE NEEDS AND PEPFAR GENDER STRATEGIC AREAS

The following table can be used as a tool by PEPFAR and USAID teams with implementing partners while planning a technical exchange to strengthen one or more of the PEPFAR gender strategic areas. The types of technical assistance listed are for illustration purposes, meant to help partners develop their own set of technical assistance needs and opportunities. The level of detail to be entered in the individual cells can vary depending on the needs of the planning process. Partners can simply place a check in those cells that match their priority areas for strengthening, or include a more descriptive statement of the desired activities, outcomes, and beneficiaries of the technical exchange. The purpose of the table is to facilitate dialogue and provide greater clarity on the technical assistance needs, opportunities, and desired outcomes of a technical exchange on the PEPFAR gender strategic areas.

	PEPFAR GENDER STRATEGIC AREAS				
Illustrative types of technical assistance	1. Provide gender-equitable HIV prevention, care, treatment and support	2. Implement gender-based violence (GBV) prevention services and provide services for post-GBV care	3. Implement activities to change harmful gender norms and promote positive gender norms	4. Promote gender-related policies and laws that increase legal protection	5. Increase gender-equitable access to income and productive resources, including education
Increase knowledge and skills of staff in one or more of the PEPFAR gender strategic areas					
Strengthen projects/activities and strategic planning through increased integration of one or more of the PEPFAR gender strategic areas					

	PEPFAR GENDER STRATEGIC AREAS				
Illustrative types of technical assistance	1. Provide gender-equitable HIV prevention, care, treatment and support	2. Implement gender-based violence (GBV) prevention services and provide services for post-GBV care	3. Implement activities to change harmful gender norms and promote positive gender norms	4. Promote gender-related policies and laws that increase legal protection	5. Increase gender-equitable access to income and productive resources, including education
Enhance organizational policies and practices to support achievement of one or more of the PEPFAR gender strategic areas					
Support networking and relationship building with community partners and stakeholders to strengthen broader application of one or more of the PEPFAR gender strategic areas into HIV prevention, care, and treatment					
Enhance organization's ability to apply for, use, and leverage external funding to support projects/activities that advance one or more of the PEPFAR gender strategic areas					
Strengthen advocacy with decision makers, policymakers, donors, and other national and international actors to support advancement of one or more of the PEPFAR gender strategic areas at local, regional, national, or international levels					
Other TA needs?					

# TOOL 8: TEMPLATE FOR A MEMORANDUM OF UNDERSTANDING

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## MEMORANDUM OF UNDERSTANDING

### S2S TECHNICAL EXCHANGE

**General Description of Partner Organizations**

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

**Description of Project**

Include goals and objectives and expected benefits of the project.

**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 technical assistance during provider visits, and providing necessary resources agreed to for the implementation of the work.

**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.

**Signatures**

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

*Technical Assistance Provider*

By: \_\_\_\_\_  
(Name and Title)

Date: \_\_\_\_\_

*Technical Assistance Recipient*

By: \_\_\_\_\_  
(Name and Title)

Date: \_\_\_\_\_

*Technical Assistance Facilitator*

By: \_\_\_\_\_  
(Name and Title)

Date: \_\_\_\_\_



# TOOL 9: WORKPLAN TEMPLATE

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## TEMPLATE

Technical Assistance Provider Partner: \_\_\_\_\_

Technical Assistance Recipient Partner: \_\_\_\_\_

Technical Assistance 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:

### *Technical Assistance Provider*

By: \_\_\_\_\_ Date: \_\_\_\_\_

(Name and Title)

### *Technical Assistance Recipient*

By: \_\_\_\_\_ Date: \_\_\_\_\_

(Name and Title)

### *Technical Assistance 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

	<b>Task/Activity</b>	<b>Technical Assistance Provider Role</b>	<b>Technical Assistance Recipient Role</b>	<b>Timing</b>	<b>Milestone or Deliverable</b>

# 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																



# TOOL 10: GUIDELINES FOR DEVELOPING AN M&E PLAN

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The purpose of an M&E plan is to help the technical assistance partners and the facilitator to track progress toward the goals of the exchange, support learning, and provide feedback to partner organizations for programmatic improvements.

The M&E plan illustrated here is specifically designed to monitor progress in the PEPFAR gender strategic areas, and to evaluate the overall success of the S2S exchange. M&E plans that are integrated into project development and planning from the beginning are most effective and most likely to produce relevant, useful data for project management, evaluation, and learning.

On-site assessments and planning documents (e.g., SOW, MOU, workplan) can all contribute to the development of key evaluation questions and indicators of success. In addition, progress reports, activity records, and final reports can be used to document project outputs and outcomes, and to address the evaluation questions.

It is important for the facilitator to conduct an independent assessment of the outcomes and benefits of the technical exchange through surveys or interviews with the technical assistance exchange partners to complement reported data, and to gain a deeper understanding of what worked, and how the technical exchange could have been improved.

Given available resources, a joint learning workshop with the partners and other stakeholders (e.g., government representatives, non-governmental organizations, or other partner organizations) may be valuable for identifying promising practices and lessons learned, and to facilitate networking for future technical exchanges.

[Sample survey](#) and [interview protocols](#) are included in Tools 14 and 15. **Table 1** provides a summary of the key sources of data in an integrated M&E model, followed by a sample evaluation plan.

**Table 1. Data Sources for Integrated Monitoring and Evaluation**

Data Source	Type of Information relevant for M&E
Summary of initial participatory assessment	Both strengths and areas of need for technical assistance and capacity building in recipient organization
SOW	Recipient organization's goals and objectives for the technical assistance exchange
Summary results of on-site assessment	More specific information on recipient organization's strengths and capacity building needs in the PEPFAR gender strategic areas
MOU	Expectations and roles and responsibilities of partner organizations
Workplan	Planned activities, participants, and timeline to track output indicators
Technical assistance activity report and participant evaluations	Project activities actually completed, number and types of participants, immediate outcomes (increase in knowledge and skills), and perceived benefits
Progress reports	Project activities and achievements, success stories, challenges and changes in project strategy, and budget
Post-survey of technical assistance recipient and provider	Perceived benefits, challenges, promising practices, and wishes for the future
Interview of select recipients and providers	Reflections on what went well, what did not and why, challenges, and wishes for the future
Final project report	Project achievements, potential for sustainability and scale-up

# SAMPLE MONITORING AND EVALUATION PLAN FOR SOUTH-TO-SOUTH TECHNICAL EXCHANGE FOR INTEGRATING PEPFAR GENDER STRATEGIES

Evaluation Question	Indicator	Data Sources/Method of Data Gathering	Target
Program goal: To increase the capacity of organizations to advance the PEPFAR gender strategic areas in HIV prevention, care, and treatment, through S2S technical exchanges			
What specific technical assistance activities were conducted and completed as planned? Which of the gender strategies were addressed in the training activities?	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 technical assistance exchange? Which of the gender strategies were addressed in the training materials used for the technical assistance?	Number and types of training materials developed/adapted Ability to adapt training materials and methods to the technical assistance 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

Evaluation Question	Indicator	Data Sources/Method of Data Gathering	Target
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 who rate training as meeting their expectations well or very well
To what extent did the technical assistance meet the technical assistance and capacity building needs of the technical assistance recipient?	Ratings by participants on degree to which training met their technical assistance 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 who rate training as meeting their technical assistance needs well or very well
What new knowledge, skills, or capacities were gained by both technical assistance providers and technical assistance recipients as a result of the technical assistance?	Self-reported increase in knowledge, skills, or capacities by technical assistance 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 regarding multiple and concurrent sex partners, cross-generational sex, and transactional sex.	End of exchange survey of participants	Percentage of participants who report an increase in knowledge or skills, with specific examples of what they learned

Evaluation Question	Indicator	Data Sources/Method of Data Gathering	Target
Has the technical assistance 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 who report changes in individual or organizational behavior, with specific examples of change
In what way has the technical assistance 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 who report new contacts or relationships
What was the cost benefit of the technical assistance program?	Actual cost data for implementing the technical assistance program. Costs are related to staff time and proportionate salary, cost of participation in technical assistance activities, office expenses such as space, equipment, and services needed to support the technical assistance activities.	Review of budgets, invoices, receipts, and other administrative documents	Cost of implementing the technical assistance program will be within approved budget or lower



# TOOL 11: OUTLINE FOR PROGRESS REPORTS

---

Title of Project: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Period of Performance: \_\_\_\_\_

Date of Report: \_\_\_\_\_

Submitted by: \_\_\_\_\_

## 1. **Activities and Achievements**

Describe each technical assistance 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.





# TOOL 12: ACTIVITY REPORT TEMPLATE

---

Name and Date of Technical Assistance Activity:

Date of Report:

Submitted by:

PURPOSE OF TECHNICAL ASSISTANCE ACTIVITY:

DESCRIPTION OF TECHNICAL ASSISTANCE ACTIVITY:

PARTICIPANTS (Attach list of participants by name and title):

OUTCOME OF THE TECHNICAL ASSISTANCE ACTIVITY (observed outcome, including unintended outcomes):

RESULTS OF PARTICIPANT EVALUATION OF TECHNICAL ASSISTANCE ACTIVITY  
(technical assistance provider can use own evaluation form):

FOLLOW-UP PLANS:



# TOOL 13: OUTLINE FOR FINAL PROJECT REPORT

---

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 technical assistance.

## 2. **Summary of Project Goals and Objectives**

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

## 3. **Description of Technical Assistance Provided**

What technical assistance was provided?

## 4. **Analysis**

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

## 5. **Recommendations for Future Technical Assistance Programs**

Looking forward from the point the recipient has achieved through the current technical assistance, where do they want to be in the future? Is there technical assistance 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 technical assistance 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.

# TOOL 14: POST-EXCHANGE SURVEY FOR TECHNICAL ASSISTANCE RECIPIENT AND PROVIDER

## POST-EXCHANGE SURVEY 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 technical assistance achieve its stated goals?				
To what extent did the technical assistance contribute to your knowledge, skills, and capacity for integrating gender strategies in HIV programs?				
To what extent was the technical assistance 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 technical assistance provided?				

1. Please give specific examples of the benefits of the technical assistance for you personally:
  - a. Knowledge gained: \_\_\_\_\_
  - b. Skills developed or strengthened: \_\_\_\_\_
  - c. Capacity built: \_\_\_\_\_
  - d. Other benefits: \_\_\_\_\_

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

Type of technical assistance (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 technical assistance project?

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

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

6. Looking back over the project period, what was the most significant change that took place as a result of the technical assistance 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 SURVEY 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 technical assistance achieve its stated goals?				
To what extent did the technical assistance contribute to the recipients' knowledge, skills, and capacity for integrating gender strategies in HIV programs?				
To what extent was the technical assistance 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 <i>you</i> with the technical assistance provided?				

1. Please give specific examples of the benefits of the technical assistance for the recipients:

a. Knowledge gained: \_\_\_\_\_

b. Skills developed or strengthened: \_\_\_\_\_

c. Capacity built: \_\_\_\_\_

d. Other benefits: \_\_\_\_\_

2. How effective were the following technical assistance methods used?

Type of technical assistance (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 technical assistance project?

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

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

6. Looking back over the project period, what was the most significant change that took place as a result of the technical assistance 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!



# TOOL 15: POST-EXCHANGE INTERVIEWS WITH RECIPIENTS AND PROVIDERS

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## QUESTIONS FOR THE *RECIPIENT* OF TECHNICAL EXCHANGE

Date: \_\_\_\_\_

Interviewed: \_\_\_\_\_

Interviewer: \_\_\_\_\_

### INTRODUCTION

We very much appreciate and celebrate your successful participation in the technical assistance 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 technical assistance exchanges to support implementing partners in HIV.

### EXPERIENCE WITH TECHNICAL EXCHANGE

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

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

3. When you received technical assistance, how did the provider work with you? What did you appreciate most about the technical assistance you received? How could the technical assistance 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, technical assistance, organizational development)?

4. In what ways did the technical assistance 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 technical assistance 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 technical assistance for your organization? (If this is an organization that has had North-based technical assistance, ask them to compare.)

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

10. Reflect on a time when you received excellent technical assistance. 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 technical assistance 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 technical assistance 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 technical assistance exchanges to support implementing partners in HIV.

## EXPERIENCE WITH TECHNICAL EXCHANGE

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

2. Reflect on how you were connected to the technical assistance 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 technical assistance 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 technical assistance recipient planned? If so, what type of follow-up is planned?

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

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

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



9. Reflect on a time when you were really excited about the technical assistance 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 technical assistance 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 [aidsfree.usaid.gov](https://aidsfree.usaid.gov)



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