

**AIDSTAR-Two Project Trip Report – United Kingdom Aug. 30 – Sept. 4, 2009**  
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5 key words:

Brighton  
Guatemala  
Start up  
Plan  
transition

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## CLM Trip Report Template

### Process for completing trip report

1. This **trip report** must be completed by the traveler and distributed to the supervisor, relevant team leader, project manager and AdCo within 10 business days of the traveler's return to their home office.
2. The traveler will schedule a **debriefing** with their project manager and, if appropriate, the project team within 10 business days of their return to their home office. This meeting will highlight content for the trip report. If the traveler is a project manager, they will meet with the project team. The appropriate Team Leader can serve as a resource to determine who else should be present at the debriefing.
3. Trip reports and addenda should be saved with the relevant TDY documents in sub-project eRoom.
4. Completion of the trip report and scheduling debriefings is the responsibility of the traveler.
5. In the event a trip report needs to be filed with USAID mission, the traveler must have the report **reviewed by the appropriate Team Leader first**, when possible, and project manager before sending the report to USAID mission.
6. When the entire template is completed, email the report along with all relevant documents to the relevant Program Manager, Team Leader, and AdCo. AdCo will determine if trip report and which documents should be sent to **Institutional Memory**.
7. Save this report using the following naming protocol: sub-project name\_ traveler's name\_ destination\_program year\_departure month (i.e. Global Fund-Stash- Pakistan -2006-6).

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### **1. Scope of Work:**

Destination and Client(s)/ Partner(s)	The International HIV/AIDS Alliance in Brighton, UK.
Traveler(s) Name, Role	John D. Berman, Project Director Yadira Almodovar-Diaz, Senior Program Officer
Date of travel on Trip	August 30 – September 4, 2009
Purpose of trip	To meet with the Latin America and Caribbean (LAC) Team to discuss program activities for Guatemala, develop a start-up plan for Elden Chamberlain and a transition plan for Kevin Orr, and agree on ways to better collaborate as we enter project year 2 (PY2).
Objectives/Activities/ Deliverables	<ol style="list-style-type: none"> <li>1. To revise work plan for Guatemala reflecting Alliance role/responsibilities for IR2 (including the trafficking conference in Chetumal, Mexico).</li> <li>2. To develop a two-month start up plan for Elden Chamberlain.</li> <li>3. To develop a 30-day transition/hand over plan for Kevin Orr.</li> <li>4. To develop management guidelines for programs in LAC (Honduras, Guatemala, Mexico, and El Salvador) jointly approved Alliance/MSH.</li> <li>5. To develop a joint MSH/Alliance memo on priority actions for a successful PY2.</li> <li>6. To debrief the COTR on progress made during the Brighton visit.</li> </ol>
Background/Context, if appropriate.	

**2. Major Trip Accomplishments:** Should include the major programmatic goals realized, relevant metrics, and stories of impact from the trip.

#### ***Revised work plan for Guatemala reflecting Alliance role/responsibilities for IR2 (including the Human Trafficking and HIV conference in Chetumal).***

Given the changes to the work plan requested by USAID/Guatemala, specifically for *IR2: Improved Social Environment for Vulnerable Populations Accessing HIV Services*, MSH and the LAC Team of the Alliance agreed to have a face-to-face meeting to discuss roles, responsibilities, activities and financial aspects of this component. During this meeting the Alliance agreed to take on the MSM and commercial sex work research activities along with the social mobilization component targeting these populations. Although IR2 includes a component of human/sexual trafficking, the Alliance requested that these activities be conducted by a local partner that has experience in this area. MSH agreed to remove this component from the Alliance's list of deliverables and identify the most appropriate local partner(s) to take the lead on this activity. To ensure a smooth collaboration and coordinated efforts in Guatemala, a set of management guidelines was developed and agreed upon this meeting between the Alliance and MSH (see Annex 1).

Revisions to the work plan will be done in collaboration with MSH and the Alliance. The human/sexual trafficking component to be included in the revised work plan will be identified after the Human Trafficking and HIV Conference to be held in Chetumal, Mexico on September 15-19, 2009. The USAID Activity Manager and MSH staff will meet to discuss and agree on specific activities related to human/sexual trafficking and HIV/AIDS. The final work plan will be submitted by October 9.

To ensure the success of program implementation for PY2, MSH and the Alliance crafted a memo on priority

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actions and ways to ensure better collaboration (see Annex 4).

### ***A two-month “start up” work plan for Elden Chamberlain and 30-day “transition/hand over” work plan for Kevin Orr***

With the transfer of Elden Chamberlain into the position of Network Capacity Building Advisor seconded to MSH, both organizations agreed to develop a start-up plan to ensure a smooth transition and accelerate program implementation (see Annex 2). During the visit the team also discussed and agreed on overall management and day-to-day responsibilities for Elden and the soon to be hired Senior Program Officer that will take Kevin’s position on AIDSTAR-Two. The results of this last meeting are reflected in Kevin’s transition plan described on Annex 3.

#### ***Other deliverables include:***

- Joint MSH/Alliance memo on priority actions for a successful PY2.
- Management guidelines for programs in LAC (Honduras, Guatemala, Mexico, and El Salvador) jointly approved Alliance/MSH.
- COTR debrief on progress of Brighton meetings.

### **3. Next steps:** Key actions to continue and/or complete work from trip.

<b>Description of task</b>	<b>Responsible staff</b>	<b>Due date</b>
Meeting to discuss the agenda and set up final appointments with Alliance staff	Natasha, Kevin, Elden, John and Yadira	Sept. 1 (completed)
Met with Anamaria Bejar, Head of the Latin American and Caribbean Team at the Alliance to discuss IR2 activities.	Anamaria, John and Yadira (Ruth was out of the office)	Sept. 2 (completed)
Presentation on AIDSTAR-II IQC and AIDSTAR-Two Tasks 1, 2 and 3	Elden, Kevin, Natasha, John, Yadira and LAC Team, Finance and Contracts	
Participated in the Pathway to Improve HIV/AIDS Implementing Partners and Networks Conference call	AIDSTAR-Two Consortium	
First meeting with Ruth Ayarza to discuss: <ul style="list-style-type: none"> <li>• Overall project in Guatemala</li> <li>• Alliance-specific activities under IR2</li> <li>• Strategies to be used</li> </ul>	Ruth, John, Yadira	
Second meeting with Ruth Ayarza to discuss: <ul style="list-style-type: none"> <li>• Staffing</li> <li>• Program management</li> <li>• Budget</li> <li>• Revisions to work plan</li> <li>• Next steps (contract mod, site visit, etc.)</li> </ul>	Ruth, John and Yadira	Sept. 3 (completed)
Call with Eugenia Monterroso, AIDSTAR-Two COP/Guatemala to: <ul style="list-style-type: none"> <li>• Introduce her to Ruth</li> <li>• Discuss project activities and strategies and build</li> </ul>	Ruth, Eugenia, John and Yadira	

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consensus • Discuss next steps		
Meeting to discuss Alliance's finances under AIDSTAR-Two	Elden, Kevin, Natasha, John, Yadira	
<ul style="list-style-type: none"> <li>Meeting to discuss Elden's roles and responsibilities.</li> <li>Crafted a detailed staff management plan for Elden.</li> <li>Discussed and finalized Elden's 60-day start-up plan.</li> <li>Discussed Kevin's transition plan.</li> </ul>	Elden, Kevin, Natasha, John, Yadira	
Debriefing with COTR	Christian, Elden, Kevin, Natasha, John, Yadira	
Meeting to discuss status of Alliance's activities under AIDSTAR-Two	Alvaro Bermejo, Jane Waterman, Natasha, Kevin, Elden, John, Yadira	
Wrap-up meeting with Kevin	Kevin, John and Yadira	Sept. 4

**4. Contacts:** List key individuals contacted during your trip, including the contacts' organization, all contact information, and brief notes on interactions with the person.

Name	Contact info	Home organization	Notes
N/A			

**5. Description of Relevant Documents / Addendums:** Give the document's file name, a brief description of the relevant document's value to other staff, as well as the document's location in eRooms or the MSH network. Examples could include finalized products and/or formal presentations, TraiNet Participant List, Participant Contact sheet, and Meeting/Workshop Participant Evaluation form are examples of relevant documents.

File name	Description of file	Location of file
Annex 1: Management Responsibilities of AIDSTAR-Two Guatemala		E-room
Annex 2: Two-month start-up plan for Elden Chamberlain		E-room
Annex 3: Kevin Orr's Transition Plan		E-room
Annex 4: Memorandum of Collaboration between MSH and the International HIV/AIDS Alliance		E-room

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### Annex 1: Management Responsibilities of AIDSTAR-Two/Guatemala

Consortium Lead	Roles & Responsibilities
MSH – COP	<ul style="list-style-type: none"> <li>• Overall manager of the entire program in Guatemala</li> <li>• Lead manager of IR1 &amp; IR3</li> <li>• Responsible for the timely submission of all contractual deliverables</li> <li>• Coordination &amp; direct collaboration with the Alliance on IR2</li> <li>• Identification of and direct coordination with lead organization that will conduct human trafficking study</li> <li>• Lead recruitment efforts in collaboration with MSH/SPO, including the Social Mobilization Advisor</li> <li>• Line manager of Social Mobilization Advisor seconded to the Alliance</li> <li>• Liaison with USAID/Guatemala along with MSH/SPO</li> </ul>
MSH – SPO	<ul style="list-style-type: none"> <li>• Line manager of MSH/COP</li> <li>• Day-to-day management support for the entire project</li> <li>• Liaison with USAID/Guatemala along with MSH/COP</li> <li>• Serve as back-up for PD's role on the project</li> </ul>
MSH – PD	<ul style="list-style-type: none"> <li>• Submission of international travel authorizations for COTR's approval</li> <li>• Engage COTR on programmatic activities, as needed</li> </ul>
The Alliance – SPO	<ul style="list-style-type: none"> <li>• Overall manager of IR2 with the exemption of the trafficking study</li> <li>• Direct communication with MSH's SPO, PD and COP prior to submitting documents or engaging in communications with USAID</li> <li>• Submission of the Alliance's international travel requests to PD and SPO</li> <li>• Provide technical direction to the Social Mobilization Advisor regarding IR2 activities</li> <li>• Manager of all administrative and financial aspects of the contract on behalf of the Alliance</li> </ul>
The Alliance – US Director and/or AS-Two SPO	<ul style="list-style-type: none"> <li>• Final approval of work plan, budget and programmatic changes</li> </ul>
TBD	<ul style="list-style-type: none"> <li>• Lead the human trafficking and HIV/AIDS study</li> </ul>

#### MSH:

- Eugenia Monterroso – Chief of Party (COP)
- Yadira Almodovar-Diaz – Senior Program Officer (SPO)
- John D. Berman – Project Director

#### The Alliance:

- Ruth Ayarza – Senior Program Officer (SPO)
- Natasha Sakolsky – US Director
- Kevin Orr – AIDSTAR-Two Senior Program Officer for the Alliance (AS-Two SPO)

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### Annex 2: Two-month start-up plan for Elden Chamberlain

Week	Task
<b>24 – 28 Aug</b>	<b>Brighton</b> Handover from Kevin Orr Introduction to LAC Team and Mexico / El Salvador projects
<b>1- 4 Sep</b>	<b>Brighton</b> Orientation to AS2 with John Berman / Natasha Sakolsky <ul style="list-style-type: none"><li>• Position</li><li>• AIDSTAR-Two</li><li>• USAID</li><li>• MSH</li><li>• Alliance LAC Team</li></ul>
<b>7 – 11 Sep</b>	<b>Bangkok</b> Continued Discussions with APCOM / AFAO(AusAID) on issues / support required for INSULAR MSM network
<b>14 – 25 Sep</b>	<b>Bangkok</b> Finalise report / recommendations on INSULAR Partner Engagement in Mexico and El Salvador in conjunction with LAC Team to begin process of developing country plans Develop ToR for Country Visits
<b>28 Sep – 2 Oct</b>	Relocate to DC
<b>5 – 16 Oct</b>	<b>Washington DC</b> Orientation to MSH and Alliance US offices / processes / procedures Finalise Tor and planning for Mexico/El Salvador Trips Alliance US strategic planning Define / develop roles/responsibilities with Sarah Ford Meeting with Christian Fung Meeting with USAID LAC team Meeting with Estelle Queen Develop performance objectives
<b>19 – 23 Oct</b>	El Salvador Program Planning Trip
<b>26 – 30 Oct</b>	Mexico Program Planning Trip
<b>2 – 6 Nov</b>	Finalise work plans for Mexico / El Salvador

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### Annex 3: Kevin Orr's Transition Plan

#### 1. Reality check: 18 days from next week

Sep 7	Sep 8	Sep 9	Sep 10	Sep 11
Sep 14	Sep 15	Sep 16	Sep 17	Sep 18
Sep 21	Sep 22	Sep 23	Sep 24	Sep 25
Sep 28	Sep 29	Sep 30		

#### 2. Priorities

- A. Write Alliance's brief manual: Operational Guidance for Managing Activities Contributing to the AIDSTAR-Two Project – **4 days**
- B. Write and compile: handover package for new half-time programme officer – **1.5 days**
- C. Ensure completion of decentralized project management and accountability for the following Alliance activities – **6 days**

This will involve: verifying programmatic consistency between AIDSTAR-Two priorities and deliverables, and the understanding of Alliance teams implementing activities; ensuring teams achieve management and administrative consistency<sup>1</sup>, and ensuring paper trail is accessible to relevant personnel (programmatic, best practice, finance, contracts).

- 1. OVCsupport.net
  - 2. IDU care and support
  - 3. Alliance inputs to MSH for capacity building methodology guidance (Task 1)
  - 4. Strengthening service providers networks
  - 5. MSM in Eastern Europe
  - 6. Regional Technical Support
  - 7. USAID compliance strengthening (Task 1)
  - 8. Buy-in strategies: MSM in sub-Saharan Africa – support to missions
  - 9. Buy-in strategies: Possibility of expansion of Task 2
  - 10. Buy-in strategies: Field support for building capacity for USG programming<sup>2</sup>
- D. Finish concept for MSM in sub-Saharan Africa – support to missions – **1 day**
  - E. Strengthen compliance for this sub-contract by developing pilot time tracking system for Alliance's AIDSTAR-Two efforts – **1 day**
  - F. Responding to AIDSTAR-Two and USAID requests (for information, etc.) as needed – **3 days**
  - G. Support Kendal to establish the Alliance's AS2 intranet site – **0.5 day**
  - H. Clear desk and filing – **1 day**

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<sup>1</sup> Related to 1) consortium, 2) activity development and project management, 3) working under a USAID sub-contract, and 4) specific compliance priorities

<sup>2</sup> Based on e.g. of Lesotho – clarify for Alliance how this can work i.e. consortium working and implementation arrangements, and how to be clearer to missions re. what AS2 can do and how missions can use it

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### **Annex 4: Memorandum of Collaboration between MSH and the International HIV/AIDS Alliance**

To: Jane Waterman, the Alliance; Tim Allen, MSH.  
From: John Berman, MSH; Natasha Sakolsky, The Alliance  
Cc: [ ]  
Re: Priority Actions for a successful Project Year Two  
Date: September 3, 2009

We look forward to a productive second year of collaboration on AIDSTAR-Two. To that end, we propose to continue and/or initiate the following actions to help assure the efficacy of our collaboration and of the program generally.

1. Bi-weekly meeting with Alliance/USA Director to review progress, any outstanding issues.
2. Monthly narrative reports from Alliance [*see language in contract*] with updates on all project activities executed through sub-award.
3. Joint participation in monthly COTR meetings, any other meetings with USAID/OGAC pertaining to AIDSTAR-Two.
4. Quarterly joint webinar presentation on respective activities to HQ staff in Cambridge (US), Brighton, UK.
5. Completion/dissemination of partnership principles memorandum.
6. Alliance staff visits (Elden, Natasha) to meet with senior MSH staff in Cambridge, USA.
7. ??