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SOUTH-TO-SOUTH TECHNICAL EXCHANGE ON INTEGRATING PEPFAR GENDER STRATEGIES: FRAMEWORK AND TOOLKIT

ASSESSMENT OF PILOT

AIDSTAR-One
AIDS SUPPORT AND TECHNICAL ASSISTANCE RESOURCES

JUNE 2013

This publication was made possible through the support of the U.S. President's Emergency Plan for AIDS Relief (PEPFAR) through the U.S. Agency for International Development under contract number GHH-I-00-07-00059-00, AIDS Support and Technical Assistance Resources (AIDSTAR-One) Project, Sector I, Task Order I

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AIDS Support and Technical Assistance Resources, Sector I, Task Order 1 (AIDSTAR-One) is funded by the U.S. President's Emergency Plan for AIDS Relief (PEPFAR) through the U.S. Agency for International Development (USAID) under contract no. GHH-I-00-07-00059-00, funded January 31, 2008. AIDSTAR-One is implemented by John Snow, Inc., in collaboration with BroadReach Healthcare, EnCompass LLC, International Center for Research on Women, MAP International, mothers2mothers, Social & Scientific Systems, Inc., University of Alabama at Birmingham, the White Ribbon Alliance for Safe Motherhood, and World Education. The project provides technical assistance services to the Office of HIV/AIDS and USG country teams in knowledge management, technical leadership, program sustainability, strategic planning, and program implementation support.

Recommended Citation

Gutmann, Mary, Lyn Messner, and Matthew Haight. 2013. *South-To-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit—Assessment of Pilot*. Arlington, VA: USAID's AIDS Support and Technical Assistance Resources, AIDSTAR-One, Task Order 1.

Acknowledgments

Special thanks to Irene Ramatala, Mosarwa Segwabe, and Maina Kiranga, USAID/Botswana; Peter Loeto, CDC/Botswana; Naomi Makgolo, U.S. Department of State/Botswana; Wessel van den Berg, Juliana Davids, and Rodney Fortuin, Sonke Gender Justice Network; and Lisa Jamu, Stepping Stones International, for their participation in and their feedback on the report of the pilot of the *South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit*. Their efforts and perspectives contributed greatly to the findings and recommendations presented here. Thanks to the PEPFAR Gender Technical Working Group for its vision and support for the pilot and this assessment.

AIDSTAR-One

John Snow, Inc.
1616 Fort Myer Drive, 16th Floor
Arlington, VA 22209 USA
Phone: 703-528-7474
Fax: 703-528-7480
E-mail: info@aidstar-one.com
Internet: aidstar-one.com

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ACRONYMS

AIDS	acquired immune deficiency syndrome
AIDSTAR-One	AIDS Support and Technical Assistance Resources
CDC	U.S. Centers for Disease Control and Prevention
HIV	human immunodeficiency virus
MOU	memorandum of understanding
PEPFAR	U.S. President's Emergency Plan for AIDS Relief
S2S	South-to-South
Sonke	Sonke Gender Justice Network
SOW	statement of work
SSI	Stepping Stones International
TA	technical assistance
USAID	U.S. Agency for International Development

BACKGROUND

South-to-South (S2S) cooperation—defined as an exchange of expertise and resources between governments, organizations, or individuals in developing nations—has gained increasing momentum as a practical, flexible way to promote regional collaboration among countries facing common challenges. South-to-South technical assistance (TA) is an important component of the U.S. President’s Emergency Plan for AIDS Relief (PEPFAR) Five-Year Strategy (2010–2015) to foster country ownership and stronger regional collaboration.¹

In 2011, AIDSTAR-One developed the *South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit*² to serve as a guide for facilitating S2S technical assistance to advance implementation of one or more of the five cross-cutting gender strategic areas of the PEPFAR Gender Strategy, outlined in Box 1.³

In 2012 and 2013, AIDSTAR-One piloted this Framework and Toolkit in collaboration with PEPFAR, Stepping Stones International (SSI) in Botswana, and the Sonke Gender Justice Network (Sonke) in South Africa (see Annex 1: Organizational Descriptions). The pilot allowed AIDSTAR-One to use this Framework and Toolkit to test its feasibility in facilitating S2S technical exchanges beyond a one-time TA activity to include a series of supports via field visits and phone and email exchanges to foster a sustained, supportive relationship between two South-based organizations.

Box 1. PEPFAR Gender Strategic Areas

1. Increasing gender equity in HIV/AIDS programs and services, including access to reproductive health services
2. Preventing and responding to gender-based violence
3. Engaging men and boys to address norms and behaviors
4. Increasing women and girls’ legal protection
5. Increasing women and girls’ access to income and productive resources, including education.

¹ U.S. President’s Emergency Plan for AIDS Relief (PEPFAR). n.d. *The U.S. President’s Emergency Plan for AIDS Relief Five-Year Strategy: 2010–2015*. Washington, DC: PEPFAR.

² Crye, Lisa, and Mary Gutmann. 2011. *South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit*. Arlington, VA: USAID’s AIDS Support and Technical Assistance Resources (AIDSTAR-One), Task Order 1. Available at http://www.aidstar-one.com/focus_areas/gender/facilitating_south_to_south (accessed April 2013).

³ PEPFAR. 2012. *Technical Considerations Provided by PEPFAR Technical Working Groups for FY 2013 COPS and ROPS*. Washington, DC: PEPFAR.

GOALS AND OBJECTIVES

The purpose of this assessment was to reflect on the use of the *AIDSTAR-One South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit* to facilitate a S2S technical exchange in Botswana by identifying what worked well, and how to improve the process. This was not an assessment of the TA provided.

The assessment took place from May 2012 to January 2013 and was designed to fulfill the following objectives:

- Assess the extent to which the S2S technical exchange achieved its objectives and the level of satisfaction with the process by PEPFAR/Botswana, the TA provider, and the TA recipient
- Understand better the successes and challenges of implementing S2S technical exchanges, and identify promising practices that may be considered by other USAID missions and program planners when implementing S2S technical exchanges
- Identify lessons learned and recommendations for improving the design and implementation of S2S technical exchanges to build capacity for integrating gender strategic areas into PEPFAR programs.

METHODOLOGY

In 2012 PEPFAR/Botswana requested assistance with providing high-quality technical assistance and capacity building for a local implementing partner, SSI, to integrate one or more PEPFAR gender strategic areas into its HIV project activities and organizational policies. The technical exchange was envisioned to achieve the following objectives:

- Increase the knowledge base and skills of SSI staff and stakeholders in methods for integrating PEPFAR gender strategic areas into their activities with and for orphans and other vulnerable children ages 12 to 18 years
- Enhance organizational policies to support high-quality, effective gender integration strategies
- Support networking and relationship building between SSI and community stakeholders to sustain the momentum for integrating gender strategic areas into HIV programming.

The South Africa-based Sonke Gender Justice Network was selected as the technical assistance provider based on its expertise in engaging men and boys and the specific TA needs of SSI. The AIDSTAR-One team worked closely with Sonke and SSI to negotiate and develop a statement of work (SOW), memorandum of understanding (MOU), workplan, and budget for the technical assistance that clearly stated the agreed-upon goals and objectives, roles and responsibilities, and general terms and conditions of the partnership. The AIDSTAR-One subgrant to Sonke was finalized at the end of September, and joint activities between SSI and Sonke occurred between October 1, 2012, and March 29, 2013.

The data used and analyzed for this assessment came from: a) a review of documents and communications related to the technical exchange (e.g., MOU, work plans and budgets, training agenda, mid-term and final reports, summary of conference calls), and b) three semi-structured individual or group telephone interviews with six staff from PEPFAR/Botswana, Sonke, and SSI all of whom were directly involved in the S2S technical exchange (see Annex 2: Interview Guides). The qualitative data from the desk review and interviews were analyzed to identify the emergent themes, lessons learned, and recommendations for using the AIDSTAR-One Framework and Toolkit.

FINDINGS

The assessment findings, presented below, relate to the following three major areas of inquiry:

1. The S2S technical exchange *process*
2. *Use* of the AIDSTAR-One Framework and Toolkit in facilitating the process
3. *Achievements and perceived benefits* of the S2S technical exchange beyond its technical goals and objectives.

PROCESS

South-to-South technical exchanges require three actors: an organization that receives technical assistance (the “TA recipient”), an organization that provides technical assistance (the “TA provider”), and an entity that facilitates the process (the “TA facilitator”). The facilitator can be a U.S. Government mission, funding mechanism, or implementing partner (in the case of this pilot, AIDSTAR-One served as the TA facilitator).

IDENTIFYING AND MATCHING THE TA PROVIDER AND TA RECIPIENT.

Respondents remarked that the toolkit helps outline the steps and processes for selecting a TA provider, but does not give equal consideration to the steps for identifying and selecting the TA recipient. The findings also show that forming an interagency group can help make the process of selecting the TA recipient and provider more objective.

At the PEPFAR country team level, the formation of an interagency group that included members from all PEPFAR agencies, was critical to the process of determining which implementing partners should receive assistance and be selected for this technical exchange. This team, led by USAID because of the funding mechanism, allowed for a deeper scan and analysis of potential TA recipients. The country team developed internal criteria for selection that included which organization would most benefit from the technical exchange, and how the organization would utilize and share those benefits in support of the PEPFAR Gender Strategy.

“We must identify an organization who will be able to use the skills to strengthen their programs and others’ programs so there will be more people on the ground able to provide technical assistance.”

The use of an interagency team was seen to provide more objectivity and balance in the decision-making process than if the selection process was done by one agency in isolation. The process of identifying and selecting a TA provider and recipient takes time and needs to be managed carefully, with full consideration of both local constraints and organizational needs. Respondents felt strongly that making time available for a carefully managed and well-informed process for identifying, selecting, and briefing the best TA recipient is important to the success of the TA exchange and cannot be shortchanged.

Given that S2S technical exchanges are not intended to be one-off TA events, but to build a lasting relationship between south-based organizations, it is best to design the technical exchange between one TA provider and one TA recipient. Previous or existing relationships between potential TA partners may increase the likelihood of a sustainable relationship and be a factor to consider in selecting the TA provider and recipient. SSI and Sonke had recently partnered on another project that had parallel goals, which facilitated relationship building and mutual understanding. It also allowed them to overcome unforeseen challenges such as delays in funding, because additional resources were available through another mechanism.

The process for selecting the TA recipient and provider needs to take into consideration a number of factors such as matching areas of interest and capacity to engage in a S2S exchange. This process was “grey” in the beginning for some involved because proper orientation to the AIDSTAR-One Framework and Toolkit was not provided prior to the initial call with all actors. However, the initial meeting (via conference call) held with all parties at the onset of the technical exchange proved valuable for establishing a common understanding and vision among all partners, and clarifying respective roles. All partners found this initial call to be extremely informative and useful to set the stage for the collaborative work ahead.

“The process was a bit grey, but the phone call with all the partners helped and we knew we would receive TA in gender and I created a brief of our needs.”

PLANNING AND IMPLEMENTING THE TECHNICAL EXCHANGE

The AIDSTAR-One Framework and Toolkit provides various tools and templates to facilitate a dynamic, participatory process. The process starts with an assessment to clarify the technical assistance needs and continues with developing an SOW, MOU, and workplan for implementing, monitoring, and evaluating the technical exchange. The findings show that this process and the tools and templates worked well, especially for the TA provider, and facilitated the development of a mutually agreed-upon and “owned” SOW and workplan.

“At the end of the day, [we] ended up with a workplan that [we] both can own because [we] worked together.”

An initial on-site assessment by the TA provider is an invaluable step for clarifying the TA needs and capacity of the TA recipient to absorb and use the learning from the technical exchange. Depending on the initial request for TA, the needs assessment can include a variety of activities, including a review of program and policy documents, interviews with staff and key stakeholders, observation of program activities, and above all, ongoing consultation with the TA recipient on the needs, methods, and expected results of the proposed technical exchange. A consultative, participatory process during the needs assessment not only helps both partners gain a better understanding of the TA needs, but generates excitement and buy-in for the workplan that emerges from the needs assessment findings.

Similarly, a participatory, collaborative process for planning the specific technical exchange contributes to the success and perceived benefits of the interactions. The TA recipient brings important value to the planning process through its knowledge of the local context and relationships with key stakeholders.

Early, direct contact between all partners, either by phone or face-to-face, was seen as extremely important and useful for developing a common understanding and vision of the technical exchange and setting the stage for the collaborative work going forward. Similarly, a mid-point conference call was useful for monitoring progress, identifying successes and challenges, allowing joint problem solving, and planning next steps for sustainability of the relationship and the technical exchange.

Continuous, open communications and frequent consultation between the partners via email, telephone or face-to-face meetings throughout the technical exchange is critical to the success of both the relationship and the technical exchange. Joint planning and design of learning events, sharing of documents and planning tools, and mutual feedback on the technical exchange process (e.g., participant evaluations of training events) can facilitate and strengthen the partnership and collaborative process. Again, the initial conference call between all partners was critical for developing a common vision and clarifying expectations about both outcomes and processes.

Procedural guidance and administrative support by the facilitating organization was helpful during the planning and implementation phase, particularly around how to use the AIDSTAR-One Framework and Toolkit to develop planning documents, workplans, and report formats.

The findings indicated the following challenges in implementing a S2S technical exchange, which were not anticipated in the toolkit:

- Communications between all parties can be challenging given logistical and technical difficulties and competing priorities such as internet connectivity, travel schedules, and other project commitments. Sufficient time and flexibility must be built into the planning process to allow partners to address communication challenges and scheduling constraints during the course of the technical exchange.
- Administrative requirements and procedural delays may be a challenge, depending on the funding mechanism used to implement the S2S technical exchange. The duration of the technical exchange must allow sufficient time for the required bureaucratic procedures such as grants review and administration, budget preparation, funds transfer, documentation, and reporting requirements. In addition, the budgets for the technical exchanges must be large enough to allow sufficient investment of time to complete both the technical work and corresponding the administrative requirements.
- The biggest challenge during this pilot was delays in funds transfer to Sonke due to administrative errors. These delays resulted in multiple changes and postponements in implementing the planned activities. These delays were difficult for all TA partners, and especially for the TA recipient that had to balance ongoing field work with the TA visits.

USE OF THE AIDSTAR-ONE FRAMEWORK AND TOOLKIT

The AIDSTAR-One Framework and Toolkit was created primarily as a guide for PEPFAR country teams to facilitate S2S technical exchanges between South-based organizations and local implementing partners. The findings show that the Framework and Toolkit can also serve as a resource for TA providers and recipients in planning and implementing the technical exchange.

The planning tools and sample forms in the toolkit were found to be particularly useful for the TA provider in responding to the AIDSTAR-One request for assistance and in the planning process.

“The toolkit was brilliant because it assisted us in coming up with the workplan, MOU, SOW...in terms of using that as a guideline to complete the entire planning process, and made it very easy for us.”

However, the availability and application of the AIDSTAR-One Framework and Toolkit for technical exchanges need to be made clear from the beginning of the process. All partners should be oriented to the Framework and Toolkit so that it can be used by the whole team as a road map to plan, implement, monitor, and evaluate the technical exchange.

“It is important that when you engage with an organization that you make it clear to them what the toolkit can be useful for.”

The AIDSTAR-One Framework and Toolkit includes a list of South-based organizations that can provide technical assistance in one or more of the PEPFAR gender strategic areas and a checklist with criteria for selecting a TA provider. USAID/Botswana found the list an useful resource and for identifying an appropriate TA provider that best matched SSI’s needs for developing organizational policies on gender equity and in engaging men and boys. These tools were found to be useful by the country team in identifying a TA provider that had the specific expertise needed for the technical exchange. However, the toolkit does not include a comparable checklist and guidelines for selecting a TA recipient. A similar checklist or guidelines for selecting a TA recipient might include an assessment of the organization’s readiness and capacity to engage in a S2S technical exchange, such as location of staff (centralized vs. decentralized) and ability to sustain the relationship. The TA recipient’s ability to extend the technical benefits to other stakeholders and serve as an advocate or champion of the issue is also an important consideration. The “multiplier effect” could be a positive spinoff of the technical exchange process. Development and inclusion of these resources for selecting a TA recipient would improve the usability of the toolkit and ease the TA recipient selection process.

ACHIEVEMENTS AND PERCEIVED BENEFITS

The assessment findings suggest that the AIDSTAR-One Framework and Toolkit was useful in helping partners plan and implement the S2S technical exchange, and that the partners derived benefits from the experience above and beyond the technical goals and objectives. Since the assessment was conducted prior to the completion of the S2S technical exchange, the findings do not address the achievement of all technical objectives. All partners, however, expressed positive views about what had been achieved and the benefits gained as a result of the experience. Both partners were excited by the establishment of a new relationship in the region around a common interest in gender equity, and the likelihood of extending this relationship beyond the technical exchange itself. The assessment findings indicate that the TA partners were generally satisfied with the technical exchange process and that it was a good learning experience for the future. The partners felt that the gender focus increased their ability to engage other national and regional partners in the PEPFAR gender strategic areas and strengthen their portfolio in an area that PEPFAR identifies as a priority.

Working on gender we are now able to do it at an international level so we are at a higher standard, and we can share it with others. That has been beneficial for us.

Participation in a S2S technical exchange may be a new experience for many implementing partners, and learning how to plan, administer, and manage the whole process is a capacity building process in

itself. There is now a much better understanding and appreciation of the process for selecting and matching TA recipients and providers, ongoing communications and collaboration between partners and generation of mutual excitement and enthusiasm that transform the relationship from a one-off technical exchange to a sustainable partnership toward a common goal in the future.

[...]getting familiarized with a solid, thought-out process for providing technical assistance that we'll use elsewhere and improve our technical assistance processes.

The technical assistance partners, in general, felt that S2S technical exchanges are not different from North-to-South technical exchanges other than geographic proximity and a better understanding of the cultural context by the TA provider.

LESSONS LEARNED

- The AIDSTAR-One Framework and Toolkit can be used effectively to facilitate planning and implementation of a S2S technical exchange to advance one or more of the PEPFAR gender strategic areas.
- PEPFAR country teams remain the primary target audience for the Framework and Toolkit, but the resource can be made more relevant and useful for all three partners (TA provider, recipient and facilitator).
- The process is most successful when clear guidance is provided to each of the TA partners on how to use the Framework and Toolkit to facilitate planning, implementation, monitoring, and evaluation of a S2S technical exchange.
- Depending on the mechanism for facilitating the technical exchange, it is important to ensure that adequate time and resources are made available for the administrative, financial, and procedural requirements. Partners must expect and be prepared to accommodate delays, communication challenges, and other logistical and administrative concerns during the course of the exchange.
- Additional guidance and tools would be useful in the Framework and Toolkit for the very important initial step of selecting the most appropriate TA provider and recipient. This will help ensure an optimal match that will lead to a long-term relationship between the two organizations. Sufficient time is needed for the country team to accomplish this important and sensitive task, and must be incorporated into the overall planning of the technical exchange.
- The benefits of a S2S technical exchange extend beyond the transfer of technical knowledge and skills to strengthening partners' abilities to engage in future technical exchanges within the larger community of actors in furthering the PEPFAR Gender Strategy.

RECOMMENDATIONS

Recommendations are organized as follows: for country teams, for the TA providers and recipients, for the TA facilitator, and for improving the Framework and Toolkit.

SPECIFIC RECOMMENDATIONS FOR COUNTRY TEAMS

- Once a country team has identified a need for an S2S technical exchange, they should do one of two things: 1) find resources within new or existing funds for the technical exchange or 2) find a mechanism (e.g., AIDSTAR-One) through which the technical exchange can be implemented.
- An existing relationship (or previous work together or future planned work) between the TA recipient and provider being considered could increase the likelihood that the technical exchange would not be a one-off event, but lead to a long-term, sustainable, mutually beneficial relationship.
- It is best when the technical exchange is between one TA provider and one TA recipient, because S2S technical exchanges are intended to build lasting relationships between the two south-based organizations, rather than to be “one-off” TA events.

SPECIFIC RECOMMENDATIONS FOR TA PROVIDERS AND RECIPIENTS

- Be prepared to address administrative requirements inherent in any mechanism used to implement the technical exchange. The designation of a TA manager to handle this aspect of the technical exchange can be useful.
- Look beyond the specific technical exchange activity to understand and appreciate how the exchange might contribute to a long-term relationship for building capacity and sustainable change.
- Engage directly and quickly with TA partners in a participatory, collaborative process for developing, planning, and implementing the technical exchange and relationship building beyond the activity.
- Reflect on the process of the technical exchange to identify factors that contribute to its success and identify ways it can be strengthened or improved in future exchanges. Use or share these lessons with other partners and organizations to generate new opportunities for S2S exchanges in areas of common interest and investment.
- Identify resources to increase the likelihood that the technical exchange will not be a one-off event, but lead to a long-term, sustainable, and meaningful relationship.

SPECIFIC RECOMMENDATIONS FOR TA FACILITATORS

- Invest time and care in planning the technical exchange. This includes developing a realistic timeline with established check-in points to facilitate communications and address changes in the workplan in a timely manner. Sufficient time is also needed for identifying and selecting the TA provider and recipient to ensure a successful match. It is important to ensure that the two organizations are compatible and aligned with each other's objectives and end goals. This requires a thorough assessment of partners' capacity to provide or receive the technical assistance and make good use of its benefits, not just for this one instance but to contribute to the broader agenda of the PEPFAR Gender Strategy.
- Inform the TA partners about the AIDSTAR-One Framework and Toolkit and assist them in using it to facilitate planning and implementing the technical exchange.
- Facilitate and support ongoing communications and direct engagement of the TA partners to enhance collaborative planning, participatory activities, and joint learning in a mutually beneficial relationship. The facilitator role includes bringing the TA partners together in an initial meeting or conference call to introduce them and develop a common understanding and vision of the technical exchange. A midpoint call is also important to monitor progress and plan for sustainability, including developing follow-up plans.
- Reflect, with the TA partners, on the technical exchange process to use this as a learning opportunity for improving future S2S technical exchanges.

SPECIFIC RECOMMENDATIONS FOR IMPROVING THE FRAMEWORK AND TOOLKIT

- Incorporate a step to designate a TA manager for each of the partners (TA recipient, provider, and facilitator) to streamline communications, address management challenges, and represent the organization administratively and programmatically.
- State explicitly that the TA facilitator should organize an initial meeting (or phone call) that brings all parties together to begin the planning process and a midpoint call with all partners to monitor progress, provide an opportunity for joint problem solving, and agree on a plan for the completion of the activities.
- Reframe to serve as a road map and resource for all the TA partners to facilitate the planning, implementation, monitoring, and evaluation of the technical exchange. The primary target audience for the AIDSTAR-One Framework and Toolkit is any PEPFAR country team interested in facilitating a S2S technical exchange, but it could be a useful resource for all TA partners. Clearly state how it can be used by various partners at various stages of the technical exchange process. The TA facilitator can play an important role in guiding the TA partners on the use of the Framework and Toolkit in planning and implementing the technical exchange.

- Develop a checklist for the selection of the TA recipient, similar to the existing checklist for selecting a TA provider. The checklist should include an assessment of both technical and organizational capacity to engage in and benefit from the technical exchange. This could include, for example, a template for potential TA recipients to complete that provides a one-page description of what they perceive to be their TA needs and how they would use the benefits to strengthen their programs and policies.
- Add a step for briefing the TA partners on the technical exchange to discuss expectations, time and resource requirements, procurement, and other administrative issues. On what, how, and when the technical assistance partners are briefed can have a direct bearing on how they understand the technical exchange activity and how it is implemented.

CONCLUSION

The assessment of the pilot S2S technical exchange in Botswana demonstrated that the AIDSTAR-One Framework and Toolkit can be used effectively to facilitate the process of planning and implementing a S2S technical exchange for the integration of one or more of the PEPFAR gender strategic areas. The findings also revealed some areas that could be strengthened or improved. Orienting all technical exchange partners to the resources in the Framework and Toolkit can enhance its use in the planning, implementation, and monitoring and evaluation phases. A collaborative, participatory process and good communication between all partners are crucial to the success and long-term benefits of the technical exchange. These benefits can extend beyond the transfer of technical knowledge and skills to enable partners to engage in future S2S exchanges with other national and regional partners.

ANNEX I

ORGANIZATIONAL DESCRIPTIONS

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

Sonke specializes in training and capacity building, working with men and boys to address the spread and impact of HIV and prevent gender-based violence. Their programs include training on the use of the following social change strategies: community education, community mobilization, policy development and advocacy, media for social change, and building local, regional, and global coalitions and networks.

Stepping Stones International (SSI) (<http://www.steppingstonesintl.org/newsite/>), a Botswana-registered (2006) nongovernmental organization based in Mochudi in Kgatleng district, implements an innovative educational and psychosocial support after school program for traditionally underserved populations, including orphaned and vulnerable adolescents who are affected by physical abuse, sexual violence, and HIV and AIDS. Stepping Stones International's mission is "to unlock the potential of orphaned and vulnerable adolescents (aged 12–18+) by nurturing their mental, physical, and emotional well-being and creating realizable opportunities for them to become self-sufficient."

While working in partnership with the Department of Social Welfare and Community Development, the chief (*Kgosi*), police, health care providers, and caregivers in Mochudi, SSI offers psychosocial support for survivors of gender-based violence, addresses stigma and discrimination, and conducts gender-based violence outreach sessions. An important component of the program is providing counseling to 100 youth and making home visits to each family. The program also comprises life skills, including self-esteem building, goal setting and planning, communication, HIV and AIDS, relationships and gender identity, alcohol/substance abuse, peer pressure, children's and women's rights, and caring for oneself physically, emotionally, and mentally. Program activities include drama,

art, dance, job skills training, income-generating activities, sports, and tutoring. Stepping Stones International's peer education program, first funded under the U.S. Embassy Botswana Democracy and Governance Project, reaches more than 330 youth in seven districts, engages 35 schools in Botswana, and is currently expanding its outreach to five districts under the Botswana National HIV/AIDS Prevention Support Project funded by the World Bank.

ANNEX 2

INTERVIEW GUIDES

BOTSWANA COUNTRY TEAM

Date:

Name/Title/Affiliation of Respondent:

Contact Information of Respondent:

Interviewer:

INTRODUCTION

As you know, the South-to-South (S2S) technical exchange between Sonke Gender Justice Network (Sonke) and Stepping Stones International (SSI), facilitated by AIDSTAR-One, was an opportunity to utilize the AIDSTAR-One resource *South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit*. The purpose of this Framework and Toolkit is to serve as a guide for PEPFAR country teams to facilitate South-to-South technical assistance for implementation of one or more areas of the PEPFAR Gender Strategy. In addition to the South-to-South technical assistance provided to SSI, we are assessing the usefulness of this tool for other PEPFAR country teams interested in facilitating South-to-South technical exchanges.

In addition to the notes we've taken on the South-to-South technical exchange, we are conducting interviews with you, SSI, and Sonke, to inform the assessment of this Framework and Toolkit. The purpose of the assessment is to reflect on the use of the Framework and Toolkit in facilitating the South-to-South technical exchange in Botswana by identifying what worked well, what did not, and how to improve the process.

This is not a technical assessment of the technical exchange or its outcomes. The assessment report will provide a set of practical recommendations for future use of the Framework and Toolkit in South-to-South technical exchanges. Your input will help other PEPFAR country teams better facilitate these kinds of exchanges.

Thank you for making the time to talk with us today.

The interview consists of 12 questions and will take about one hour.

The draft assessment report will be sent for your review on or about February 15. Will you be able to turn around your comments in one week?

Before we begin, do you have any questions about this interview?

BACKGROUND

1. To what extent were the goals and objectives of the S2S technical exchange achieved?
2. Reflect on how the TA provider and recipient were identified and connected. In what ways did this connection process work well? In what ways could have this connection process worked better? What advice do you have about matching TA providers with TA recipients?

PROCESS

3. Reflecting on how the partners decided on the best approach and methods for providing technical assistance, what worked well and why? What were the challenges and how were they addressed?
4. Reflecting on the planning and implementation phases of the technical exchange.
 - What worked well in the planning phase? What would you do differently in the future?
 - What worked well in the implementation phase? What would you do differently in the future?
 - What plans are in place to follow up with Sonke and SSI after the completion of this AIDSTAR-One activity?

USE OF FRAMEWORK AND TOOLKIT

5. What tools, checklists, or other materials from the AIDSTAR-One Toolkit (e.g., templates for memorandums of understanding, scopes of work) did you use in planning this S2S technical exchange? How were they helpful? What modifications did you need to make?
6. What recommendations do you have for improving the AIDSTAR-One Framework and Toolkit to make it more useful for country teams interested in facilitating a S2S technical exchange?

SUCCESSSES AND CHALLENGES

7. What factors made this technical exchange successful?
8. Looking back on the process, what do you wish had been done differently to make the S2S technical exchange more successful?
9. What particular challenges in facilitating S2S exchanges should a country team be prepared for? How are these different from North-to-South exchanges?

CONCLUSION AND RECOMMENDATIONS

10. What were the benefits of the S2S technical exchange for the country team?
11. What recommendations or insights would you share with country teams interested in facilitating a S2S technical exchange?
12. Is there anything else that you would like to tell me that was not covered in my questions?
Any other comments/insights/questions you would like to share? Do you have any questions for me?

THANK YOU VERY MUCH FOR YOUR TIME AND INSIGHTS.

INTERVIEWER NOTES

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

SONKE GENDER JUSTICE NETWORK

Date:

Name/Title/Affiliation of Respondent:

Contact Information of Respondent:

Interviewer:

INTRODUCTION

Thank you for making the time to talk with us today.

The South-to-South technical exchange between Sonke Gender Justice Network (Sonke) and Stepping Stones International (SSI), facilitated by AIDSTAR-One, was an opportunity to utilize the AIDSTAR-One resource *South-to-South Technical Exchange on Integrating PEPFAR Gender Strategies: Framework and Toolkit*. The purpose of this Framework and Toolkit is to serve as a guide for PEPFAR country teams to facilitate South-to-South technical assistance for implementation of one or more areas of the PEPFAR Gender Strategy. In addition to the South-to-South technical assistance (TA) you provided to SSI, we are assessing the usefulness of this tool for other PEPFAR country teams interested in facilitating South-to-South technical exchanges.

In addition to the notes we've taken on the South-to-South technical exchange, we are conducting interviews with you, SSI, and the Botswana country team to inform the assessment of this Framework and Toolkit. The purpose of the assessment is to reflect on the use of the Framework and Toolkit in facilitating the South-to-South technical exchange in Botswana by identifying what worked well, what did not, and how to improve the process.

This is not a technical assessment of the exchange or its outcomes. The assessment report will provide a set of practical recommendations for future use in South-to-South technical exchanges and of the Framework and Toolkit. Your input will help other PEPFAR country teams better facilitate these kinds of exchanges.

The interview consists of 13 questions and will take about one hour.

The draft assessment report will be sent for your review on or about February 15. Will you be able to turn around your comments in one week?

We would like to record this interview for note-taking purposes only. The recording would only be used to assist us with the notes and wouldn't be distributed or used in any other way. Would that be OK with you?

Before we begin, do you have any questions about this interview?

BACKGROUND

1. To what extent were the objectives of the S2S technical exchange achieved?
2. What specific technical assistance did you provide to SSI?

PROCESS

3. Reflect on how you were connected to SSI. In what ways did this connection process work well? In what ways could have this connection process worked better? What advice do you have about matching TA providers with TA recipients?
4. How did you and SSI decide on the best approach and methods for providing technical assistance? What worked well and why? What were the challenges and how were they addressed?
5. To what extent did the technical exchange follow a phased approach to the planning and implementation?
 - What worked well in the planning phase? What would you do differently in the future?
 - What worked well in the implementation phase? What would you do differently in the future?
 - What plans are in place to follow up with SSI after completion of this AIDSTAR-One activity?

USE OF FRAMEWORK AND TOOLKIT

6. What tools, checklists, or other materials from the AIDSTAR-One S2S Framework and Toolkit (e.g., templates for memorandums of understanding, scopes of work) were useful in this process? How were they helpful? What modifications did you need to make?
7. What recommendations do you have for improving the AIDSTAR-One Framework and Toolkit to make it more useful for other organizations interested in engaging in an S2S technical exchange?

SUCCESSSES AND CHALLENGES

8. What factors enabled you to be successful in this technical exchange?
9. Looking back on the process, what do you wish had been done differently to make the S2S technical exchange more successful?
10. What particular challenges in the S2S exchanges should an organization providing S2S technical assistance be prepared for?

CONCLUSION AND RECOMMENDATIONS

11. What were the benefits of the S2S technical exchange for Sonke?
12. What recommendations or insights would you like to share with organizations looking to collaborate in a S2S technical exchange...
 - as a TA recipient
 - as a TA provider
 - as a facilitator of the S2S TA exchange.

Is there anything else that you would like to tell me that was not covered in my questions? Any other comments/insights/questions you would like to share? Do you have any questions for me?

THANK YOU VERY MUCH FOR YOUR TIME AND INSIGHTS.

INTERVIEWER NOTES

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

STEPPING STONES INTERNATIONAL

Date:

Name/Title/Affiliation of Respondent:

Contact Information of Respondent:

Interviewer:

INTRODUCTION

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Before we begin, do you have any questions about this interview?

BACKGROUND

1. To what extent were the objectives of the S2S technical exchange achieved?
2. What specific technical assistance (TA) did you receive or participate in as part of this AIDSTAR-One activity?

PROCESS

3. Reflect on how you were connected to Sonke. In what ways did this connection process work well? In what ways could have this connection process worked better? What advice do you have about matching TA providers with TA recipients?
4. How did you and Sonke decide on the best approach and methods for providing technical assistance? What worked well and why? What were the challenges and how were they addressed?
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 - What worked well in the planning phase? What would you do differently in the future?
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 - What plans are in place to follow up with Sonke after completion of this AIDSTAR-One activity?

USE OF FRAMEWORK AND TOOLKIT

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CONCLUSION AND RECOMMENDATIONS

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INTERVIEWER NOTES

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

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

AIDSTAR-One

John Snow, Inc.

1616 Fort Myer Drive, 16th Floor

Arlington, VA 22209 USA

Phone: 703-528-7474

Fax: 703-528-7480

Email: info@aidstar-one.com

Internet: aidstar-one.com