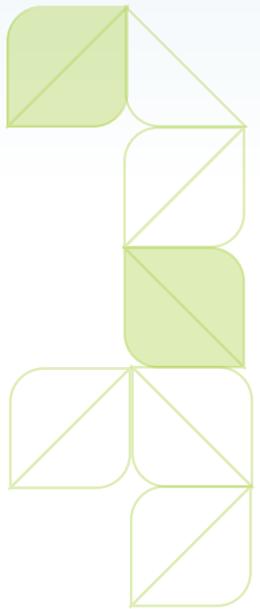




# South -to- South

*mentoring toolkit  
for key populations*



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## **Thanks to All!**

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# Contents

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<b>Abbreviations .....</b>	<b>1</b>
<b>Glossary .....</b>	<b>2</b>
<b>Welcome .....</b>	<b>3</b>
About LINKAGES .....	4
About the Development of this Toolkit.....	4
How to Use the Toolkit .....	5
<b>Snapshot of the S2S Mentoring Toolkit .....</b>	<b>6</b>
<b>What Is South-to-South Mentoring among Key Populations?.....</b>	<b>7</b>
What Is South-to-South Mentoring? Who Are the Actors? .....	7
Who Are Key Populations? .....	9
Are There Special Considerations in Working with Key Populations?.....	10
What Are the Risks and Benefits of South-to-South Mentoring?.....	12
How Does Mentoring Differ from Technical Assistance or Coaching? .....	15
Does Learning Always Flow in One Direction? .....	15
Are There Different Types of South-to-South Mentoring? .....	16
How Can South-to-South Organizational Mentoring Be Funded? .....	18
<b>South-to-South Organizational Mentoring Approaches .....</b>	<b>19</b>
On-Site Mentoring .....	19
Twinning.....	23
Community of Practice .....	24
Study Tours and Site Visits .....	25
Exchange Visits.....	25
Internships and Shadowing.....	26
Resource Referral .....	27
Telementoring .....	28
Exchange Events .....	30
<b>Preparing for Mentoring .....</b>	<b>33</b>
Skills of Successful Mentors.....	33
Mentees: Identify Priority Needs and Interests.....	34

**SOUTH-TO-SOUTH MENTORING TOOLKIT**

- Mentors: Inventory Your Assets and Expertise .....34
- Create an Internal Organizational Mentoring Management Plan.....34
- The Mentoring Process ..... 35**
- Step 1: Build the Mentoring Relationship ..... 37**
- Initial Meetings .....37
- Build Trust.....38
- Step 2: Identify Expectations and Approaches ..... 40**
- Conduct Capacity Assessments and Develop Learning Objectives .....40
- Choose Mentoring Approaches to Plan Interactions .....42
- Step 3: Manage the Mentoring Process ..... 44**
- Maintaining Contact .....45
- Practical Challenges and Tips.....45
- Step 4: Monitor the Relationship ..... 50**
- Recognize Progress .....51
- Step 5: End the Relationship ..... 52**
- Closure.....52
- Transitioning the Relationship .....53
- Ending the Relationship Prematurely .....54
- Annex 1: Resources..... 55**
- Resources by and for Key Populations .....55
- Partnership and Mentoring Resources .....57
- Knowledge Exchange Resources .....57
- Annex 2: Orientation Meeting Discussion Guide ..... 58**
- Instructions.....58
- Get to Know Each Other .....58
- Identify Areas for Mentoring .....58
- Establish Operational Guidelines .....59
- Confirm Next Steps .....59
- Annex 3: Mentoring Plan Template ..... 60**
- Instructions.....60
- Mentoring Implementation Plan.....62
- Annex 4: Mentoring Summary Report..... 63**
- Instructions.....63
- Annex 5: Mentor’s Quarterly Report ..... 64**
- Mentor’s Report.....64
- Annex 6: Mentorship Reflection Questionnaire ..... 67**
- Instructions.....67
- Annex 7: Mentorship Evaluation Form ..... 75**
- Instructions.....75

# Abbreviations

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<b>CIPAC</b>	Centro de Investigación y Promoción para America Central de Derechos Humanos
<b>CSO</b>	civil society organization
<b>CV</b>	curriculum vitae
<b>DIC</b>	drop-in center
<b>HR</b>	human resources
<b>IT</b>	information technology
<b>ITOCA</b>	integrated technical and organizational assessment
<b>JICA</b>	Japan International Cooperation Agency
<b>KP</b>	key population
<b>KPO</b>	key population organization
<b>KSA</b>	knowledge, skills, and attitudes
<b>LINKAGES</b>	Linkages across the Continuum of HIV Services for Key Populations Affected by HIV
<b>MSM</b>	men who have sex with men
<b>MSMGF</b>	Global Forum on MSM & HIV
<b>NGO</b>	nongovernmental organization
<b>PEPFAR</b>	U.S. President’s Emergency Plan for AIDS Relief
<b>PSI</b>	Population Services International
<b>PWID</b>	people who inject drugs
<b>S2S</b>	South to South
<b>SBCC</b>	social and behavior change communications
<b>STI</b>	sexually transmitted infection
<b>SW</b>	sex worker
<b>SWING</b>	Service Workers In Group
<b>TA</b>	technical assistance
<b>TG</b>	transgender person
<b>UNODC</b>	United Nations Office on Drugs and Crime
<b>USAID</b>	United States Agency for International Development

# Glossary

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**Key Populations:** Population groups who are at increased risk for acquiring HIV infection because they are among those most likely to be exposed to and affected by HIV. For the purpose of this toolkit, key populations comprise sex workers (SWs), men who have sex with men (MSM), people who inject drugs (PWID), and transgender people (TG).

**Local Organization:** An organization belonging to the country in which that organization is working. For the purposes of this toolkit, the term follows USAID's definition.

- Local organizations are not controlled by a foreign entity or by an individual or individuals who are not citizens or permanent residents of the recipient country.
- Local organizations are organized under the laws of the recipient country.
- Local organizations' principal place of business is the recipient country.
- Majority ownership comprises citizens or lawful permanent residents of the recipient country, or management is by a governing body whose majority comprises citizens or lawful permanent residents of the recipient country.

**Mentoring:** A long-term process through which skills, knowledge, and expertise are transferred from one individual, organization, or network to another for the purpose of improving organizational performance in pursuit of a clearly defined mission.

**South to South:** The exchange of resources, technology, and knowledge among entities that are rooted in or have direct experience operating in complex environments in low- and middle-income countries (i.e., the global South).

**South-to-South Mentoring:** A mentoring approach in which skills, knowledge, and expertise are shared by a mentor with mentees, where all parties come from the global South and have direct experience operating in low- and middle-income countries.

# Welcome

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Welcome to the *South-to-South Mentoring Toolkit*.

Although much knowledge has been transferred from the global South to the global South (S2S) and numerous guides have been produced about mentoring, few tools exist to guide mentors in how to best conduct S2S mentoring. In S2S mentoring, all organizations involved, including the mentors and mentees, are rooted in the global South and have direct experience operating in complex environments in low- and middle-income countries. Mentoring can be provided more regularly and more efficiently by organizations in the same or neighboring countries and is often more readily accepted when the mentor's messages, approaches, experiences, and lessons learned come from a setting similar to that of the mentee's.

Many organizations in the global South partner with one another to share experiences, either as a component of international development programs or on their own initiative. Although hugely successful, these initiatives are frequently implemented without guidance, preparation, or structure and thus miss opportunities for even greater success—including greater and more sustainable learning. S2S exchanges are particularly valuable for organizations working with key populations—that is, sex workers of all genders, men who have sex with men, people who inject drugs, and transgender people—because the exchanges can help increase these marginalized communities' agency (i.e., the ability to act on behalf of that which they value) and thus empower them.

LINKAGES designed this toolkit to support and guide existing mentors from key-population-led organizations (KPOs) in the global South to enhance the quality of mentoring support available to other KPOs in the global South. Specifically, this toolkit aims to support mentors in the global South to understand what S2S mentoring is, their role in S2S mentoring, different S2S mentoring approaches and how to choose among them, and the technical skills needed to mentor effectively.

## Three Ways This Toolkit Is Unique

First, it **focuses on organizational mentoring**, as opposed to individual mentoring. Individuals come and go, whereas strong organizations produce a more sustainable response. This approach is much more complex than individual mentoring and needs more careful coordination.

Second, it **emphasizes S2S mentoring**. S2S mentoring acknowledges that expertise exists in the global South and that S2S mentoring can be provided more regularly and more efficiently than traditional North-to-South mentoring. Also, by placing the mentoring relationship between organizations that have similar context and challenges, the knowledge transfer is likely to be more relevant.

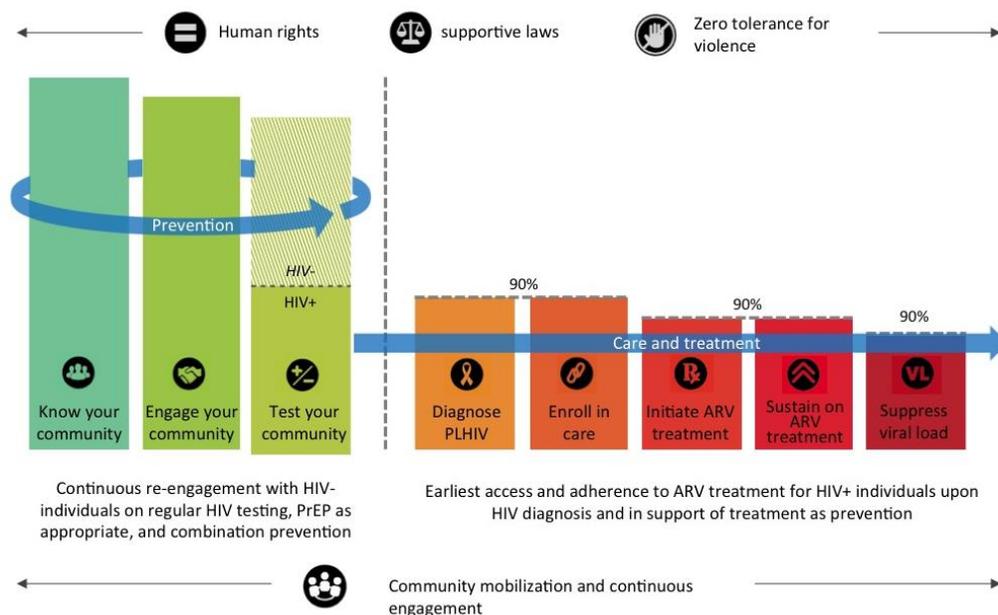
Third, it **concentrates on supporting key populations**. S2S exchanges are particularly valuable for organizations working with key populations, because the exchanges empower these communities, which often face the additional challenges of stigma, isolation, and criminalization.

This toolkit aims to guide mentoring practitioners both within the LINKAGES project and beyond. It also provides best practices in enabling local KPOs that are already engaged in mentoring to more effectively manage, conduct, and monitor mentoring activities.

## About LINKAGES

LINKAGES is a five-year cooperative agreement funded by USAID under PEPFAR and implemented by FHI 360 in partnership with Pact, IntraHealth International, and the University of North Carolina at Chapel Hill. LINKAGES conducts a range of activities to reduce HIV transmission among key populations and to improve their enrollment and retention in care across the HIV cascade. A key goal of LINKAGES is to accelerate program learning and performance among KPOs through S2S technical assistance (TA) and mentoring. LINKAGES is drafting this toolkit to facilitate S2S learning as a way of strengthening technical competencies among key populations and to increase service uptake along the HIV prevention, care, and treatment cascade.

### HIV Prevention, Care, and Treatment Cascade



## About the Development of this Toolkit

This toolkit was drafted by LINKAGES with the help of Pact's Capacity Development team. Subsequently, at a joint two-day meeting of staff from LINKAGES, as well as project partners with experience in mentoring, feedback on the draft was reviewed and innovative tools and useful best practices were suggested as additions. The new draft was evaluated for relevance and accuracy by members of the LINKAGES Advisory Board and was field tested in Africa.

## How to Use the Toolkit

Practitioners may use the toolkit in a variety of ways.

- Follow the step-by-step guidance as you move through the mentoring process, from establishing relationships with future mentees, to choosing the right mentoring approach for a particular context, to ending the relationship.
- Use the resource section to help you plan for, structure, and implement mentoring interventions.

LINKAGES recognizes that to be successful, mentoring needs to be flexible and respond to participants' needs as well as to the experience and skills they bring to the process. Thus, the steps outlined in these pages are meant as guidelines only. Expectations and approaches should be reevaluated throughout the mentoring process and tailored to the specific needs of a given context and set of counterparts.

# Snapshot of the S2S Mentoring Toolkit

## TARGET AUDIENCE

This toolkit is for KPOs that have mentoring experience and are interested in implementing or expanding S2S mentoring.

## COMPETENCIES

The *South-to-South Mentoring Toolkit* is designed to help participants:

- Understand how S2S mentoring is a relevant approach to working with key populations, as distinct from other approaches, such as TA
- Access mentoring tools, approaches, and templates that have been field-tested by practitioners

## PRACTITIONER SKILL DEVELOPMENT

This module seeks to help mentors develop competency to:

- Identify the five steps of mentoring and the skills and activities that are necessary for each
- Choose the most relevant mentoring intervention, based on the needs and expectations of the mentee

## USEFUL TOOLS AND TABLES IN THIS TOOLKIT

- |  |         |
|--|---------|
| ▪ Mentor and Mentee Rights and Responsibilities        | page 9  |
| ▪ Summary of Mentoring Approaches and When to Use Them | page 20 |
| ▪ Mentoring Approach Decision-Making Matrix            | page 40 |
| ▪ Practical Challenges and Tips                        | page 45 |

# What Is South-to-South Mentoring among Key Populations?

S2S mentoring is a form of peer learning where both mentor and mentees are rooted in the global South and have direct experience operating in low- and middle-income countries. S2S mentoring among KPOs is an effective approach, given that approaches are tailored to the needs of key populations and therefore are more likely to be nonstigmatizing and relevant to the varied legal and sociocultural barriers facing key populations. This section gives an overview of S2S mentoring and answers basic questions about the approach.

## What Is South-to-South Mentoring?

### Who Are the Actors?

Mentoring is a long-term process through which skills, knowledge, and expertise are transferred from one organization or network to another for the purpose of improving organizational performance in pursuit of a clearly defined mission. The main feature of mentoring is a trusting, comfortable relationship between mentor and mentee. Such trust is especially important for key populations, who are often stigmatized, marginalized, and exposed to verbal, physical, and sexual violence just for being who they are. Trust is therefore an absolute priority, even more than technical excellence and diverse experience.

### What Is South-to-South Mentoring?

A mentoring approach in which skills, knowledge, and expertise are shared by a mentor with mentees, where all parties come from the global South and have direct experience operating in low- and middle-income countries.

In S2S mentoring, all organizations involved, both mentor and mentee, are local and rooted in the global South. All participating organizations are either led by key populations themselves or have direct experience working to support key populations. In this toolkit, the focus is on these organizations as key actors in the HIV response. In most cases, the individual KPO will work with another organization focused on the same key population (peer to peer); crossover among key population groups is facilitated only when the benefits are clear.

S2S mentoring gained significant attention after the Accra Agenda for Action (2008), which explicitly highlights the importance of S2S approaches to effective development efforts

### Why South-to-South Mentoring Works

- ❑ Knowledge transferred is often more relevant than North-to-South mentoring.
- ❑ S2S mentoring is cost-effective compared to North-to-South mentoring.
- ❑ It empowers and builds agency of both mentor and mentee.
- ❑ It values global diversity and global South expertise.

and focuses on the principles of equality among partners, as well as cultural diversity and identity and local content of S2S mentoring. S2S mentoring “plays an important role in international development cooperation and is a valuable complement to North–South cooperation.”<sup>1</sup> This concept was reinforced at the 2014 International AIDS Conference, where a prevailing theme was “Nothing about us without us,” emphasizing key populations’ critical role in identifying, developing, and implementing development solutions.

It is important to note that organizations from industrialized areas of the North have much to learn from their Southern counterparts. This type of exchange takes place often; a case study is included in this toolkit. However, since this manual is hoping to contribute to a new mode of learning and organizational interaction, the main focus remains on South-to-South engagement as distinct from North-to-South capacity development and TA, which has been the norm for decades.

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<sup>1</sup> Accra Agenda for Action, promulgated at Third High Level Forum on Aid Effectiveness, September 2–4, 2008, Accra, Ghana, (Washington, DC: World Bank: 2008), para 19(e), <http://siteresources.worldbank.org/ACCRAEXT/Resources/4700790-1217425866038/AAA-4-SEPTEMBER-FINAL-16h00.pdf>.

In S2S mentoring, mentees and mentors both have rights and responsibilities, which are outlined in the table below.

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**MENTOR AND MENTEE RIGHTS AND RESPONSIBILITIES**

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**MENTEE RIGHTS**

- You have the right to expect your mentor to be knowledgeable in the field of study.
- You have the right to expect the mentor to be professional and prepared to mentor during meetings.
- You have the right to feel safe and comfortable with the mentor.
- You have the right to decline to work with any mentor with whom you feel uncomfortable.
- You have the right not to be judged or made to feel inadequate.
- You have the right to expect confidentiality, recognizing that mentors are part of the LINKAGES team and may be expected to share some information with the project.

**MENTEE RESPONSIBILITIES**

- You are expected to be an active learner.
- You are expected to come prepared to meetings with questions and challenges for which you would like assistance.
- You are expected to gain technical or organizational benefit from the relationship, accepting or adapting mentoring advice that is appropriate for your organization.
- You are expected to supply feedback to LINKAGES about your experiences, both negative and positive.

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**MENTOR RIGHTS**

- You have the right to be treated with respect.
- You have the right to arrange mentoring support at times that fit with your other professional and personal responsibilities.
- You have the right to receive sufficient training, support, and resources to play your role well.
- You are not expected to do a mentee's work but only to suggest options and resources and to assist in solving problems for which mentees will implement solutions on their own.
- You have the right to decline to work with any mentee with whom you feel uncomfortable.
- You have the right to refuse to do any work that is unethical or inappropriate.

**MENTOR RESPONSIBILITIES**

- You are expected to be knowledgeable about your specialty.
  - You are expected to be prepared for meetings or conversations.
  - You are expected to conduct yourself in a professional manner at all times, and to be respectful, patient, and attentive to your mentees' needs.
  - You are expected to respect all mentees' confidentiality, recognizing that as a member of the LINKAGES team, you may share information with the project team as appropriate.
  - You are expected to provide feedback on your experiences, positive and negative, to LINKAGES staff.
- 

## **Who Are Key Populations?**

Although LINKAGES respects that each individual key population community defines itself in its own way, this toolkit describes key populations as population groups that are at increased risk for acquiring HIV infection, because they are among those most likely to be exposed to and affected by HIV. Key populations include female, male, and transgender sex workers; men who have sex with men; people who inject drugs; and transgender people. Reducing HIV incidence in these

populations is complex. Risk behaviors are overlapping, and legal and sociocultural barriers are formidable. Because key population sexual and drug-use behaviors are illegal and stigmatized in most societies, individuals are also often marginalized and experience extreme discrimination. Fearing discrimination and possible legal consequences, many key populations hesitate to come forward for HIV-related services.

Key populations are not homogenous. Some have overlapping risk (e.g., sex workers who inject drugs, or transgender sex workers) and/or are living with HIV, and thus experience multiple layers of stigma, discrimination and marginalization. Young people from key populations may experience greater stigma, discrimination, and violence than their older peers, and policy and legal barriers related to legal age of consent often bar their access to health services. Young key populations may thus be more vulnerable to HIV than their older peers.<sup>2</sup> It is important to work within and across key populations and to encourage cross-learning where appropriate to avoid isolation, which discourages the sharing of lessons and experiences.

### South-to-South Mentoring As a Game Changer

A gay doctor in Southern Africa recently reflected on the difference a mentor would have made when he was starting out and trying to establish an organization to support his MSM community. He was searching for trusted information on existing models, networks, champions, or funders from sources who understood his community's unique needs and aspirations.

Had he had a mentor from an MSM organization then, he would have had even more agency and his efforts would have progressed much more quickly and effectively.

Technical competency and capacity development approaches must be carefully targeted to address the structural, behavioral, and biomedical issues that affect key populations; to increase service uptake along the HIV prevention, care, and treatment continuum; and to strengthen the capacity and agency of KPOs and networks to increase and sustain availability of and demand for HIV services.

### Are There Special Considerations in Working with Key Populations?

S2S mentoring must remain flexible, responsive, and adaptable to the changing needs of KPOs. Keep the following issues in mind when working with key populations.

## COMMUNITY EMPOWERMENT

S2S mentoring is particularly relevant to key populations because it can play an important role in empowering communities and strengthening mentees' agency, especially for key populations. Community empowerment is "a collective process that enables key populations to address the structural constraints to health, human rights, and well-being; to make social, economic, and behavioral changes; and to improve access to health services."<sup>3</sup> Community empowerment is critical to improving the health and well-being of key populations and important to supporting services and facilities led by organizations of people from key populations. Because S2S

<sup>2</sup> *Consolidated Guidelines on HIV Prevention, Diagnosis, Treatment, and Care for Key Populations* (Geneva: World Health Organization, July 2014), [http://apps.who.int/iris/bitstream/10665/128048/1/9789241507431\\_eng.pdf?ua=1&ua=1](http://apps.who.int/iris/bitstream/10665/128048/1/9789241507431_eng.pdf?ua=1&ua=1).

<sup>3</sup> *Consolidated Guidelines*, 100.

mentoring, as defined in this toolkit, is rooted in the global South, it is about both strengthening the agency of the key population mentee and empowering the key population mentor organization to be a leader in key population programming, mentoring, and TA.

### LEGAL BARRIERS

Laws, regulations, and policies can serve as barriers to effective service provision and uptake by key populations. When providing S2S mentoring, particularly in another country, it is important to be aware of legal barriers and how these affect the mentee organization and the key populations the mentee organization is supporting.

### STIGMA AND DISCRIMINATION

Stigma and discrimination against key populations are common, and stigma in health facilities and by law enforcement services can serve as a significant barrier to key populations' access to services. It is important to understand how stigma is manifest in the context in which the mentee organization is operating. S2S mentoring, which focuses on key population empowerment and agency as well as on developing key population communities, is also important for reducing self-stigma. S2S mentors should seek to identify and build on assets that exist, rather than to fill problems or gaps.

### VIOLENCE, SAFETY, AND SECURITY

Violence against key populations is common and can be physical, sexual, or psychological. Key populations may experience violence and harassment from their sexual or domestic partners, sex work clients, law enforcement, community members, and even family members. In preparing any mentoring activity (e.g., a study tour, site visit, or community of practice), it is essential to ensure participants' safety and security. Consider consulting with and/or sensitizing law enforcement officials before proceeding with a highly visible mentoring activity.

### LANGUAGE

Many terms commonly used to describe key populations are derogatory or outdated. When speaking with and about these populations, adopt the terms that your mentees prefer and that carry no judgmental overtones.

### AVAILABLE ACCESS

Many key populations, particularly sex workers, are very mobile, and support must be responsive and adaptive. Flexibility and patience are required.

*For additional resources relating to key populations, see Annex 1.*

### *Case Story: The Power of Mentoring for Key Populations Asia, Africa, and the Sex Worker Academy*

Could sex-worker-led organizations in Africa benefit from the gains in India and learn to influence service, policies, and programming? This question led the Global Network of Sex Work Projects (NSWP) to facilitate S2S exchanges that turned out to be quite a bit different than first envisioned.

NSWP originally organized four country teams from Botswana, Kenya, Uganda, and Zimbabwe to travel in 2012 to sex-worker-led training programs in India at Ashodaya Samithi, in Mysore, and Veshya Anyay Mukti Parishad (VAMP), in Sangli. The visits exposed the teams to two very different approaches to policy advocacy—one with a clinical service delivery orientation and the other using community development and community mobilization techniques.

The teams found they had absorbed very different lessons and wanted to learn from their combined experience. In 2013, the regional network African Sex Workers Alliance (ASWA) requested NSWP support for the development of the Sex Worker Academy Africa, to establish a pan-African resource with a standard curriculum for passing on the combined approaches. NSWP and ASWA boards agreed, locating the academy in Kenya, hosted by Kenya Sex Worker Alliance (KESWA). Thus, a much larger initiative began.

Throughout 2013, the Indian groups worked with KESWA and ASWA to design the concept and develop the curriculum. The development of the academy included exchange visits between India and Kenya, during which six Kenyan sex workers were selected and trained as SWAA faculty members. In July 2014, the first seven-day academy was piloted in Kenya, open to Kenyan female, male, and transgender sex workers with a desire to build and strengthen the African sex worker rights movement and sex-worker-led organizations in Africa. Two subsequent academies included country teams from Tanzania, Zimbabwe, Nigeria, and the Democratic Republic of Congo. Ashodaya Academy and VAMP Institute provided technical assistance during the first two pilots; the academy leadership is now under KESWA.

The Sex Worker Academy now has 48 graduates—half from Kenya and the remaining from the other four African countries. Promising new graduates are invited to shadow current faculty members to prepare to lead in the future as part of the faculty. The faculty lead the program four times a year, depending on funding. The curriculum is continually being adapted to suit the African context and to meet the needs of the sex worker community there.

As sex workers go through the program, ASWA and NSWP are seeing a growing sense of achievement, ownership, and empowerment, which in turn is influencing other areas of activity and enabling them to meaningfully participate in advocacy on sex worker programming—whether about condom promotion or in international policy forums. The collaboration continues across the continents, although formal mentorship has ended.

NSWP learned several key lessons from this initiative. First and foremost is flexibility. As the original idea evolved and changed, both NSWP and the Indian organizations remained responsive to expressed needs. Second, the role of expert was continually challenged. The sex workers were given space to identify their own needs and then to play the lead role in developing the program for their own community. For a group that is often abused and stigmatized, the process nurtured participants' belief in their own abilities. Third, contextualizing and adapting is vital. Sex work and sex workers are significantly different from one continent to another; taking the initial lessons from India and making the curriculum fully African was critical.

## What Are the Risks and Benefits of South-to-South Mentoring?

Through S2S mentoring, mentees benefit by receiving support, knowledge, and skills that are directly relevant to their experience, missions, and context. Mentor organizations benefit by sharpening their own knowledge and skills as they share with others. By being a mentor, organizations are also able to receive recognition for the level of excellence they have achieved. Additionally, mentor organizations have the opportunity to help other organizations and strengthen the network of similar organizations working toward the same goal.

Although there are many benefits, S2S mentoring also involves potential risks. First, it is not enough to bring together two or more local organizations and assume that learning exchange will occur. S2S organization-to-organization mentoring is relatively new and may be unfamiliar to many key population groups. It is critical that local actors be supported to set clear expectations for both the process and results of the exchange. The local actors must hold each other accountable for meeting expectations.

Second, it is often assumed that local organizations with strong capacity in one area will be strong at imparting expertise to other organizations. In fact, this is rarely so. Local organizations often need support to effectively share skills and knowledge and to stimulate learning in others.

Third, strong local organizations are often stretched to complete essential advocacy work and programmatic activities for donors, so it is important to ensure that both mentor and mentee will benefit from S2S mentoring. S2S mentoring is most powerful when it focuses on issues that are timely, relevant, concrete, and strategic for all parties.

### Benefits of Mentoring

A mentor of a project describes what he gained from this work:

*In the beginning, I didn't have much experience or many skills. Technical staff helped me to plan and do clinical mentoring. Now I feel confident to conduct mentoring trips alone. I feel so much happiness that I can develop my career and make a contribution to Vietnam's methadone maintenance therapy scale-up.*

## S2S Mentoring Principles

These key principles underpin S2S mentoring.

**Partnership:** Trust-based relationships among participants ensure that S2S mentoring achieves mutually agreed-upon results.

**Quality:** High-quality approaches are offered by the mentor to improve performance, develop appropriate local solutions, enhance impact, and achieve development goals. Approaches are researched, tested, documented, packaged, and coupled with staff training for effective scale-up.

**Customized learning:** S2S mentoring is a process of reflecting on interventions to respond better to organizational challenges. It is tailored to KPOs specific contextual values and opportunities.

**Ownership:** S2S mentoring can be successful only when participating KPOs fully own both the goals and the process. Mentors and mentees share full responsibility for tracking and understanding results.

**Contribution:** Every participant organization has something to learn and something to share. The S2S mentoring process maximizes the contribution of each participant.

**Rights-based:** Given the legal barriers, stigma, discrimination, and violence that key populations experience, integrating human rights principles into S2S mentoring is critical. This means creating a safe environment and not limiting participation.

## How Does Mentoring Differ from Technical Assistance or Coaching?

Mentoring is closely related to coaching and TA. However, the latter two approaches are more task-focused, based on specific needs and on objectives that must be met. Although TA may be delivered in a mentoring style, it is still designed to meet specific project objectives. In TA, needs are often set externally, as by a job requirement or for project compliance. A project may have specific technical or capacity development objectives it seeks to accomplish over its life. The project implementer provides local partners with TA to achieve these objectives—whether training the KPO to do community mobilizing or to change policy or by assisting them to train doctors on correct prescriptions for naloxone overdose treatment.

While mentoring also has clear objectives, the approach is much more process-oriented and responds to the needs and initiative of the mentee. Mentees set the learning agenda based on their priority capacity development needs. The peer relationship between mentor and mentee puts the two on more equal footing than they would be in the context of TA provision. While TA is confined to the scope and timeframe of a project, mentoring has the possibility of continuing in the long term if the two organizations find value in the relationship and wish to continue on their own.

Mentoring is more flexible in its focus and customized to the mentee's needs; it is able to adapt and change course over time as the mentee's needs evolve. An international organization may support the process within a specific project, but the organization is neither mentor nor mentee and merely facilitates the process so that Southern partners can find and work with one another. An example is the LINKAGES support of its partners via this toolkit.

If a mentor has been providing TA to others on a regular basis, it can be difficult to transition from TA provider (where there is a clear idea of the model to follow or standards a mentee should achieve) to a mentor. The role of TA provider might be a strong “comfort zone” for a professional organization.

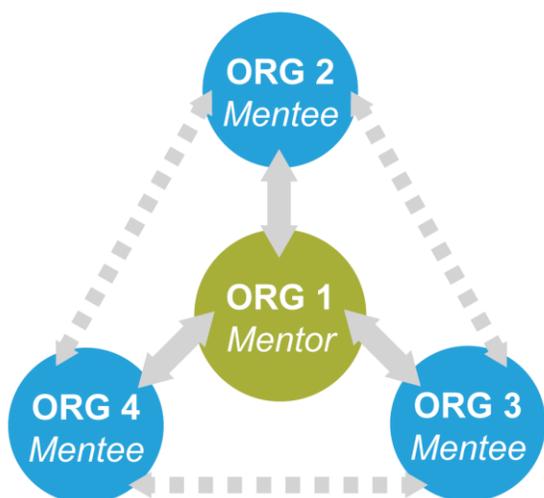
## Does Learning Always Flow in One Direction?

Are there always clear mentors and mentees? No and no. In many cases, mentors and mentees learn significant lessons from one another. The roles and flow of information may change, depending on the topic or circumstances. Many times, organizations develop a peer-to-peer relationship, with each learning from the other. According to the S2S principle of *contribution*, every participant organization has something to learn and something to share. The S2S mentoring process maximizes the contribution of each participant.

## Are There Different Types of South-to-South Mentoring?

Although S2S mentoring can take many forms, this toolkit focuses specifically on two types:

- **One-to-one mentoring:** Involves a mentor organization working directly with a single mentee to strengthen the capacity of its organization.
- **One-to-many mentoring:** Involves a mentor organization operating as a facilitator of knowledge and skills exchange among multiple mentee organizations.



*Flow of Knowledge in One-to-Many Mentoring*



*Flow of Knowledge in One-to-One Mentoring*

The roles of mentor and mentee differ depending on whether the mentoring is provided by one-to-one or one-to-many.

In one-to-one mentoring, mentor/mentee roles are more traditional, with the mentor focused on mentoring the mentee or identifying other resources to respond to the mentee's needs. In one-to-many mentoring, roles are more complex; in addition to mentoring mentees, the mentor organization also facilitates knowledge and skills exchange between two or more mentees.

Furthermore, in a one-to-many scenario, mentees may be asked to act as mentors, sharing their skills and knowledge with other mentees. Although it may seem that one-to-many mentoring is more time consuming, resources are saved by using fewer mentors and the peer engagement may foster better outcomes.

MENTORS' AND MENTEES' ROLES BY MENTORING SCENARIO

		ROLE IN ONE-TO-ONE	ROLE IN ONE-TO-MANY
<b>MENTORS</b>	Supporting mentees to articulate goals and create a plan for developing their capacity that meets all needs		
	Building trust with mentees		
	Assisting mentees to articulate their strengths and challenges		
	Brokering new relationships for mentees		
	Tracking adoption of new skills and knowledge in mentees		
	Identifying areas in which they feel capable of acting as mentors	Identifying mentees and external actors who have the knowledge and skills to support capacity development	
	Identifying other organizations that can meet the needs of mentees when mentors are unable to do so themselves	Arranging logistics for learning exchanges, study tours, etc.	
	Visiting mentees (or hosting visits by mentees) and supporting their learning	Facilitating events that support knowledge exchange among mentees	
	Connecting virtually with the mentees between face-to-face meetings	Supporting mentees' virtual knowledge sharing by assimilating and curating content	
	<b>MENTEES</b>	Identifying areas of strength and needs	
Offering critical feedback and suggestions			
Articulating goals and preferred ways of working with the mentor and with other group members			
Developing a plan for capacity development—individual and/or group			
Taking the time to practice and embed new skills and practices within the organization			
Tracking the adoption of new skills and knowledge within the organization and the group			
Participating actively in virtual and face-to-face mentoring opportunities		Learning from and exchanging knowledge with other mentees	
		Teaching and sharing organizational strengths with other mentees	
		Networking with external actors brought in by the mentor	
		Engaging with other mentees in the group and building trust among each other	

## How Can South-to-South Organizational Mentoring Be Funded?

The concept of organizational mentoring is new to much of the development world. Therefore, there are not many donors funding this activity specifically. However, there are ways to support this important process.

S2S mentoring is both less costly and more effective than many forms of TA, including expert consultancies. Because participants are often from the same region, any travel that might be involved is less expensive than bringing in people from afar. Additionally, on-site mentoring visits are usually supplemented by interactions via e-mail, telephone, or Skype, and these activities cost very little, if anything. S2S mentoring is also considered more effective than many other approaches because the peer-to-peer engagement can take place at a pace and scale that is appropriate to the mentee's capacity to absorb new ideas. The ongoing nature of the relationship helps mentees gain support for their efforts to apply new ideas and to identify and resolve challenges.

Consequently, S2S mentoring can be incorporated into other donor projects, particularly projects of donors that show interest in strengthening the effectiveness and sustainability of the KPO as a whole, not simply its project activities. The case for the value of capacity strengthening for an entire KPO can be made in donor proposals, and S2S mentoring can be integrated into the project budget, implementation, and monitoring portions of a proposal.

Inability to locate funding for S2S mentoring does not necessarily negate the opportunity for mentoring to occur. Many peer mentoring relationships continue based solely on the initiative and support of the participants. Because of the potential low costs noted above, ongoing mentoring can often be supported through resources already available. Some of the mentoring approaches listed in this toolkit take little to no funding (e.g., via telementoring or resource referral). There are other ways to leverage existing resources for mentoring as well. For example, if one organization expects to travel to or near the other's office, a meeting might be added on. Or if mentor and mentee are both attending the same meeting, they might have a dinner together to catch up or discuss issues.

### Examples of Mentoring Costs to Include in a Project Proposal

#### Training

- Training S2S mentors

#### Mentoring Activities

- Travel/accommodation and per diem costs of mentors and/or mentees
- Travel costs for site visits (van rental, etc.)
- Venue rental for larger mentoring activities such as communities of practice
- Workshop supplies and catering (lunch and coffee/tea during workshops)

# South-to-South Organizational Mentoring Approaches

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A wide variety of mentoring approaches can be used to support S2S mentoring across organizations. Participants should select the appropriate approach based on mentorship needs and the time and financial resources available to support learning.

## On-Site Mentoring

Mentoring on site at the mentee's office or other meeting location is a common approach to organizational mentoring. It is easier for mentees to integrate new skills and practices into an organizational routine when they can be put to use immediately. In addition, mentees may be more comfortable in their own environment and are likely to introduce appropriate staff members into the mentoring process. For mentors, there are likely to be fewer distractions, and being on site makes it easier to tailor support to mentees' needs. (It should be noted however that mentees may experience more distractions at their own workplace). For monitoring over time, mentors can see firsthand how the new skills are being integrated.

This approach differs from internships or shadowing in that it is about sharing or demonstrating the way things are done within the mentee's organization.

### PLANNING AND IMPLEMENTATION STEPS FOR ON-SITE MENTORING

- Start planning well in advance to ensure availability of key participants.
- Outline goals and expectations before the visit, in collaboration with the mentee.
- Develop a tentative agenda, keeping in mind that things are likely to change.
- Upon arrival, start with an orientation/planning session for everyone involved.
- During implementation, ensure that the mentor has dedicated staff to work with.
- Minimize distractions.
- Hold frequent check-ins and debriefs with the whole team.
- Wrap up the visit by creating a clear list of follow-up items and responsible parties.
- Follow up regularly, and provide support via phone, e-mail, and Skype to monitor, clarify, or troubleshoot.

SUMMARY OF MENTORING APPROACHES AND WHEN TO USE THEM

S2S MENTORING APPROACHS	DEFINITION	WHEN TO USE	CAN IT BE DONE VIRTUALLY?	MENTORING SCENARIO
<b>ON-SITE MENTORING</b>	An approach where the mentor organization is supporting the mentee organization’s learning face to face at the organization’s office or site.	<ul style="list-style-type: none"> <li>• The need for learning is complex enough that it cannot be completed independently or with distant support, and/or requires long-term engagement.</li> <li>• The mentee has clearly defined a set of needs that the mentor can help address.</li> <li>• Both mentor and mentee have the time and the people power to dedicate to collaborative work during the mentor’s visit and to follow through after the face-to-face interaction ends.</li> <li>• Mentor and mentee are co-located or are based relatively close to one another. (This helps minimize costs.) Where resources and time are available, appropriate mentors can travel to mentee sites from a distance.</li> </ul>	No, but on-site mentoring can be integrated with virtual mentoring as part of a comprehensive mentoring plan.	One to one
<b>TWINNING</b>	An approach where a mentor pairs up to two mentee organizations into a long-term relationship for facilitated exchange and mutual capacity strengthening.	<ul style="list-style-type: none"> <li>• There is a good cultural and programmatic fit between the mentees.</li> <li>• Mentees can articulate their shared interests.</li> <li>• Each organization has something to offer to the other.</li> <li>• Geography is not a barrier—the organizations are either closely located or have access to good communications technology.</li> <li>• Both organizations are committed to a longer-term engagement.</li> </ul>	Yes, but it is helpful if organizations’ members have opportunities to meet face to face. More interactive collaboration requires a strong Internet connection.	One to many
<b>COMMUNITY OF PRACTICE (COP)</b>	An approach where a group of mentees with shared interests convene to advance knowledge and skills by sharing information, resources, and experiences.	<ul style="list-style-type: none"> <li>• Multiple mentees share a programmatic interest.</li> <li>• Gathering as a group builds solidarity and often inspires creativity and confidence in COP members.</li> <li>• Several organizations are committed to longer-term engagements.</li> <li>• Organizations are willing to share with others.</li> <li>• A mentor or an appointed leader or coordinator is available to manage knowledge sharing.</li> </ul>	Yes, but it is helpful if organizations’ members have opportunities to meet face to face. More interactive collaboration requires strong Internet connection.	One to many

**SOUTH-TO-SOUTH MENTORING TOOLKIT**

S2S MENTORING APPROACHS	DEFINITION	WHEN TO USE	CAN IT BE DONE VIRTUALLY?	MENTORING SCENARIO
<b>STUDY TOURS AND SITE VISITS</b>	An approach where one or more mentee organizations are brought together with another organization for a visit designed to provide hands-on learning around a particular area of expertise.	<ul style="list-style-type: none"> <li>• An organization has been identified as doing something exceptional.</li> <li>• Mentees value and want to learn what this organization is doing so well.</li> <li>• A study tour/site visit could be paired with another learning approach (e.g., a COP) to deepen learning and skills uptake.</li> <li>• Budget and staff are adequate for arranging visits that require travel.</li> </ul>	No.	One to one  One to many
<b>EXCHANGE VISITS</b>	An approach where two or three organizations visit one another for the purpose of hands-on learning around particular areas of expertise.	<ul style="list-style-type: none"> <li>• Two to three organizations engaged in similar or complementary programming can articulate a compelling need to visit one another to learn from each other's work or engage in joint learning.</li> <li>• For quality improvement or scale-up, it is critical for programming that these two to three organizations learn from one another.</li> <li>• Budget and staff are adequate to organize visits that require travel.</li> </ul>	No.	One to many
<b>EXCHANGE EVENTS</b>	An approach where multiple organizations come together for organized and facilitated one-time exchange of knowledge and/or skills.	<ul style="list-style-type: none"> <li>• The workshops or events are part of a longer-term learning approach (e.g., COP).</li> <li>• Participants are at a significant distance from one another, and frequent visits/exchanges are not possible.</li> <li>• Note: A one-off event can still generate value!</li> </ul>	Yes. A Webinar would be a possibility, but face-to-face interactions are more effective.	One to many
<b>INTERNSHIPS AND SHADOWING</b>	An approach where one person from one organization is placed for an extended period within a second organization for the purpose of mastering a specific set of skills, which the mentee then takes back to his or her home organization.	<ul style="list-style-type: none"> <li>• A specific high-potential individual will benefit from hands-on experience at the mentor's or another organization's site.</li> <li>• The skill set to be acquired is complex and requires long-term hands-on learning.</li> <li>• The value for the organization sending away its staff member exceeds the cost of losing the individual's work for an extended period.</li> </ul>	No. Some components may be virtual, but there must be some face-to-face engagement.	One to one

**SOUTH-TO-SOUTH MENTORING TOOLKIT**

S2S MENTORING APPROACHS	DEFINITION	WHEN TO USE	CAN IT BE DONE VIRTUALLY?	MENTORING SCENARIO
<b>RESOURCE REFERRAL</b>	An approach where a specific need of one or more mentees cannot be fulfilled by any other member of that community. The mentor identifies external resources (e.g., materials, courses, people, and institutions) and brokers linkages with mentees.	<ul style="list-style-type: none"> <li>• A skill or knowledge set does not exist within the community of organizations.</li> <li>• Appropriate resources can be identified.</li> </ul>	Yes. Resources may include online courses or virtual coaches.	<p>One to one</p> <p>One to many</p>
<b>TELE-MENTORING</b>	An approach where the mentor is supporting the mentee’s learning virtually.	<ul style="list-style-type: none"> <li>• The mentee has clearly defined needs that a mentor can realistically address virtually.</li> <li>• The need for learning is simple enough that it can be completed with distant support, yet still requires long-term engagement.</li> <li>• Both mentor and mentee have time and manpower to dedicate to learning and following through post interaction.</li> <li>• Mentor and mentee are not geographically close but have access to high-quality telecommunications.</li> <li>• The budget will not support face-to-face mentoring.</li> </ul>	Yes. However, face-to-face interaction can help build trust and social capital between mentor and mentee.	One to one

## OTHER CONSIDERATIONS

Successful mentoring is a long-term process that should aim to support the mentee through testing, tailoring, and institutionalizing successful practices. Therefore, on-site mentoring—as for all other S2S approaches—comprises only part of the overall mentoring process. It is important to link the work performed on site to overall mentee learning goals. While planning the mentoring process, consider whether the organization has the resources to ensure appropriate follow-up and to integrate the new skills and practices into its work. Plan for repeat on-site mentoring visits as necessary.

## Twining

In twinning, a mentor pairs up two mentee organizations to establish a long-term relationship for facilitated exchange and mutual capacity strengthening. This relationship helps generate local and regional knowledge, while also seeding coalition building. Because of its trust- and relationship-building aspects, this approach is helpful to use as a first step in establishing deeper partnerships or sustainable collaborations. Twining creates a safe space to explore organizational strengths, weaknesses, and experiences between peer organizations.

Bringing two like-minded organizations together for a long-term learning partnership incentivizes both to continuously improve performance. When they share their best practices or design and test them together, they are able to more efficiently replicate and expand promising or successful work.

## TWINNING PLANNING AND IMPLEMENTATION STEPS

- With mentees, identify potential partnerships based on need, interest, and organizational cultures.
- Bring the pairs together for an initial meeting to build social capital, develop common learning goals and an agenda, and draft a working plan for the engagement.
- Allow mentees to take the lead in skills and knowledge transfer.
- Check in frequently on progress; highlight successes to encourage continuing collaboration.
- Adapt the work plan based on evolving needs and priorities. Suggest course corrections if progress is slow.
- Encourage mentees to develop new twinning relationships on their own.

## OTHER CONSIDERATIONS

While arranging a twinning relationship, mentors should help organizations consider available time, staff, and resources for the partnership. The benefit is that organizations may define and limit their engagement according to these considerations as long as the relationship evolves over time and proves useful for both sides. If not, another shorter-term approach (e.g., study tours or peer exchange workshops) might be more beneficial.

## Community of Practice

Providing a powerful shared learning approach, a COP brings multiple actors to the table and enhances exchange of relevant experiences, knowledge, and skills; its participants fully drive its agenda. There are few expectations beyond sharing what the organizations want to share, so a COP allows organizations to contribute according to their capacity and availability. It can be empowering to organizations of key populations, in particular, because COPs tend to highlight how multiple actors share the same challenges, concerns, and successes. Consequently, a COP provides a sense of belonging to something bigger.<sup>4</sup>

In a COP, mentees may also play a mentoring role in their areas of strength. A COP allows mentors to reach many organizations at once with new knowledge. COPs may lead to scale-up of promising ideas, provided that mentors help with quality assurance. Participating in a COP incentivizes all members to represent themselves at their best, helping mentors identify local leadership and agents of change. When COP members develop strong bonds, they may join forces to address shared advocacy issues.

### COP PLANNING AND IMPLEMENTATION STEPS

- Identify optimal members for the COP.
- Plan for the convening event; gather information about members' interests and needs.
- Convene representatives from a group of organizations to strategize COP launch and planning.
- Develop objectives; plan for COP activities.
- Set up a virtual platform for communication and knowledge sharing, based on existing options.
- Engage in online and offline knowledge sharing, with communication about the platform, peer exchange, external and internal speakers, joint analysis, site visits, study tours, and so on.
- Engage the group in periodic reflection to analyze progress.

### OTHER CONSIDERATIONS

Before convening a COP, be mindful about gathering groups of key populations in hostile environments that may disrupt the COP or even expose participants to violence and abuse. A sense of safety and security is extremely important for all participants and for a successful COP. When face-to-face meetings are not feasible, consider an online COP as an

#### Be Ready for Unintended Outcomes of a COP

Because COPs involve multiple mentees and COP exchanges can take unexpected turns, the mentoring may end up focusing on areas that are not on the agenda but that interest the mentees. Results from these unintended outcomes can be rich nonetheless. Be flexible to allow for such discussions, and be sure to document the detours in any mentoring feedback or reporting.

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<sup>4</sup> As a result, many key populations have already formed national, regional, and global networks. Therefore, a COP will want to enhance, and not duplicate, any work already being done.

alternative. Also assess the intensity of COP organization in terms of resources and labor. It is not only expensive to regularly convene a COP face to face, but it also requires a diversity of capacities (e.g., logistical, facilitation, IT, knowledge sharing and management, and handling diverse viewpoints).

## Study Tours and Site Visits

One of the foundational principles of adult learning is the importance of the practical application of knowledge. Any adult who chooses to learn something new will ask the questions, “How does it look in practice? How can I use it in my work?” That is why study tours and site visits are so powerful for learning. Participants can ask more-insightful questions and understand responses more deeply about the knowledge proffered and its application. Seeing the others’ experiences in real life makes it easier for mentees to replicate similar techniques and activities at home. For the organization being studied, hosting guests who come to learn from their experiences is extremely motivating and can inspire even better work.

### STUDY TOURS AND SITE VISIT PLANNING AND IMPLEMENTATION STEPS

- Identify an organization that has something to share (either from the group of mentees or externally) and based on mentees’ expressed interest in learning.
- Support the study tour’s host in planning. Develop an agenda for the study tour.
- Arrange for visitor logistics.
- Support implementation of the study tour.
- Help improve the flow of learning by encouraging dialogue.
- After the tour, monitor uptake of new practices and knowledge among participants over time.

#### Seeing Is Believing!

Study tours and site visits are powerful tools for learning—they allow participants to see how things are done on the ground outside their own organization and highlight the complexity and challenges of implementation in real-world settings.

### OTHER CONSIDERATIONS

Keep in mind that not all organizations participating in a study tour will need or want to replicate what they see. This does not mean that the study tour did not generate value: the presence of multiple opportunities for learning and sharing at the site always yields surprising unintended outcomes. Design of post-visit monitoring and evaluation must take this into account. Finally, in the study-tour planning, consider key populations’ safety and security.

## Exchange Visits

The benefits and reasons for engaging mentees in reciprocal exchange visits are similar to those for study tours. Exchange visits support the way adults learn, illustrate real-world application of practices and knowledge, and are highly motivational for all. Additionally, reciprocity of the

knowledge exchange positions mentees as peers who are motivated to improve their practices based on what they see at each other's sites. They may also see the exchange as an additional incentive for future collaboration. Mentees may decide that they have more in common than shared learning and may join together to develop innovative approaches over the long term.

### EXCHANGE VISITS PLANNING AND IMPLEMENTATION STEPS

- Identify two or three organizations that stand to benefit from exchanging expertise.
- Support participants in developing goals, targeting outcomes, and outlining agendas.
- Help to plan visitor arrangements.
- Facilitate implementation of the exchange and the flow of learning by stimulating dialogue.
- After the exchange, monitor and ensure uptake of new practices and knowledge over time.

### OTHER CONSIDERATIONS

To help participants get the most out of their experiences, ensure that every exchange visit has clear goals and targeted outcomes. For effective uptake of learning, request that at least two to three participants from each organization join the visits; these participants should have authority to implement any learning in their own organization. As when you are planning for a COP or study tour, consider key population participants' safety and security.

## Internships and Shadowing

Investing in individuals is an important aspect of organizational capacity development, especially when it comes to specific complex skill sets that are not easily translatable or transferrable to colleagues in the home organization. Giving individuals in-depth, hands-on experience with another partner via an internship or shadowing is a good way to position them to make changes within their home organizations. Additionally, having a staff member spend longer periods of time at another organization may lead to fruitful future collaborations.

### INTERNSHIP AND SHADOWING PLANNING AND IMPLEMENTATION STEPS

- Identify a complex skill set needed by one organization and practiced successfully by another organization. Do this in collaboration with both organizations and the possible future intern.
- Identify a high-potential individual who is available to intern or shadow and who is committed to bringing knowledge back to his or her home organization.
- Help both organizations set internship parameters and rules of engagement.
- Monitor progress.
- After the internship, ensure adoption of the new skill set in the home organization.

### OTHER CONSIDERATIONS

Consider putting in place a contract for the intern to ensure that he or she will return to the home organization for a certain period after the internship. If the two organizations are in different towns

or cities, plan for the intern's safety and logistics. Ensure that there are sufficient resources and that all are fully aware of the internship's potential benefits and challenges. It can be helpful to clarify mechanisms and lines of supervision and reporting.

### Promising Practice

#### *Sensitizing Police Cadets in Thailand*

In one area of Thailand, police often set up check points near drop-in centers (DICs) for PWID, who often experienced violence and abuse at the hands of police. These negative encounters with law enforcement significantly compromised health-seeking behaviors and uptake of HIV services among PWID. KPOs and others found that a powerful way to sensitize police was to find ways for new cadets to work with the KPOs. An innovative idea being piloted in Thailand is to integrate sensitization on harm reduction approaches into the police academy by offering internship periods with PWID organizations as part of their cadet training. The Thai NGO Ozone, with support from Population Services International (PSI) and the United Nations Office on Drugs and Crime (UNODC) set up cadet internships at Ozone's DICs providing overdose prevention and other services for PWID in a program modeled after one from Service Workers In Group (SWING), where police cadets interned with sex worker organizations. As a result of these internships and related sensitization at the police academy, police:

- Arrested fewer DIC staff and clients
- Started referring small-time users to the DIC instead of arresting them
- Trusted DIC staff more

Results included better understanding and collaboration with law enforcement and consensus that DIC staff and peer educators were working toward the same goals. Police even realized that by working with DIC staff and peer educators, they could actually reduce their workloads. In addition, official mechanisms are being discussed to formalize partnerships with law enforcement in line with a new national harm reduction policy approved in February 2014.

This case story is an important and innovative example of how key populations can mentor others (such as law enforcement, health workers, or government officials) about how to increase service uptake and therefore improve the health and well-being of key populations.

## Resource Referral

Most mentors are unlikely to know everything a mentee wants to learn. For mentors, reaching out and brokering new relationships is an important skill set, as is understanding what exists beyond an immediate community. Sometimes skills and knowledge critical to success do not exist within the mentor/mentee community but do not require investment in a mentoring program to acquire and adopt. In such situations, the mentor will need to identify external sources of these skills and knowledge—experts, networks, connections, online courses, Web sites, or literature. It is then the mentee’s responsibility to use these resources to the best advantage; when mentees take on this responsibility, local ownership of the capacity development process is bolstered. Resource referral is particularly useful for introducing innovative ideas, up-to-date research, and cutting-edge practices.

### RESOURCE REFERRAL PLANNING AND IMPLEMENTATION STEPS

- Identify a needed knowledge or skill that is not available within the community.
- Identify and vet external providers of this skill or other external resources.
- Link organizations in need of this skill set with the vetted providers or resources.
- If needed, help organizations to identify funding or room in their budget to engage the external provider.
- Monitor progress and outcomes.

### OTHER CONSIDERATIONS

External resources could be local or international consultants, nongovernmental organizations (NGOs), private firms, academia, government connections, networks, or coalitions. Other resources could be offices or meeting space, written or electronic information, or other learning opportunities. In mentoring organizations, consider the appropriateness of the resource you suggest to organizations’ needs, size, and budget.

## Telementoring

Telementoring is an inexpensive approach that does not require a huge time commitment. It can be short and focused or extensive and complex. Either way, it involves a mentor who is available for brief check-ins with a mentee, either on a regular basis or just as challenges arise. Mentees appreciate support on demand, support that can help solve an urgent problem and save time and trouble. Because mentor and mentee come to know each other well, the telementoring relationship can be helpful when the organization needs to tackle routine challenges.

### TELEMENTORING PLANNING AND IMPLEMENTATION STEPS

- Start planning well in advance to ensure availability of key participants.
- In collaboration with the mentee, outline the telementoring goals and expectations.
- Develop a tentative agenda and schedule, keeping in mind that things are likely to change.
- During implementation, ensure that the mentor has access to dedicated staff in the mentee organization. Minimize distractions.
- Hold frequent check-ins and debriefs with the mentee team.
- Be open to ad hoc meetings, calls, and e-mails to tackle emerging issues.
- Maintain an ongoing list of follow-up items and people responsible for implementing them.
- Follow up regularly, and provide support via phone, e-mail, Skype, Webinar, WhatsApp, and the like, to monitor, clarify, and troubleshoot.
- Be available, and ensure that mentees feel comfortable reaching out.

### OTHER CONSIDERATIONS

A relationship that is not solely virtual often becomes stronger. Some issues are much easier to tackle face to face. The virtual nature of telementoring means that it is best paired with other methodologies for maximum impact. For example, telementoring could be used as an effective way to follow up on specific areas of interest that develop from a face-to-face COP. Given the limitations of telementoring, it is also best for participants to have realistic expectations. If the organization does not have the resources to ensure follow-up after face-to-face knowledge transfer to help integrate new skills and practices, telementoring can quickly become challenging and frustrating. If the limitation is on the mentor's side (e.g., lack of availability to accept mentees' calls), the mentor needs to resolve the problem.

## Sharing Know-How on Skype

### *Galvanizing Key Populations across India and Africa*



With funding from the Bill & Melinda Gates Foundation, FHI 360 is implementing the India Learning Network/Bridge Project to disseminate lessons learned from HIV programming and provide technical assistance to countries in Africa and Asia. The project uses online and virtual technical assistance (i.e., web-based training courses, videoconferencing, and e-tutorials) to connect communities and transfer learning.

Two groups that have met were from Aastha Parivaa—(Federation of Male, Female and Transgender Sex Workers) in Mumbai, and from key population projects in Ethiopia, Ghana, and Zambia. The S2S mentoring happened via Skype. Four interactions took place, facilitated at both ends by members of the mentor and partner organization to ensure that the conversation flowed and to assist with translations.



Key populations in India and Africa shared their thoughts and experiences on issues crucial to them. As a result of these exchanges, sex workers in India and Africa were able to visualize solutions to common problems. A sense of camaraderie developed. Key populations at both ends shared their problems, strategies, and plans for the future. Groups were galvanized to replicate learning in their settings.

Focusing on community achievements shared by the key populations, participants themselves found the experience enlightening. It led to greater acceptance of new ideas and strategies and a sense of cross-national solidarity. Although sharing know-how in this way is free, not resource intensive, fairly easily organized, and replicable across multiple countries, it's important to give forethought to managing time differences and bandwidth issues.

## Exchange Events

A peer exchange workshop, or a face-to-face meeting of a mentor and mentees from several organizations, showcases the knowledge and skills of all involved in a short time. Activities of this type give organizations and their staff a sampling of their peers' skills and knowledge and can facilitate an honest and open exchange about their shared successes and challenges: what is difficult, what is working well, and what is not.

Meetings should be focused, with agendas developed in cooperation among mentor and mentees. The sharing and learning help both to review organizations' strengths and weaknesses and to generate new ideas for individual S2S mentoring plans. Opportunities for further twinning, study tours, exchange visits, or COP initiation often arise during peer exchange workshops.

### PEER EXCHANGE WORKSHOPS AND EVENTS PLANNING AND IMPLEMENTATION STEPS

- Identify meeting objectives and outline an agenda.
- Engage participants in identifying where they can contribute skills and knowledge.
- Support participants in presenting their skills and knowledge in areas relevant to the event topic.
- Facilitate mentee exchanges.
- Follow up to understand the knowledge and skills transferred and other meeting outcomes.

### OTHER CONSIDERATIONS

Although workshops are a great opportunity to discuss ideas and experiences, the level of knowledge that participants can actually gain and share may be limited; one can achieve only so much during a single meeting. In-country meetings, where participants do not have to travel far, should be brief (i.e., between one and three days) in order to take into account heavy workloads and limited staffing resources. Meetings that entail extensive travel time and costs should be longer, or paired with other meetings to make them cost- and labor-effective.

In addition, as with other face-to-face mentoring gatherings, the safety and security of key population participants should be a focus while planning.



## **The Freedom to Share** *Multidirectional Mentoring from Peer to Peer in Latin America*

S2S mentoring can take place in multiple directions. Over two days in January 2015, Centro de Investigación y Promoción para América Central de Derechos Humanos (CIPAC) of San José, Costa Rica, hosted visits for two days in Costa Rica with Corporación Kimirina of Quito, Ecuador, and the Global Forum on MSM and HIV (MSMGF) of Oakland, California, to share lessons and strategies.

CIPAC and Kimirina are both experienced, recognized organizations from middle-income countries in Latin America that lack sufficient government support for MSM health and human rights. The MSMGF is a global advocacy network focused on full sexual health and human rights for MSM worldwide. Despite accomplished track records, CIPAC and Kimirina sometimes experience regional isolation, with limited face-to-face contact with one another and with organizations beyond their subregions of Central America and the Andes. The meeting was designed to counter such isolation.

The agenda was co-developed, based on their interests and needs. Discussions focused on six themes: community accountability to community; balancing advocacy and service delivery; health sector accessibility and accountability to MSM; technical advisory and capacity building; lessons, frustrations, needs, and opportunities relating to the Global Fund; and a curriculum for quality MSM services. The meeting was designed as multidirectional mentoring, rather than for one organization to deliver TA to or mentor the others, and it evolved into a rich exchange of information, philosophies, institutional memory, and strategic planning. The candid peer discussion became an open, honest exchange of information about what is difficult and not working well—something not always possible when donors and outside observers are present. The mentoring was mutual between CIPAC and Kimirina as they compared and contrasted their approaches. They also gave critical feedback to MSMGF, calling for improved communications among local, regional, and global counterparts.

Such exchanges are rare yet highly beneficial. CIPAC expressed a hunger for a venue where Latin American peer organizations could engage one another and compare local and subregional approaches to their work. Kimirina spoke of the importance of strategizing together as peers, particularly when working in contexts that are unsupportive of, and even hostile, to civil society and MSM. The two organizations plan to stay in communication and perhaps visit one another to continue their dialogue.

# Preparing for Mentoring

The process of mentoring is focused and intentional. It will not be effective if it is undertaken casually or without forethought. Therefore, it is important to take the time to prepare to become a mentor—identifying internal strengths, realistically evaluating how much is available to commit to the relationship, and determining the goals of the relationship.

This section will help participants think through those elements to set the stage for mentoring success.

## Skills of Successful Mentors

Successful mentors must master skills in three categories.

- **Technical skills:** Relevant and contextual knowledge, skills, and information on a subject, to underpin strong professional advice, are vital to success as a mentor. Mentors can help mentees understand challenging concepts, find solutions to complex issues, and share useful resources and contacts.
- **Interpersonal skills:** Successful mentors are inspiring, appreciative, supportive, empathetic, good at communicating and giving feedback, responsive, adept at building positive working relationships with people, and well organized. It takes time and experience to acquire this combination of skills.
- **Facilitation skills:** Questioning, listening, attending, structuring, and summarizing are among key facilitation skills. Many mentors prefer not to suggest straightforward responses to mentees' issues but instead to engage in joint inquiry and learning.

### Mentoring Skills

- Practicing active listening.
- Asking open-ended questions.
- Giving feedback.

When recruiting individual staff members to serve as mentors, see whether the individuals have demonstrated mastery of these skills in the act of performing their job. When hiring individuals as mentors, look for these qualities in their CVs, ask about them when contacting references, and most importantly, assess for their presence during interviews (via a mock facilitation). Remember, however, that good mentors are difficult to find, and although some interpersonal qualities are indispensable, many technical and facilitation skills can be acquired through training and practice.

No organization automatically has mentoring skills; they are developed through learning and practice. Organizations can prepare to become good mentors. The following steps can help those desiring to become a mentor ensure that they are ready to support others.

## **Mentees: Identify Priority Needs and Interests**

Mentoring is primarily for the benefit of mentees and mentees are the primary drivers of the mentoring process. Therefore, it is important that mentee organizations understand what they would like to gain from the process. As mentees prepare to engage their mentor, they should reflect upon their capacity development goals. They might also consider challenges they consistently face and would like help in overcoming. Or they might consider areas in which the organization already shows promise but could benefit from further strengthening because that knowledge is critical to the organization's effectiveness. Any previous capacity assessments, evaluations, or constituency surveys that are available should be consulted to gain as many outside perspectives as possible.

## **Mentors: Inventory Your Assets and Expertise**

It is important to first establish what you have to offer another organization. Reflect on the three types of skills described above. Identify what you know and what you have learned. Identify a list of internal experts willing to be a part of the mentoring process. This list should ideally include people with technical knowledge, people skilled in organizing people and groups, and people good at facilitating learning and change processes.

Next, think of how you can package your knowledge for delivery. You may have manuals, documents, or training programs that can be used, adapted, or customized. Make an inventory of these resources, and ensure that they are understandable and easy for mentees to access.

## **Create an Internal Organizational Mentoring Management Plan**

Good mentoring takes significant time and energy. Making a commitment to mentor means understanding what the commitment entails and preparing to fulfill it. Organizational mentoring requires additional coordination. Determine who will manage the process and how. Create time, space, and resources to engage.

It is often useful to have a mentorship coordinator—or one person who takes the lead in coordinating internally and communicating with mentee organizations. This is often not a full-time position but instead someone with enough time to dedicate to ensuring that the relationship is developing smoothly and not encountering significant challenges. This person should be someone who is good at handling many details and schedules so that the organization can respond to mentees in a flexible, consistent, and coherent way.

# The Mentoring Process

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Each mentoring relationship unfolds in a unique way, although participants move through predictable stages, even when duration, activities, or the sequence of stages varies. Each stage represents a key component of effective mentoring, and it is important to consider all of them.



## STEPS IN THE PROCESS

- 1. Build the relationship:** Mentor and mentees meet and begin forming the relationship, a critical foundation of their work together.
- 2. Identify expectations:** Participants decide on the specific needs and issues of their initial focus, as well as on the best mentoring approaches to use.
- 3. Manage the process:** Throughout implementation, all participants maintain activities and communication that facilitate progress.
- 4. Review the relationship:** Participants periodically check in to see if their relationship is achieving the results envisioned or if any changes are needed.
- 5. End the relationship:** Whether at the relationship's natural or premature conclusion, mentor and mentees decide their work is complete and bring the relationship to a close.

It is important to recognize that the process does not always follow a linear progression. There may be times when a mentor and mentee need to revisit a stage. For example, they may be in the management process (Stage 3) and find they need to do a better job at identifying expectations (Stage 2) or that their relationship needs additional strengthening (Stage 1).

The following sections will examine each step in more depth. Each mentor should use the activities and tools suggested below to help implement each stage as effectively as possible.

A list of resources recommended for more information and support is also provided. The content in this toolkit may speak most directly to LINKAGES mentoring activities, but the thinking behind

## SOUTH-TO-SOUTH MENTORING TOOLKIT

the steps and how they might be facilitated will undoubtedly be of use to anyone engaging in S2S organizational mentoring.

# Step 1: Build the Mentoring Relationship



The mentoring activity begins by first building a solid relationship to support later actions. This is the time to also establish the “value added” that the relationship will bring. This step is often overlooked in a rush to get to work, yet it has proven to be a critical element of successful mentoring.

## Initial Meetings

The process begins with mentor and mentee being introduced to one another by the LINKAGES project or in another way. Once that has been done, it is up to participants to start.

An initial meeting would involve coordinators or contact people from both organizations, along with other staff and volunteers who may be involved. Face-to-face contact is best for developing relationships, although is not always possible. For longer-term relationships, it is a good idea to also engage leadership from both mentee and mentor organizations for an overview discussion of what will be accomplished, what activities will be involved, and the level of effort expected. This helps establish the “rules of engagement” and manage expectations of one another and the relationship.

The first step in planning for mentoring assistance, as for any other development intervention, is to assess the situation and understand the context.

### Who Should Attend the Initial Meeting?

All those holding the following roles should be present at the first meeting (with the understanding that one person may hold several roles):

- Organizational leadership or someone who can make decisions
- Champions or “gatekeepers” in both organizations who can bring the right people together
- Technical or knowledge experts
- Individuals being mentored directly (or at least their representatives)

Some questions mentors may want to pose at this point are:

- What are the issues? What interventions are recommended to tackle them?
- What types of support are appropriate in the situation?
- What is your relationship with the assigned mentee?
- What kinds of mentoring and coaching are culturally appropriate in this community?

Preparedness when entering into a relationship cultivates its effectiveness. Knowing the answers to these questions before meeting the mentee for the first time sets the stage for building trust and limits basic contextual, cultural, and social missteps.

Mentoring is inherently highly participatory, driven simultaneously by mentor and mentee.

Mentees should have an equal voice in how the partnership is managed. Without a mentee's full participation, new knowledge and learning will not be meaningful or well integrated. Therefore, listening to responses is as important as being prepared. Try to understand the mentee's context and the issues fully; see the situation from their perspective.

This is not the time to do most of the talking or play the role of expert. Show interest in the mentee and the organization's work. Listen to what is being said—and, perhaps, to what is not being said. You will come away not only with a deeper understanding of the situation but also a stock of trust built with the mentee.

### Characteristics of Effective Relationships

Effective relationships are built upon:

- Trust
- Mutual respect
- Commitment
- Acceptance and flexibility
- Shared or compatible values
- Honesty and direct communication
- Preparation
- Willingness to work through obstacles

### Build Trust

Mentee motivation and buy-in are critical to successful mentoring. Therefore, mentors need to spend some time building trust and comfort between themselves and the individuals within organizations to be mentored and to agree on the benefits of longer-term engagement for organizational effectiveness. Part of the mentoring process is to outline and understand one another's expectations, incentives, and organizational cultures.

While trust, respect, and doing no harm are key to S2S mentoring, the mentor and mentee are likely to establish and agree upon additional principles for their partnership. Identify these principles up front—the time spent identifying agreed-upon roles and expectations will pay off in the long run. Rapport building may also involve making introductions, developing procedures and protocols for interactions, determining the duration of the intervention, and other issues.

### Trust Implications for One-to-Many Mentoring

- Some organizations may be in competition with one another; initial partnership stages must address this reality.
  - Rapport-building activities may take more time; mentees' level of comfort with one another (or discomfort) must be acknowledged.
  - Mentors must ensure that there is equal participation among mentees in groups; each must be heard and valued.
  - Organizations have different needs and may have different learning objectives, which in turn require different kinds of and approaches to support.
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## STAGE SUMMARY: BUILD THE RELATIONSHIP

### WHY IT IS IMPORTANT

- To initiate contact between the organizations
- To build trust between the mentor and mentee
- To cultivate ownership on behalf of the mentee

### HOW IT IS DONE

- Hold "getting-to-know-you" conversation outside the work planning
- Conduct an orientation meeting through an on-site visit to show interest, see the environment, and better understand the context

### RESOURCES

- Orientation Meeting Discussion Guide (**Annex 2**)
  - [Appreciative inquiry](#) to help mentees discover their strengths and assets and to dream their aspirations
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## Step 2: Identify Expectations and Approaches

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Once the foundational relationship has been established, the next step is an analysis of mentee skills and knowledge and an identification of needs and areas for mentoring. This might be done through discussion at a meeting, focus group, or workshop. More frequently, there is an organizational capacity assessment.

### Conduct Capacity Assessments and Develop Learning Objectives

The capacity assessment process results in a short list of identified priority areas that the mentee would like to improve upon in order to meet larger goals. This list helps the mentee clearly outline learning objectives and to identify indicators of success, which are critical to the process. As mentors become important in the mentee's work, they will be tempted to be helpful on many different fronts and may lose sight of the original purpose of the mentoring relationship. Clear objectives and indicators help keep the process streamlined and focused on measurable results and make it possible to tailor the intervention based on a mentee's changing priorities and environment. These priorities must be identified in close partnership and collaboration with the mentee and agreed upon by both sides.

Another traditional way of looking at objectives is to identify the desired results in terms of knowledge, skills, and attitudes (KSAs). Knowledge objectives identify what types and pieces of information can benefit the organization. Skills objectives describe the actual capacity of individuals and organizations to put the knowledge into practice. Attitudes are behavioral competencies that help the organization to achieve its goals.

MENTORING APPROACH DECISION-MAKING MATRIX

	SELECT ONE PER QUESTION	TWINNING	STUDY TOUR	COP	ON-SITE MENTORING	TELEMENTORING	INTERNSHIP/ SHADOWING	RESOURCE REFERRAL	PEER LEARNING EVENTS	EXCHANGE VISIT
For the specific type of mentoring, is one organization involved, or are several?	ONE				<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
	SEVERAL	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>					<input checked="" type="radio"/>	<input checked="" type="radio"/>
Is the need for support in one area or in multiple areas?	ONE		<input checked="" type="radio"/>					<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	MULTIPLE	<input checked="" type="radio"/>			<input checked="" type="radio"/>					
In mentoring areas, does the mentee have experience?	YES	<input checked="" type="radio"/>								
	NO	<input checked="" type="radio"/>	<input checked="" type="radio"/>		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Are both time and budget available for travel and staffing needs?	YES	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>
	NO					<input checked="" type="radio"/>		<input checked="" type="radio"/>		
Are you able to engage over the long term or only in the short term?	LONG TERM	<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>			<input checked="" type="radio"/>
	SHORT TERM		<input checked="" type="radio"/>					<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Do participating organizations have high-speed Internet access?	YES	<input checked="" type="radio"/>	<input checked="" type="radio"/>			<input checked="" type="radio"/>				
	NO		<input checked="" type="radio"/>		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Number of dots circled, per approach										

## Choose Mentoring Approaches to Plan Interactions

Having identified mentorship objectives, mentors and mentees must choose the most effective approaches to reach them. (For an overview of different S2S mentoring approaches, see p. 19.) The decision matrix above will be helpful in making these decisions. Once approaches are determined, use the mentoring plan template (Annex 3) to document expectations and agreements.

The best mentoring programs use a combination of approaches to ensure that they address mentees' needs in a manner that will have the most impact. As a mentor, consider these questions to choose the most appropriate approaches:

- Are you mentoring one organization or several?
- Is there need for support in one area or in multiple areas?
- What is the mentee's current level of experience in the areas in which you will be mentoring?
- Are time and money available for travel and staffing requirements?
- Are you as a mentor able to engage over the long term or only in the short term?
- Over what period of time is your mentee available and committed to engage in the process?
- Do all participating organizations have access to a high-speed Internet connection?

The table above is helpful for choosing your mentoring approaches based on the number of mentees, their accessibility online, and the amount of support required versus available budget.

During action planning, mentors and mentees must ensure that adequate resources and infrastructure for visits are available (e.g., for hotels, transportation, activities venues) and that good telecommunications are in place for telementoring. Sufficient mentor and mentee time should be allocated for activities in the work plan as well as for follow-up between interactions. This is the time to make commitments about how and how often you will engage, such as via e-mail, Skype, phone, or in person.

When you are ready to put the actions into a mentoring plan, use the template in Annex 3. Monitoring will be needed during implementation, so develop the necessary indicators and milestones during this step for use in the next.

### Planning Checklist

- Are learning objectives clear?
- How will you communicate?
- How often will you communicate?
- Who are the point people?
- How will you recognize or measure success?

## STAGE SUMMARY: IDENTIFY THE EXPECTATIONS

### WHY IT IS IMPORTANT

- To establish the focus of the mentoring relationship, based on analysis of needs and expectations

### HOW IT IS DONE

- Do an organizational or technical capacity assessment
- Jointly formulate learning goals and a mentoring plan

### RESOURCES

- Organizational and Technical Capacity Assessments (page 57)
  - Mentoring Approach Decision-Making Matrix (page 40)
  - Planning Checklist (page 42)
  - Mentoring Plan Template (page 62)
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# Step 3: Manage the Mentoring Process

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After planning comes implementation, the longest stage of the mentoring process. If the mentoring support is complex or multidimensional—covering technical, organizational, managerial, and networking components—it might involve a variety of people and departments from the mentoring organization. During implementation, coordination of support is important so that mentors can focus on a number of issues and ensure the greatest success. To keep the mentoring relationship focused:

- **Assign each mentee organization a coordinator or team leader:** Organizational mentoring can involve diverse types of support and different people in the organization. A coordinator will ensure that all people involved in the mentoring process work in a coherent way in order to build synergy.
- **Develop a structured plan and clear agenda for each mentee interaction:** That said, do not limit contact to formally scheduled meetings. Also, allow meetings to flow naturally—for example, don't shut down the conversation if a participant brings up a new resource, opportunity, idea, or question on an area of interest that was not included in the original agenda. Between meetings, hold frequent informal check-ins to support more formal mentoring activities. These check-ins help the mentee link mentoring with ongoing work. They can also enhance the trusting relationship and sense of accompaniment.
- **Maintain a pace and timing that suits the mentee:** Many NGOs are overcommitted and understaffed. Mentoring should acknowledge the mentees' other commitments and work within their busy schedules.
- **Remain contextually grounded:** Remain responsive to mentee habits, customs, and traditions. Remember, mentors do not know everything. They are experts, but they are also facilitators, brokers of knowledge and relationships, challengers, listeners, and a sounding board for ideas. As your familiarity with your mentee grows, you will find new ways to give support.

## Maintaining Contact

Decide at the beginning how communication between partners will be managed. What channels will be used for communication? How frequently will you have formal or informal interactions? Between or among which individuals?

After the communication plan is developed, stick to it. Keep discussions open, frank, and constructive. Stay in touch formally and informally. Be reliable without being intrusive.

Remember that mentees are likely to be busy. You do not want to overwhelm them with your ideas or expectations.

## Practical Challenges and Tips

It is common for mentoring programs to face multiple challenges resulting from low mentor or mentee motivation, busy schedules, the nontangible nature of the results of the mentoring process, and other factors. Here are a few typical challenges and useful mediating activities.

### STAFF TURNOVER

- To address staff turnover in both mentor and mentee organizations, try to train and involve more than one person in mentoring and related activities. In smaller organizations, it might not be feasible to cross-train in this manner. At a minimum, ask that individual mentors and mentees regularly share plans and progress at staff meetings to keep others informed.
- Institutionalize mentoring processes to become part of job descriptions; address mentoring requirements during recruitment and transition.

### MENTEES WHO LOSE INTEREST

- Make a clear plan to keep the mentee focused on results.
- Check in frequently to ensure that the mentoring's technical focus is still relevant and of interest to the mentee.
- Propose different types of professional development activities to not only keep mentee motivation high but also to give mentees different avenues in which to learn.
- Establish mentees' buy-in from the beginning of the process to ensure their interest in the outcome.

### Representative Case

#### *Staying Flexible and Responsive*

A trans-led organization called “TransHealth,” based in a Caribbean country, runs a small health clinic for trans men and women. The clinic has been successful in providing integrated services, including hormone therapy, HIV testing and counseling, screening and treatment of sexually transmitted infections (STIs), condom and lubricant distribution, and care for victims of gender-based violence (GBV). The organization is mentoring other trans-led organizations in two other Caribbean countries and decides to arrange a two-day site visit for them to the TransHealth clinic. On Day 1 of the visit, the questions from participants focus less on how the services were integrated and more on how TransHealth has been successful in opening and operating the clinic in a setting that is very hostile to transgender people. The TransHealth mentors realize that working in hostile environments is the main area of interest (and challenge) for the mentee organizations and they allow time for a discussion about that on the second day of the visit.

#### *... and Capturing Unintended Benefits of Mentoring*

The TransHealth team was also able to document the main discussion points and learning. Although they had not intended to mentor on the topic of hostile environments, they found that several participants were able to articulate strategies for working in hostile environments at the end of the two-day visit.

- Maintain good mentor–mentee relationships and strong mentor–mentee connections to promote the success of mentoring interventions.

### MENTEES SHOWING LACK OF PROGRESS

- Correctly assess mentee needs and opportunities at the outset and develop a clear understanding of everyone’s expectations. Doing so helps to determine how much effort and time will be needed. Acknowledging that people have different learning curves and factoring that into the initial mentoring steps will enable the mentor to set achievable milestones and take smaller, more realistic steps toward progress.
- Collaboratively develop clear and achievable milestones.
- Refer regularly to the milestones and the timeline established at the beginning of the mentorship to decide if they are still relevant or if they need to be revised.
- Capture unintended benefits and progress. Although mentees may not be achieving results in the original area of focus, they might be gaining other valuable skills or experience through the mentoring process. Highlight these success with mentees to help energize them.
- As a mentor, stay flexible and be prepared to adapt the learning agenda as needs evolve.
- Conduct a thorough analysis to understand slow progress, remembering that people and organizations learn and change at different paces and in different ways. There could be several reasons for slow progress. Among them are (1) a mentor–mentee mismatch, which suggests the need for a new mentor to jump-start the process and (2) a mentee

may be overwhelmed with new information. If the mentee organization is not responding when the mentor is mentoring one person, it might help to involve others in the process (e.g., perhaps a more responsive person who is eager to learn).

### LACK OF MENTOR MOTIVATION

- Develop strict standards for selecting individual mentors to help ensure that they are motivated and prepared for the work involved in mentoring. This will eliminate the need to change mentors mid-intervention.
- Provide strong supportive supervision of mentoring activities to flag problems early and boost mentors' motivation when needed.

### INTERACTION WITH OPERATING ENVIRONMENT

- Often, environmental changes, such as severe weather or political events, interrupt ongoing support. The best strategy to prevent negative consequences is to remain adaptable and flexible about tools and approaches. It is also important to practice mentoring and coaching in a way that does not create unnecessary dependency between mentee and mentor.
- Prepare mentees to be proactive in looking for solutions independently and engaging in peer and self-learning.

### RESOURCE ALLOCATION

- Ensure that mentoring activities are well funded; proposal managers should include estimated costs in proposals and other budgets. This is more feasible to do with predetermined and structured mentoring (another benefit of this type of intervention). Telementoring is very cost effective.

### INAPPROPRIATE TECHNOLOGY

- Identify technology needs during planning and budgeting and purchase necessary equipment up front. The digital divide—or the difference in partners' comfort level with or access to mobile phones, Skype, and other communication devices—may be significant. Discuss these issues early on, and come to an agreement at the beginning.

### LACK OF TIME, LONG DISTANCE

- Plan for the appropriate method of delivery; lack of time for the mentoring process is often a factor of poor planning that did not take the existing work loads of mentors and mentees into account. If mentees are located far away, which prohibits frequent visits, a cost-effective solution is to link travel for mentoring purposes with travel for other purposes.

## HIGH DEMAND FOR MENTORING

- Consider multiple approaches to mentoring. Personalized support is one of the most efficient capacity development approaches, but this approach takes a great deal of effort. So as not to jeopardize other program components, add some less-resource-intensive methodologies—such as networking, resource referral, and peer learning—into the mentoring plan.
- While providing support and increasing a mentee’s self-learning capacity, ensure that skills are transferable to others in the mentee’s organization.
- When designing an intervention, take into consideration the time a mentor has to devote to the process. Determining the appropriate frequency for site visits and consultations is a challenge for mentors; mentoring even a few organizations is a full-time job.

## MONITORING AND EVALUATION CHALLENGES

- Keep monitoring and evaluation simple. Monitoring is often viewed as a difficult science, but at its core, monitoring is just a way to document progress and learn whether the program has achieved its intended objectives. Rather than place too much emphasis on monitoring, place emphasis on learning. The shorter and simpler the monitoring and evaluation tools are, the more effective your information gathering will be. Feel free to change and tailor any activities to suit your program’s context. An easy-to-use reporting form that can capture both mentor and mentee experience is available in Annex 4.
- Conduct regular reporting with appropriate tools and regular checks and then combine with overall programmatic monitoring (e.g., via quarterly reports).
- Use appropriate tools for regularly documenting the progress of the mentoring process. For documenting and analyzing successes, see the most-significant-change technique.<sup>5</sup>
- Document your intentions for the program before you start. Recognize that these may change along the way.

## MANAGING CONFLICT

- Ensure that mentee and mentor work together to resolve differences. Successful resolution will benefit the mentoring relationship. Conflict is a natural result of two unique individuals interacting and working with one another.
- When conflict occurs, set aside time to address it in a supportive environment, providing time for tempers to cool, if needed. Ask the parties to take turns clearly stating their issues. Express why you feel there is a disagreement. Discuss the topics at the heart of the conflict, relying on facts; avoid making judgments or drawing conclusions. Then be prepared to listen to feedback with an open mind. Confirm and clarify what has been stated, so that everyone understands the issues at hand. Finally, stay focused on a solution, and try to identify a common goal through compromise.

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<sup>5</sup> Rick Davies and Jess Dart, *The ‘Most Significant Change’ (MSC) Technique: A Guide to Its Use* (Cambridge, UK: Rick Davies; Hastings, Victoria, Australia: Jessica Dart, 2004), <http://www.mande.co.uk/docs/MSCGuide.pdf>.

- Consider engaging a trusted third party to act as mediator and help resolve the situation.

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## STAGE SUMMARY: MANAGE THE PROCESS

### WHY IT IS IMPORTANT

- To strengthen the mentees' capacity for quality programs and/or increased programmatic reach of key population services

### HOW IT IS DONE

- Implement identified mentoring approaches
- Maintain contact
- Work through challenges and obstacles

### RESOURCES

- Practical Challenges and Tips (page 45)
  - Mentoring Plan Template (**Annex 3**)
  - Mentoring Summary Report (**Annex 4**)
-

## Step 4: Monitor the Relationship



As implementation proceeds, it is important that the parties regularly reflect on their relationship to ensure they are receiving value and meeting their goals. Monitoring interactions and implementation of the mentoring plan is necessary in order to assess progress and fine-tune the intervention. Concise, accurate reports from monitoring visits can facilitate feedback loops with course corrections and review of the mentoring plan.

Monitoring helps show where progress is being made and where an adjustment might be necessary. Monitoring is not about finding fault—it is about learning. We monitor because feedback tells us what is going well and where we could do better.

Monitoring occurs throughout implementation. But there are four main points where it is appropriate to check in: after each mentoring event, quarterly, at mid-term, and when the intervention ends.

- **After individual mentoring events:** After each significant meeting or visit, prepare a short summary and action plan with agreed-on next steps, follow-up activities, and the people responsible for conducting them. This summary and plan will help partners focus on learning objectives and understand priorities. It is not necessary to complete this after every contact—only after contacts that generate follow-up activities. The template in Annex 4 outlines the task.
- **Quarterly:** Review progress markers and benchmarks quarterly to confirm progress and ensure that the plan is still relevant. The template in Annex 5 outlines this task. If the mentor has more than one mentee, it might be helpful to set aside time each quarter to gather the mentoring team together to review each mentee. For example, it might be appropriate to devote some time to monitoring progress and coordinating activities for each mentee.

### Stay Mindful of the Purpose of the Monitoring

Remember, there is no point continuing with plans made early on if goals have changed over time. Thus, although monitoring is helpful, staying adaptable and flexible to respond to emerging needs is equally important, allowing the original plan to change as new needs, interests, and opportunities arise.

- **At mid-term:** If the mentorship is to last for a finite period, a mid-term review is helpful in order to assess intermediate outcomes and make course corrections. This review can focus on the quality of the relationship in addition to progress indicators and milestones. The template in Annex 6 outlines the task.
- **At the end of the relationship:** When mentoring concludes, mentor and mentee should both reflect on progress and lessons learned. The template in Annex 7 outlines the task.

## Recognize Progress

Given the effort that both the mentor and the mentee are putting into improving the mentee's capacities and performance, it is important to recognize achievements and give credit for work performed.

Providing that sense of accomplishment is critical. Find ways to mark progress and celebrate it! For example, you might take pictures of critical meetings or milestones and post these along an online or poster-style timeline to document progress.

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## STAGE SUMMARY: MONITOR THE RELATIONSHIP

### WHY IT IS IMPORTANT

- To ensure that progress is being made on the learning plan (and why or why not)
- To ensure that the mentee is gaining value from the relationship
- To make adjustments needed to maximize effectiveness

### HOW IT IS DONE

- Document significant mentoring events and follow-up actions
- Complete quarterly or biannual review of benchmarks
- Conduct a mid-term review

### RESOURCES

- Mentoring Quarterly Report (**Annex 5**)
  - Mentorship Reflection Questionnaire (**Annex 6**)
  - Mentorship Evaluation Form (**Annex 7**)
-

# Step 5: End the Relationship

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All relationships change over time, and mentoring relationships are no exception. However, a mentoring relationship is not like a marriage or other permanent commitment. The purpose of the mentoring relationship is to help the mentee meet certain goals and eventually end the formal relationship, either when goals have been met or at the conclusion of an agreed-upon time line. Circumstances (e.g., change in role or organizational situations) may require the relationship to end earlier. Whatever the reason, how the mentoring relationship ends is important. This last step gives participants the opportunity to acknowledge gains and make plans to sustain advances.

Conclude your relationship in a positive and productive manner by:

- Giving as much notice as possible of the approaching end of the mentoring relationship
- Making clear that the relationship is changing not because it was unsuccessful, but because it has succeeded and it is time to pursue goals in a different way
- Being clear about how the relationship will ideally work after the formal mentoring is completed (e.g., will there be a new set of formal goals, or an informal relationship, or little communication?)
- Acknowledging specific areas of progress and growth observed in the mentee during the mentoring period
- Verbally recognizing the challenges that the mentee has faced and/or has overcome
- Helping the mentee set goals for the future and determine how those goals will be accomplished

## Closure

As the organizations conclude their relationship, bringing closure to the experience can help foster a sense of accomplishment, purpose, and direction for the future. Closure is often overlooked, with no formal ending provided, as mentors and mentees let the connection fade. If the relationship has been difficult, one or both participants may wish to avoid a potentially uncomfortable discussion. However, closure can be meaningful and mutually satisfying if both organizations enter the discussion with positive intent.

During the final meeting, review the developmental goals to mark progress. Discuss future goals and support systems needed to encourage continued development. Both organizations should contribute honestly to the conversation to recognize what has been achieved and to bring some closure to the work together. Reflect on progress and changes made since the start of the mentoring relationship. Giving good feedback on progress helps a mentee recognize organizational capabilities for further growth. Acknowledging challenges and obstacles as well can foster understanding of organizational capabilities for problem solving.

The following questions and discussion starters are designed to stimulate review and reflection.

- How far have we come?
- Were the planned goals achieved?
- What discussion or meeting had the most impact for you?
- What worked well?
- What did each organization learn outside the mentoring objectives?
- What would have been “even better if...”?
- What lessons were learned both by mentor and mentee?

Lastly, don't forget to celebrate successes! Mentors and mentees should acknowledge and celebrate what they have accomplished in their time together. Share appreciation for one another and for what each has gained from the association.

## Transitioning the Relationship

When initial mentoring objectives are completed, rather than ending the association, mentors and mentees may choose to set new goals and consider different approaches to their work together. Having formed their relationship, they may wish to stay engaged as peers on their own initiative, sharing information or working together on advocacy goals. Because the relationship's continuity does not necessarily prove its success, its continuance is not mandatory but simply a happy option.

Examples of how a mentoring relationship might continue include:

- Continuing to work on a new set of learning objectives, with the mentor's help
- Communicating information, tools, and lessons learned as colleagues
- Sharing contacts to expand their professional or activist networks
- Working together on a joint advocacy campaign

If continuation is planned, discuss how the relationship will transition. Be straightforward and clear about the end of the present commitment as well as about the ideal level and manner of future contact. Will you use phone calls or e-mails, frequently or occasionally?

## Ending the Relationship Prematurely

There are times that a mentor–mentee relationship ends earlier than planned, despite good attempts to nurture it. The end may come for a variety of reasons: because of organizational changes, loss of interest, unfulfilled expectations, changing circumstances, or because the mentor and mentee are simply not a good match. Premature closure of a relationship can be difficult for both mentor and mentee. It is important to recognize any problems as early as possible to try to resolve the issues, and, if they cannot be overcome, to end the association.

This process of discussing a problematic relationship is not always easy; conflict management resources linked in this toolkit can be helpful. Discuss issues early, politely, and respectfully—with assistance from an external facilitator, if necessary. Sometimes, when the mentoring relationship does not seem to be working as intended, it may be better to finish on a positive note than to extend the process further.

Most importantly, resist making any issues between mentor and mentee personal, which can damage the relationship. Avoid assigning blame or being spiteful. Uphold mentoring principles and focus on maintaining a safe, respectful environment. Try to part amicably, agreeing to disagree. Remember that reputations are on the line, relationships will continue, and differences may become known by others, so resolve active conflicts and bad feelings.

---

### STAGE SUMMARY: END THE RELATIONSHIP

#### WHY IT IS IMPORTANT

- To bring closure to the relationship
- To recognize accomplishments during mentorship period
- To make plans to end or transition the relationship

#### HOW IT IS DONE

- Plan a final reflection meeting
- Conduct a mediation meeting, as needed

#### RESOURCES

- Mentorship Evaluation Form (page 75)
- [Moving On](#)



# Annex 1: Resources

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## Resources by and for Key Populations

Bill & Melinda Gates Foundation. *Community Led Crisis Response Systems: A Handbook*. New Delhi: Bill and Melinda Gates Foundation, 2013.

[http://www.futuresgroup.com/files/publications/Community\\_Led\\_Crisis\\_Response\\_\(Web\).pdf](http://www.futuresgroup.com/files/publications/Community_Led_Crisis_Response_(Web).pdf).

World Health Organization. *Consolidated Guidelines on HIV Prevention, Diagnosis, Treatment and Care for Key Populations*. Geneva: World Health Organization, July 2014.

<http://www.who.int/hiv/pub/guidelines/keypopulations/en/>.

### MEN WHO HAVE SEX WITH MEN

George Ayala, Keletso Makofane, Glenn-Milo Santos, Sonya Arreola, Pato Hebert, Matthew Thomann, Patrick Wilson, Jack Beck, Tri D.Do. "HIV Treatment Cascades That Leak: Correlates of Drop-Off from the HIV Care Continuum among Men Who Have Sex with Men Worldwide." *Journal of AIDS and Clinical Research* 5 (2014): 331.

<http://dx.doi.org/10.4172/2155-6113.1000331>.

The GMT Initiative. *The amfAR GMT Initiative Mentoring Model: Strengthening Organizational Capacity and Impact Through Local Expertise*. New York: amfAR, 2015.

[http://www.amfar.org/uploadedFiles/\\_amfarorg/Articles/Around\\_The\\_World/GMT/2015/GMT%20Cap%20Building%20Report%20021815v233.pdf](http://www.amfar.org/uploadedFiles/_amfarorg/Articles/Around_The_World/GMT/2015/GMT%20Cap%20Building%20Report%20021815v233.pdf).

World Health Organization, HIV/AIDS Programme. *Prevention and Treatment of HIV and Other Sexually Transmitted Infections among Men Who Have Sex with Men and Transgender People: Recommendations for a Public Health Approach*. Geneva: World Health Organization, 2011.

[http://apps.who.int/iris/bitstream/10665/44619/1/9789241501750\\_eng.pdf?ua=1](http://apps.who.int/iris/bitstream/10665/44619/1/9789241501750_eng.pdf?ua=1).

## TRANSGENDER PEOPLE

Pan American Health Organization [PAHO], John Snow, Inc., World Professional Association for Transgender Health, et al. *Blueprint for the Provision of Comprehensive Care for Trans Persons and Their Communities in the Caribbean and Other Anglophone Countries*. Arlington, VA: John Snow, Inc., 2014. <http://www.who.int/hiv/pub/transgender/blueprint-trans-paho/en/>

Justus Einfeld, Sarah Gunther, and Davey Shlasko. *The State of Trans\* and Intersex Organizing: A Case for Increased Support for Growing but Under-Funded Movements for Human Rights*. New York: Global Action for Trans\* Equality and American Jewish World Service, 2013. [http://ajws.org/who\\_we\\_are/publications/special\\_reports/trans-intersex-funding-report.pdf](http://ajws.org/who_we_are/publications/special_reports/trans-intersex-funding-report.pdf)

## SEX WORKERS

International HIV/AIDS Alliance. *Sex Work Violence and HIV: A Guide for Programs with Sex Workers*. 2008. [http://www.aidsalliance.org/includes/Publication/Sex\\_%20work\\_violence\\_and\\_HIV.pdf](http://www.aidsalliance.org/includes/Publication/Sex_%20work_violence_and_HIV.pdf).

World Health Organization, United Nations Population Fund, Joint United Nations Programme on HIV/AIDS, Global Network of Sex Work Projects, The World Bank. *Implementing Comprehensive HIV/STI Programs with Sex Workers: Practical Approaches from Collaborative Interventions*. Geneva, 2013. [http://apps.who.int/iris/bitstream/10665/90000/1/9789241506182\\_eng.pdf?ua=1](http://apps.who.int/iris/bitstream/10665/90000/1/9789241506182_eng.pdf?ua=1).

World Health Organization, United Nations Population Fund, Joint United Nations Programme on HIV/AIDS, Global Network of Sex Work Projects, The World Bank. *Implementing Comprehensive HIV/STI Programmes with Sex Workers: Practical Approaches from Collaborative Interventions*. Geneva: World Health Organization, 2013. [http://apps.who.int/iris/bitstream/10665/90000/1/9789241506182\\_eng.pdf?ua=1](http://apps.who.int/iris/bitstream/10665/90000/1/9789241506182_eng.pdf?ua=1).

## PEOPLE WHO INJECT DRUGS

*The Critical Partnership for HIV Prevention: Building Positive Relationships with Police to Support Civil Society and HIV Programmes*. Workshop presented at AIDS 2014, July 23, 2014. [http://www.unodc.org/documents/hiv-aids/AIDS2014/Cap\\_build\\_session\\_LE\\_23.07.pdf](http://www.unodc.org/documents/hiv-aids/AIDS2014/Cap_build_session_LE_23.07.pdf).

World Health Organization, HIV/AIDS Programme. *WHO, UNODC, UNAIDS Technical Guide for Countries to Set Targets for Universal Access to HIV Prevention, Treatment and Care for Injecting Drug Users, 2012 Revision*. Geneva: World Health Organization, 2012. [http://apps.who.int/iris/bitstream/10665/77969/1/9789241504379\\_eng.pdf?ua=1](http://apps.who.int/iris/bitstream/10665/77969/1/9789241504379_eng.pdf?ua=1).

## Partnership and Mentoring Resources

Eva Halper. *Moving On: Effective Management for Partnership Transitions, Transformations and Exits*. Oxford, U.K.: The Partnering Initiative, 2009.

<http://thepartneringinitiative.org/tpi-tools/toolbook-series/moving-on/>.

Sue McManus and Ros Tennyson. *Taking the Walk: A Communication Manual for Partnership Practitioners*. Oxford, U.K.: The Partnering Initiative, 2008.

<http://thepartneringinitiative.org/tpi-tools/toolbook-series/talking-the-walk/>.

Pact, Inc. *Mentoring and Coaching Module, Learning Series Publications*, first edition. Washington, DC: Pact, Inc., November 2010.

Jessica Benton Cooney, Rachel DuBois, Angela Gasparetti, Irene Gathinji, Sarah Oppenheim, Matt Reeves, Ryan Winger, Olga Yakimakhov. *Pact Organizational Capacity Assessment (OCA) Handbook: A Practical Guide to the OCA Tool for Practitioners and Development Professionals*. Washington, DC: Pact, Inc., March 2012.

[http://pactworld.org/sites/default/files/OCA%20Handbook\\_ext.pdf](http://pactworld.org/sites/default/files/OCA%20Handbook_ext.pdf)

## Knowledge Exchange Resources

Shobha Kumar and Aaron Leonard. *The Art of Knowledge Exchange: A Results-Focused Planning Guide for Development Practitioners*. Washington, DC: The World Bank, 2013.

[https://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/The\\_Art\\_of\\_Knowledge\\_Exchange\\_revised.pdf](https://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/The_Art_of_Knowledge_Exchange_revised.pdf).

Korea Development Institute and World Bank Institute. *Using Knowledge Exchange for Capacity Development: What Works in Global Practice? Three Case Studies in Assessment of Knowledge Exchange Programs Using a Results-Focused Methodology*. Washington, DC: The World Bank, 2011. [https://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/The\\_Art\\_of\\_Knowledge\\_Exchange\\_revised.pdf](https://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/The_Art_of_Knowledge_Exchange_revised.pdf).

The World Bank Institute. *The South–South Experience Exchange Facility*. Washington, DC: The World Bank. [http://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/south\\_2011\\_brochure\\_final.pdf](http://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/south_2011_brochure_final.pdf).

# Annex 2: Orientation Meeting Discussion Guide

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## Instructions

The following conversation guide may be used at the beginning of a mentoring relationship to establish expectations and ways of working together. Feel free to adapt the contents to suit your individual interests and context.

## Get to Know Each Other

- What are the missions, strategies, and values of each organization?
- What projects, services, or initiatives does each organization currently implement?
- What are the areas of common interest and overlap?

## Identify Areas for Mentoring

- Describe how your organization currently works. What are your most important processes, systems, and structures?
- Now, imagine your organization working at its best. Describe this vision. What is in place?
- What capacities (knowledge, skills, attitudes, resources, or relationships) are you looking to develop in order to achieve this vision?
- How can mentoring help accomplish this vision?
- What are your expectations of the mentoring process?
- What technical areas are you most interested to receive mentoring in:

—Peer Education

—Peer Navigators/ Peer Case

Management

—Social and Behavior Change

Communication

—Clinical Services

—Violence Prevention and Response

—Stigma and Discrimination

—Other \_\_\_\_\_

—Adherence

—Networking

—Community Mobilization

—Advocacy

—Resource Mobilization

—Strategic Planning

—Financial Management

- What knowledge, skills, and resources will each organization bring to the collaboration?
- What specific benefits will each partner gain from the collaboration?
- Are resource and capability transfer two-way?

## Establish Operational Guidelines

- When and where will we meet?
- How will we schedule meetings?
- How will we communicate between meetings?
- What agenda format will we use?
- Will there be any fixed agenda items for every meeting?
- How will we exchange feedback?
- How will we measure success?

## Confirm Next Steps

- Schedule the dates, times, and place of future meetings.

# Annex 3: Mentoring Plan Template

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## Instructions

Each mentoring pair or group may complete this template as a way to document their understanding of what their mentorship relationship will accomplish.

1. Who are the mentors? \_\_\_\_\_

2. Who are the mentees? \_\_\_\_\_

3. Start dates of the relationship: \_\_\_\_\_

4. Anticipated duration of the relationship: \_\_\_\_\_

5. What type of mentoring will it be? (*Circle one*)

ONE-TO-ONE MENTORING | ONE-TO-MANY MENTORING |

6. What type of service will be offered? (*Circle all applicable*)

CONSULTING | TRAINING | MENTORING AND COACHING | RESOURCE REFERRAL

GRANTS | PEER EXCHANGE | OTHER (SPECIFY) \_\_\_\_\_

7. What type of capacity will be strengthened? (*Circle all applicable*)

TECHNICAL ORGANIZATIONAL RELATIONAL OTHER \_\_\_\_\_

8. What will be the format of the mentorship? (*Circle all applicable*)

ON-SITE MENTORING | TWINNING | COMMUNITY OF PRACTICE | STUDY TOUR/SITE VISIT

EXCHANGE VISITS | PEER EXCHANGE/WORKSHOP EVENT | RESOURCE REFERRAL |

TELEMENTORING | INTERNSHIP/SHADOWING

9. Why was this type of mentoring selected?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

10. What will be the technical area of focus for the mentorship?

- |   |   |
|---|---|
| <input type="checkbox"/> Peer Education                           | <input type="checkbox"/> Adherence              |
| <input type="checkbox"/> Peer Navigators/Peer Case Management     | <input type="checkbox"/> Networking             |
| <input type="checkbox"/> Social and Behavior Change Communication | <input type="checkbox"/> Community Mobilization |
| <input type="checkbox"/> Clinical Services                        | <input type="checkbox"/> Advocacy               |
| <input type="checkbox"/> Violence Prevention and Response         | <input type="checkbox"/> Resource Mobilization  |
| <input type="checkbox"/> Stigma and Discrimination                | <input type="checkbox"/> Strategic Planning     |
| <input type="checkbox"/> Other _____                              | <input type="checkbox"/> Financial Management   |

11. How can the mentor be most helpful to the mentee?

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12. What is the intended outcome to be achieved through the mentorship?

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13. Mentoring Implementation Plan *(Use the template on next page to develop objectives, visions of performance, and a mentoring plan.)*

14. Checklist for evaluating mentee objectives:

- Specificity:* Has the mentee identified specific long-term goals and mentoring objectives?
- Measurability:* Has the mentee determined how to measure success?
- Work Plan:* Does your mentee have an action plan to achieve organizational goals and objectives?
- Reality Check:* Are your mentee's goals and objectives realistic given the circumstances?

## Mentoring Implementation Plan

### Learning Objective #1

NOW		FUTURE	
Description of Capacity			
Indications of Performance			
MENTORING PLAN			
Activities	Person(s) Responsible	Resources Needed (Human, Financial, Material)	Timing

### Learning Objective #2

NOW		FUTURE	
Description of Capacity			
Indications of Performance			
MENTORING PLAN			
Activities	Person(s) Responsible	Resources Needed (Human, Financial, Material)	Timing

# Annex 4: Mentoring Summary Report

## Instructions

This short reporting template can help the mentor and/or mentee capture and document the main agreements of their meetings to ensure follow-up. It may be completed by either party and shared with the other.

### MENTORING PROGRESS REPORT SHEET

ORGANIZATION

MEETING DATE

MEETING PARTICIPANTS

AGENDA/DISCUSSION POINTS FOR THE DAY

PROGRESS ON THE MENTORING PROCESS/MILESTONES REACHED

FOLLOW-UP ACTIONS

ISSUES

RAISED	SOLUTIONS PROPOSED/TAKEN	PENDING

NEXT MEETING DATE

AGENDA FOR THE NEXT MEETING

REPORTED BY (MENTOR OR MENTEE, OR BOTH)

DATE

# Annex 5: Mentor's Quarterly Report

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## Mentor's Report

Mentor Organization \_\_\_\_\_ Date: \_\_\_\_\_

Mentor(s) Name (s): \_\_\_\_\_ Phone Number: \_\_\_\_\_

Mentee's Organization: \_\_\_\_\_

Mentee(s) Name(s): \_\_\_\_\_

What has been the technical area of focus for the mentorship?

- |   |   |
|---|---|
| <input type="checkbox"/> Peer Education                           | <input type="checkbox"/> Adherence              |
| <input type="checkbox"/> Peer Navigators/Peer Case Management     | <input type="checkbox"/> Networking             |
| <input type="checkbox"/> Social and Behavior Change Communication | <input type="checkbox"/> Community Mobilization |
| <input type="checkbox"/> Clinical Services                        | <input type="checkbox"/> Advocacy               |
| <input type="checkbox"/> Violence Prevention and Response         | <input type="checkbox"/> Resource Mobilization  |
| <input type="checkbox"/> Stigma and Discrimination                | <input type="checkbox"/> Strategic Planning     |
| <input type="checkbox"/> Other _____                              | <input type="checkbox"/> Financial Management   |

What are your organizational pair's learning objectives?

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What is the progress in achieving these objectives?

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What trends have you noticed in your mentee organization's progress or challenges?

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**SOUTH-TO-SOUTH MENTORING TOOLKIT**

Briefly describe the relationship between you and your mentee.

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How often did you interact with your mentee last month/quarter?

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DATE	TIME INVOLVED	ACTIVITY

Total Hours: \_\_\_\_\_

What are the measurable outputs and outcomes of the mentoring process to date?

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What successes have you had this month?

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What are some of the challenges?

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**SOUTH-TO-SOUTH MENTORING TOOLKIT**

Additional comments?

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Mentor's Signature

Date

*Thank You for Your Time!*

# Annex 6: Mentorship Reflection Questionnaire<sup>6</sup>

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## Instructions

This questionnaire asks about different aspects of your mentoring relationship. Answering the questions will help you learn about your mentorship relationship's strengths and weaknesses and about steps you can take to improve the collaboration. There are no right or wrong answers. Thoughtful and honest responses will yield the most valuable information. Please answer every question, and please check only one answer per question.

Each member involved in the mentoring relationship (both mentor and mentee) should respond to the questionnaire separately. It will take about 15 minutes to complete. The questionnaire allows you to express your opinions and provide information about your experiences anonymously. Do not write your name on the questionnaire; your name will not be attached to the responses you give.

Individual questionnaires from the mentor organization are then put together and discussed among individuals from the mentor organization to agree upon the overall results. Similarly, individual questionnaires from the mentee organization are put together and discussed among individuals from the mentee organization to agree upon the overall results. (Alternatively, the questionnaire may be scored at once through a group discussion, particularly if the organization is small.)

Mentor and mentee organizations will then come together to compare and discuss results. The purpose of this discussion is not to find fault or achieve a high score, but simply to celebrate where you both agree you are strong, make corrections where you both agree you are weak, and create deeper understanding where you disagree on results. The questionnaire is meant to help create a stronger and more effective mentoring relationship.

When completing the questionnaire:

- Be sure to read all the answer choices before marking your answer.
- Answer each question by placing a legible check mark or "X" in the box to the left of your answer.
- Return the completed questionnaire to your mentorship coordinator or bring it to a mentoring team discussion, as decided by the mentoring team.

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<sup>6</sup> Adapted from The Partnership Self-Assessment Tool, developed by the Center for the Advancement of Collaborative Strategies in Health.

## SYNERGY

Please think about the people and organizations that are participants in your mentorship.

**a.** By participating in the mentoring relationship, how well are mentees able to identify new and creative ways to solve problems?

EXTREMELY WELL  VERY WELL  SOMEWHAT WELL  NOT SO WELL  NOT WELL AT ALL

**b.** By participating in the mentoring relationship, how well are partners able to respond to the needs and problems of the constituent community?

EXTREMELY WELL  VERY WELL  SOMEWHAT WELL  NOT SO WELL  
 NOT WELL AT ALL

**c.** By participating in the mentoring relationship, how well are mentees able to implement strategies that are most likely to work in the community?

EXTREMELY WELL  VERY WELL  SOMEWHAT WELL  NOT SO WELL  
 NOT WELL AT ALL

**d.** By participating in the mentoring relationship, how well are mentees able to obtain support from individuals and organizations in the community that can either block the mentee's plans or help move them forward?

EXTREMELY WELL  VERY WELL  SOMEWHAT WELL  NOT SO WELL  
 NOT WELL AT ALL

**e.** By participating in the mentoring relationship, how well are mentees able to carry out comprehensive activities that connect multiple services, programs, or systems?

EXTREMELY WELL  VERY WELL  SOMEWHAT WELL  NOT SO WELL  
 NOT WELL AT ALL

### COMMENTS ON SYNERGY

## TRUST AND RESPECT

Please rate the effectiveness of the mentor's leadership in:

a. Fostering respect, trust, inclusiveness, and openness in the mentoring relationship

EXCELLENT  VERY GOOD  GOOD  FAIR  POOR  DON'T KNOW

b. Creating an environment where differences of opinion can be voiced

EXCELLENT  VERY GOOD  GOOD  FAIR  POOR  DON'T KNOW

c. Resolving conflict among partners

EXCELLENT  VERY GOOD  GOOD  FAIR  POOR  DON'T KNOW

d. Enhancing ownership by combining the perspectives, resources, and skills of partners

EXCELLENT  VERY GOOD  GOOD  FAIR  POOR  DON'T KNOW

e. Helping the mentees be creative and look at things differently

EXCELLENT  VERY GOOD  GOOD  FAIR  POOR  DON'T KNOW

### COMMENTS ON TRUST AND RESPECT

## EFFICIENCY

Please choose the statement that best describes how well the mentee uses the mentor's in-kind resources (e.g., skills, expertise, information, data, connections, influence, space, equipment, goods).

THE MENTEE MAKES EXCELLENT USE OF PARTNERS' IN-KIND RESOURCES.

THE MENTEE MAKES VERY GOOD USE OF PARTNERS' IN-KIND RESOURCES.

THE MENTEE MAKES GOOD USE OF PARTNERS' IN-KIND RESOURCES.

THE MENTEE MAKES FAIR USE OF PARTNERS' IN-KIND RESOURCES.

THE MENTEE MAKES POOR USE OF PARTNERS' IN-KIND RESOURCES.

## SOUTH-TO-SOUTH MENTORING TOOLKIT

Please choose the statement that best describes how well the mentor makes use of the mentees time.

] THE MENTEE MAKES EXCELLENT USE OF MENTOR'S TIME.

] THE MENTEE MAKES VERY GOOD USE OF MENTOR'S TIME.

] THE MENTEE MAKES GOOD USE OF MENTOR'S TIME.

] THE MENTEE MAKES FAIR USE OF MENTOR'S TIME.

] THE MENTEE MAKES POOR USE OF MENTOR'S TIME.

### COMMENTS ON EFFICIENCY

### COMMUNICATION AND COORDINATION

We would like you to think about the communication and coordination activities in your mentorship. Please rate the effectiveness of your mentorship in carrying out each of the following activities:

#### a. Coordinating communication among partners

] EXCELLENT  ] VERY GOOD  ] GOOD  ] FAIR  ] POOR  ] DON'T KNOW

#### b. Organizing mentorship activities, including meetings and projects

] EXCELLENT  ] VERY GOOD  ] GOOD  ] FAIR  ] POOR  ] DON'T KNOW

#### c. Minimizing the barriers to participation in the mentorship's meetings and activities (e.g., by holding them at convenient places and times, and by providing transportation and childcare)

] EXCELLENT  ] VERY GOOD  ] GOOD  ] FAIR  ] POOR  ] DON'T KNOW

#### d. Evaluating the progress and impact of the mentorship

] EXCELLENT  ] VERY GOOD  ] GOOD  ] FAIR  ] POOR  ] DON'T KNOW

### COMMENTS ON COMMUNICATION AND COORDINATION

**MUTUAL CONTRIBUTION**

A mentoring relationship needs both parties to contribute resources in order to work effectively and achieve goals. For each of the following, to what extent does your mentoring relationship have what it needs to work effectively?

**a.** Skills and expertise (e.g., leadership, evaluation, cultural competency, training, constituent organizing)

- ALL OF WHAT IT NEEDS     MOST OF WHAT IT NEEDS
- SOME OF WHAT IT NEEDS     ALMOST NONE OF WHAT IT NEEDS
- NONE OF WHAT IT NEEDS     DON'T KNOW

**b.** Data and information (e.g., statistical data, information about community perceptions, values, resources, and politics)

- ALL OF WHAT IT NEEDS     MOST OF WHAT IT NEEDS
- SOME OF WHAT IT NEEDS     ALMOST NONE OF WHAT IT NEEDS
- NONE OF WHAT IT NEEDS     DON'T KNOW

**c.** Connections to constituent key populations

- ALL OF WHAT IT NEEDS     MOST OF WHAT IT NEEDS
- SOME OF WHAT IT NEEDS     ALMOST NONE OF WHAT IT NEEDS
- NONE OF WHAT IT NEEDS     DON'T KNOW

**COMMENTS ON MUTUAL CONTRIBUTION**

**DECISION MAKING**

**a.** How comfortable are you with the way decisions are made in the mentoring relationship?

- EXTREMELY COMFORTABLE     VERY COMFORTABLE
- SOMEWHAT COMFORTABLE     A LITTLE COMFORTABLE
- NOT AT ALL COMFORTABLE

**b.** How often do you support the decisions made by the mentoring relationship?

- EXTREMELY COMFORTABLE     VERY COMFORTABLE
- SOMEWHAT COMFORTABLE     A LITTLE COMFORTABLE
- NOT AT ALL COMFORTABLE

**c.** How often do you feel that you have been left out of the decision-making process?

- EXTREMELY COMFORTABLE     VERY COMFORTABLE  
 SOMEWHAT COMFORTABLE     A LITTLE COMFORTABLE  
 NOT AT ALL COMFORTABLE

**COMMENTS ON DECISION MAKING**

**LEARNING**

For each of the following benefits, please indicate whether the mentee has or has not received the stated benefit as a result of participating in the mentoring relationship.

**a.** Enhanced ability to address an important issue

- YES     NO

**b.** Developed new skills

- YES     NO

**c.** Heightened its public profile

- YES     NO

**d.** Increased use of its expertise or services

- YES     NO

**e.** Acquired useful knowledge about services, programs, or people in the community

- YES     NO

**f.** Enhanced ability to affect public policy

- YES     NO

**g.** Development of valuable relationships

- YES     NO

## **SOUTH-TO-SOUTH MENTORING TOOLKIT**

**h.** Enhanced ability to meet the needs of key population constituents

YES  NO

**i.** Ability to have a greater impact than I could have on my own

YES  NO

### **COMMENTS ON LEARNING**

### **DRAWBACKS OF PARTICIPATION**

For each of the following drawbacks, please indicate whether or not you have or have not experienced the drawback as a result of participating in this mentorship.

**a.** Diversion of time and resources away from other priorities or obligations

YES  NO

**b.** Insufficient influence in mentorship activities

YES  NO

**c.** Viewed negatively due to association with other partners or the mentorship

YES  NO

**d.** Frustration or aggravation

YES  NO

**e.** Insufficient credit given to me for contributing to the accomplishments of the mentorship

YES  NO

### **COMMENTS ON DRAWBACKS OF PARTICIPATION**

## COMPARING BENEFITS AND DRAWBACKS

So far, how have the benefits of participating in this mentorship compared to the drawbacks?

- BENEFITS GREATLY EXCEED DRAWBACKS
- BENEFITS EXCEED DRAWBACKS
- BENEFITS AND DRAWBACKS ARE ABOUT EQUAL
- DRAWBACKS EXCEED BENEFITS
- DRAWBACKS GREATLY EXCEED BENEFITS

## SATISFACTION WITH PARTICIPATION

a. How satisfied are you with the way the people and organizations in the mentorship work together?

- COMPLETELY SATISFIED
- MOSTLY SATISFIED
- SOMEWHAT SATISFIED
- A LITTLE SATISFIED
- NOT AT ALL SATISFIED

b. How satisfied are you with your influence in the mentorship?

- COMPLETELY SATISFIED
- MOSTLY SATISFIED
- SOMEWHAT SATISFIED
- A LITTLE SATISFIED
- NOT AT ALL SATISFIED

c. How satisfied are you with your role in the mentorship?

- COMPLETELY SATISFIED
- MOSTLY SATISFIED
- SOMEWHAT SATISFIED
- A LITTLE SATISFIED
- NOT AT ALL SATISFIED

d. How satisfied are you with the mentorship's plans for achieving its goals?

- COMPLETELY SATISFIED
- MOSTLY SATISFIED
- SOMEWHAT SATISFIED
- A LITTLE SATISFIED
- NOT AT ALL SATISFIED

e. How satisfied are you with the way the mentorship is implementing its plans?

- COMPLETELY SATISFIED
- MOSTLY SATISFIED
- SOMEWHAT SATISFIED
- A LITTLE SATISFIED
- NOT AT ALL SATISFIED

## OVERALL COMMENTS ON THE PARTNERSHIP

# Annex 7: Mentorship Evaluation Form

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## Instructions

This template is for reflection on a mentoring relationship once it is coming to a close. Mentors and mentees should both complete the form and compare their responses.

1. Who were the mentors? \_\_\_\_\_

2. Who were the mentees? \_\_\_\_\_

3. How long have you been matched (years or months)? \_\_\_\_\_

4. What were the technical areas of focus for the mentorship?

- |   |   |
|---|---|
| <input type="checkbox"/> Peer Education                           | <input type="checkbox"/> Adherence              |
| <input type="checkbox"/> Peer Navigators/Peer Case Management     | <input type="checkbox"/> Networking             |
| <input type="checkbox"/> Social and Behavior Change Communication | <input type="checkbox"/> Community Mobilization |
| <input type="checkbox"/> Clinical Services                        | <input type="checkbox"/> Advocacy               |
| <input type="checkbox"/> Violence Prevention and Response         | <input type="checkbox"/> Resource Mobilization  |
| <input type="checkbox"/> Stigma and Discrimination                | <input type="checkbox"/> Strategic Planning     |
| <input type="checkbox"/> Other _____                              | <input type="checkbox"/> Financial Management   |

5. What were the main activities carried out during the mentorship? (Circle all applicable)

ON-SITE MENTORING   TWINNING   COMMUNITY OF PRACTICE   STUDY TOUR/SITE VISIT  
EXCHANGE VISITS   INTERNSHIP/SHADOWING   RESOURCE REFERRAL  
TELEMENTORING   PEER EXCHANGE/WORKSHOP EVENT

6. What was the original understanding about the intended outcome to be achieved?  
\_\_\_\_\_  
\_\_\_\_\_

7. Did this understanding change over time? If yes, how?  
\_\_\_\_\_  
\_\_\_\_\_

**SOUTH-TO-SOUTH MENTORING TOOLKIT**

8. Was the intended outcome achieved?

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9. On average, how many hours per month did you spend with your mentor/mentee?

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10. What has been the cost to date of the mentoring activity?

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11. What (if anything) are you doing differently since you have been engaged in this activity?

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12. Any other comments?

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13. Mentorship results:

BECAUSE OF OUR RELATIONSHIP, I THINK I (for mentees) / MY MENTEE (for mentors) ...	TRUE	FALSE	DID NOT NEED CHANGING (FINE TO BEGIN WITH)	DON'T KNOW
<b>Support</b> Feels that s/he has enough support to do work better				
<b>Empowerment</b> Feels he or she has more future options				
<b>Services</b> Feels he or she is able to provide better services to key populations				
<b>Constructive Use of Time</b> Is more effectively involved in more activities				
<b>Other Achievements</b>				

14. What do you think are the main benefits the mentee gained or learned from the relationship?

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15. What has the mentor gained or learned through the relationship?

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16. Has your relationship changed your attitudes, values, and understanding of your constituencies today and the realities facing them? If so, in what ways?

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17. What is easy about having a mentee? What worked well?

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18. What is hard about having a mentee? What didn't work?

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Mentor's Signature

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Mentee's Signature

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Date

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Date