

# *Beyond Our Borders*

## **A Guide to Twinning for HIV/AIDS Organizations**



Health Canada and Interagency Coalition on AIDS and Development (ICAD)

**Beyond Our Borders:  
A Guide to Twinning for HIV/AIDS Organizations**

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un guide de jumelage pour les organismes du domaine du VIH/sida**

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## Foreword

The dire predictions of the 1980s have become the reality of the 1990s. In many resource-poor countries, HIV/AIDS is having a devastating impact on communities previously little troubled by the epidemic and is strengthening its grip on places where it was already the leading cause of death among adults. HIV/AIDS is now widely recognized as the single greatest threat to sustainable development. For example, in sub-Saharan African countries, it has increased infant mortality and reduced life expectancy to levels not seen since the 1960s. Moreover, infant and child mortality rates are expected to double and even triple early in the next century.

HIV/AIDS is a global problem requiring a global solution. It does not recognize boundaries of nationality, gender, age, occupation or sexual preference. Like any infectious disease, HIV/AIDS will not be defeated anywhere until it is defeated everywhere.

Since the mid-1990s, there has been a surge of interest among activists in Canadian AIDS Service Organizations (ASOs) in broadening their knowledge of prevention, care, and treatment by participating in international forums. As well, a significant number of Canadian ASOs have either started working in HIV/AIDS internationally or have expressed an interest in doing so.

Most of the ASOs that contacted the Interagency Coalition on AIDS and Development (ICAD) indicated a desire to work directly with other community-based organizations in the most-severely affected countries. They wanted to participate in a way which would allow them to contribute to and learn from the work of their counterparts.

Initially, ICAD responded on an individual basis to the growing number of requests for information on how to facilitate "cross border" learning and action on HIV/AIDS. When we searched for existing resources to help the groups that approached us, we found that there was no single source of basic information on planning and implementing twinning projects. Given the increased interest, our limited resources and the obvious gap in easily accessible information on twinning, we decided to pull something together ourselves. *Beyond our Borders: A Guide to Twinning for HIV/AIDS Organizations* is the result of our efforts. It was developed by ICAD in collaboration with, and with financial support from, the International Affairs Directorate of Health Canada.

Though we are based in Canada, we believe that *A Guide to Twinning* will be a useful tool for HIV/AIDS organizations in other countries in both the "North" and "South." It is our hope that this guide will be useful and that it will be used often. We look forward to receiving your comments on the guide, and to hearing about your twinning experiences. We wish you all the best in your twinning endeavours.

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# *About This Guide*

This section explains how this guide was conceived, outlines the purpose of the guide, identifies the target audiences, describes the research methodologies used, and discusses how the guide is organized. It also includes a note on terminology.

## **Background**

The AIDS epidemic is a worldwide phenomenon. So, too, is the response to the epidemic, a response that is frequently led by community-based HIV/AIDS organizations. To mount an effective response, community-based organizations need to work with each other and with other stakeholders (including governments, health professionals and researchers).

Interactions between community-based organizations provide these organizations with opportunities to exchange information and experiences, and to improve their knowledge and skills. Although there is considerable interaction between community-based HIV/AIDS organizations at the local level, and sometimes at the national level, interaction at the international level has generally been limited to informal exchanges at conferences or through the Internet.

Recently, community-based HIV/AIDS organizations have expressed an interest in developing more formal links with their counterparts in other countries and have begun to develop such links. Organizations and individuals in the North have become more aware of international issues. They are learning more about the different realities of persons living with HIV/AIDS and vulnerable communities in the South. The first impulse of individuals and organizations in the North is often to want to help

people and communities in the South and to show solidarity with them. As they learn more about the situation, however, they realize that they can also learn from their Southern colleagues.

In light of these developments, the Interagency Coalition on AIDS and Development (ICAD), a Canadian non-governmental organization, concluded that a guide to twinning would be useful for community-based HIV/AIDS organizations that want to get more involved in international work.

Funding for this project was provided by the International Affairs Directorate of Health Canada as part of the Canadian Strategy on HIV/AIDS. The international collaboration component of the strategy supports a variety of initiatives designed to increase coordination of Canadian international HIV/AIDS activities, increase the skills and knowledge of Canadian non-governmental organizations (NGOs), and enhance collaboration among participating groups and individuals. Capacity building among Canadian NGOs interested in contributing to Canada's international HIV/AIDS work has been identified as a key component of Canada's strategy to combat HIV/AIDS.

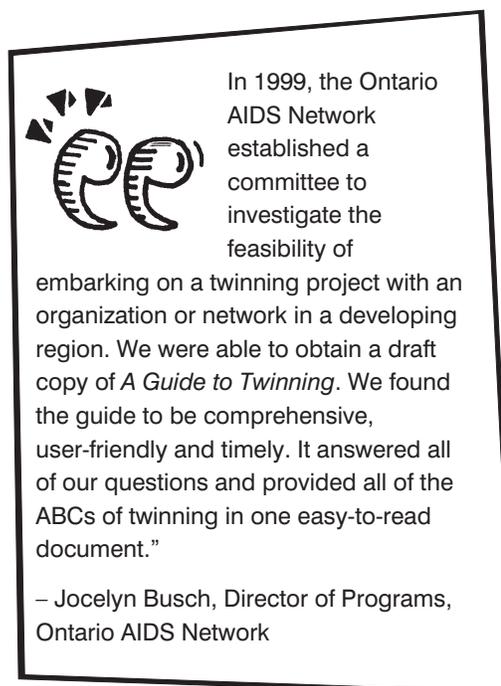
## Purpose of the Guide

The purpose of this guide is to enhance the ability of community-based HIV/AIDS organizations to undertake twinning with organizations in other countries.

The guide is a tool your organization can use to help you plan a twinning project. However, no single resource can answer all your questions. We encourage you to communicate with other organizations that have been involved in twinning projects. Some twinning projects are described in Section 1.4 *Examples of Twinning*. Contact information for people involved in these twinning projects can be found in Appendix III.

## Target Audiences

Community-based organizations working in HIV/AIDS constitute the primary target audience for this guide.



Because the basic principles of twinning are applicable in many different settings, this guide should also be useful to other NGOs working in HIV/AIDS and to community-based organizations and NGOs working in other fields.

This guide has been written primarily from the perspective of organizations in the North. However, much of the content will still be applicable to organizations in the South that want to become involved in twinning.

## Research Methodologies

The following methodologies were utilized in the research undertaken for this guide:

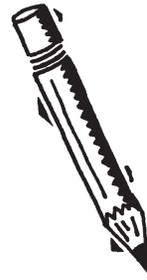
- Searches were conducted in the literature and on the Internet for information on existing twinning programmes.
- Requests for information were posted on several HIV/AIDS-related Internet discussion forums.
- The snowball technique was used to identify additional sources of information – i.e., personal contacts invariably led to additional contacts; and websites often contained links to other websites.
- An editorial committee, composed of persons with experience in twinning programmes, was established to provide feedback on the outline and drafts of the guide.

## How the Guide is Organized

The guide is divided into four chapters. The following is a description of the contents of these chapters.

### Chapter I – Introduction to Twinning

This chapter defines twinning within the continuum of interactions among organizations. It outlines the benefits of twinning, describes the different forms of twinning and lists several examples of past or current twinning projects.



### *We need your feedback*

This is the first time that a how-to guide on twinning has been attempted for an audience of community-based HIV/AIDS organizations. In fact, during the research conducted for this guide very little documentation was found on how to do twinning. The guide has been prepared by talking to people who have been involved in twinning projects and by striving to capture their experiences and expertise. Because it is a first effort, the guide is not exhaustive. ICAD would like to receive feedback from readers. Please write to us about your experiences with twinning and about the lessons you have learned. Please send us copies of any evaluations of twinning projects that you conduct. And please provide us with comments on this guide. We hope to be able to incorporate your comments in future editions of the guide. Please see the section entitled *Invitation to Comment on This Guide* following Chapter 4.

## **Chapter 2 – Lessons Learned from Existing Twinning Projects**

This chapter discusses the prerequisites of twinning – i.e., the conditions that should be present before an organization takes on a twinning project. It describes the characteristics of successful twinning, explains the advantages of twinning being two-way (i.e., benefiting both organizations involved), and identifies several challenges associated with twinning projects.

## **Chapter 3 – Bridging Cultural Differences**

This chapter describes some of the cultural issues that can arise in international twinning projects, including issues around intercultural understanding and communications, North-South dynamics, and language.

## **Chapter 4 – How to Make Twinning Happen – A Step-By-Step Guide**

The last chapter explains how your organization can get involved in a twinning project. A step-by-step format is used for the first two sections of the chapter: the exploration stage and the planning stage. This is followed by information to help your organization implement and evaluate twinning projects.

In addition, there is a section at the end of Chapter 4 inviting readers to provide ICAD with feedback on the guide.

Finally, there are a number of appendices. The appendices provide additional information on several topics. Included are a list of the publications cited in the guide; a list of resources on intercultural issues; contact information on twinning projects; information on two programmes that facilitate twinning; a list of HIV/AIDS e-mail discussion forums that can be used to search for twinning partners; and a sample partnership agreement used in one particular twinning project.

## **Terminology**

This guide uses the terms “North” and “South” to designate, respectively, high income (or developed) countries and resource-poor (or developing) countries.

The term “partner” is used in this guide to refer to either of the two organizations involved in a twinning relationship.

There are different types of twinning. They are defined in Section 1.3 *Forms of Twinning*.



# *Introduction to Twinning*

## **Introduction**

Twinning is not a new concept. It has been around for generations. Most readers will be familiar with examples of city-to-city twinning. However, in the HIV/AIDS movement it is a relatively new phenomenon. This chapter provides an introduction to twinning. It includes:

- an explanation of what twinning is;
- an overview of the benefits of twinning;
- a description of the different forms of twinning; and
- some examples of twinning.

## What Is Twinning?

Organizations working in HIV/AIDS interact with each other on many different levels. Some examples of this interaction are:

- one organization referring clients to another organization;
- organizations participating in a formal or informal network or coalition;
- people from one organization talking to people from other organizations at national, regional and international conferences;
- one organization contacting another for specific information or for a copy of a resource;
- a mentor organization imparting knowledge or skills to a younger, smaller or newly-formed organization;
- two (or more) organizations working together on a particular project;
- exchanges of personnel between organizations to improve knowledge or skills.



### *Linking vs twinning*

Some people may equate the term “linking” with twinning. Sometimes, however, linking can mean something quite different, such as when organizations are linked together through membership in a network or coalition.

These interactions can be formal or informal. They can be one-time or they can last for an extended period of time. They are critical to the success of the work HIV/AIDS organizations do because they enable vital information to be exchanged and they create opportunities to work together.

Twinning occupies a particular place on this continuum of interactions. There is no set definition for twinning. The term is used in many ways; it means different things to different people. The following working definition has been developed specifically for this guide:

***TWINNING IS A FORMAL, SUBSTANTIVE COLLABORATION BETWEEN TWO ORGANIZATIONS.***

“**Formal**” means that there is an agreement or contract, verbal or written.

“**Substantive**” means that the interaction is significant and that it lasts for a period of time (i.e., it is not just a one-time interaction, such as a telephone call asking for information).

**“Collaboration”** means that the two organizations work together on a specific project or to exchange information or skills.

Ideally, twinning should be two-way – i.e., both organizations benefit from the collaboration and learn from each other. (For a more detailed discussion of this, see Section 2.3 *Advantages of Two-Way Twinning*.)

However, some relationships that appear to be one-way, such as mentoring relationships, still meet the definition of twinning provided above. Mentoring usually involves a mature organization assisting a younger organization. Although a mentoring relationship may appear to benefit mainly the younger organization, the mature organization gains the satisfaction of lending a helping hand and may realize other benefits as well. For example, through the mentoring relationship, the mature organization might gain exposure to the culture of a population that it serves in its own country (i.e., an immigrant population). Or the mature partner may find to its surprise that it can learn something from the younger partner, as several organizations from the United States discovered in a twinning project with organizations from the Caribbean. (For a discussion of this point, see Section 2.3 *Advantages of Two-Way Twinning*. For a description of this project, see Section 1.4 *Examples of Twinning*.)

For the purposes of this guide, it is assumed that the two organizations involved in a twinning project are from different countries. This does not mean that twinning cannot occur between two organizations in the same country; much of the content of this Guide is applicable to twinning within the same country.

Furthermore, for the purposes of this guide, it is assumed that twinning projects will involve an exchange of personnel between the two organizations and that the organizations will therefore incur additional costs to cover staff time and travel. There may be other costs as well (such as long distance, office space, computer equipment and materials). It may be technically possible to design a twinning project without any additional costs, but this would be difficult to achieve and probably would not produce the desired results.

***Does a twinning project have to be limited to two organizations?***



By definition, the words “twin” and “twinning” refer to exactly two persons or things. In practice, however, in the context of organizational twinning, it is possible to have a formal collaboration among three (or more) organizations that meets the definition of twinning included in this guide. Because this is an unusual occurrence, the text in the guide is based on the assumption that only two organizations will be involved.

It should also be noted that even in twinning projects involving two organizations, a third party sometimes plays a role in bringing the organizations together or in helping to fund the project.

## Benefits of Twinning

Why should an organization consider twinning? The potential benefits of twinning include the following:

- **CAPACITY BUILDING.** Twinning can help strengthen the organizations involved through a transfer of skills and knowledge. This, in turn, can lead to improved policy analysis and service delivery.
- **IDENTIFICATION OF BEST PRACTICES.** Twinning provides opportunities to identify policies, techniques and interventions that have worked and to spread the word about them. This helps organizations avoid re-inventing the wheel.
- **INCREASED PROGRAMME EFFECTIVENESS.** Where the twinning involves collaborating on a specific initiative, it usually results in stronger and more effective programmes.
- **BROADENING OF OUR HORIZONS.** Twinning can help us to become less insular and more outward looking; to break down barriers; to understand new cultures; and to learn about how the epidemic is affecting other parts of the world.
- **RELATIONSHIP BUILDING.** Twinning can help build stronger relationships among HIV/AIDS organizations. These relationships become important when an organization has a need and can turn to the partner organization for assistance, or when opportunities arise for organizations to work together to address a specific issue.
- **NETWORKING.** Twinning can contribute to greater networking through the snowball effect – i.e., both organizations involved in the twinning project are exposed to each other’s existing (mostly local) networks.

*In brief:*

### *The benefits*



- Capacity building
- Identification of best practices
- Increased programme effectiveness
- Broadening of our horizons
- Relationship building
- Networking
- Solidarity
- Building of a global movement

- **SOLIDARITY.** Twinning helps to create a feeling of belonging to a larger community, a worldwide family. As well, organizations involved in twinning are often inspired by the work of their partners. This, in turn, can help to empower people to fight for their rights and for adequate services for HIV/AIDS-affected communities.
- **BUILDING OF A GLOBAL MOVEMENT.** NGO twinning can play an important role in building an inclusive, culturally-relevant and successful global movement to respond to HIV/AIDS. This is important not only because HIV/AIDS is a worldwide phenomenon, but also because globalization is increasingly affecting HIV/AIDS policy formulation, funding and programme development.

## Forms of Twinning

Twinning can take many different forms. Activities within a twinning project generally fall into four main categories: training exchanges, information exchanges, technical exchanges and collaborations on specific initiatives. Each category is described below. Please note that twinning projects often involve more than one form of twinning.

■ **TRAINING EXCHANGES.** These involve one or more persons from one organization visiting the partner organization for a period of time to learn or impart information and skills. Training exchanges can involve internships, on-site training or study tours.

- **Internships** provide people with the opportunity to work in another organization to gain practical experience and exposure to the different ways in which that organization structures and carries out its work. Internships can be one-way (people from one organization visit the partner organization) or two-way (the two organizations exchange personnel, either at the same time or at different times). The training can be part of the host organization's regular training or it can be specifically tailored to the needs of the visiting persons. The internship can be short-term (e.g., 2-3 weeks) or longer-term (e.g., six months). In some internships, the visiting persons will temporarily fill positions in the host organization.
- **On-site training** occurs when a person from one organization who is experienced in a specific aspect of HIV/AIDS work is invited to provide training to the partner organization's staff, board members, or volunteers at the locale of the partner organization.
- **Study tours** involve the visiting person or persons touring several HIV/AIDS organizations in the area (including the host organization) for the purpose of providing or receiving training.

*In brief:*  
**The forms  
of twinning**



- Training exchanges
  - internships
  - on-site training
  - study tours
- Information exchanges
- Technical exchanges
- Collaboration on specific initiatives

■ **INFORMATION EXCHANGES.**

These are similar to training exchanges in that they involve people from one organization visiting the partner organization, but the visits are limited to an exchange of information and do not involve formal training. As with the training exchanges, information exchanges can be one-way or two-way and can involve study tours.

- **TECHNICAL EXCHANGES.** These involve people from one organization travelling to the partner organization to help implement a specific programme or activity. The visiting persons may temporarily fill positions in the host organization (similar to internships).

- **COLLABORATION ON SPECIFIC INITIATIVES.** This involves two organizations agreeing to work together to establish a particular programme or to address an issue that affects them both.

Twinning projects are sometimes organized along lines of affinity – e.g., language, culture, client populations, methods of interventions, shared issues. As well, twinning arrangements can be constructed as formal partnerships (see AIDS Law Project – Canadian HIV/AIDS Legal Network Partnership in Section 1.4 *Examples of Twinning*).



***Types of activities***

There is no limit to the types of activities that can be selected for a twinning project. For

collaborations on specific initiatives, obviously the types of activities will depend on the particular initiative. For training, technical and information exchanges, the types of activities could include any of the following:

- assistance in the development of care and prevention strategies;
- assistance in the development of legal, ethical and human rights initiatives;
- assistance in the development and strengthening of a formal network;
- assistance in the development of educational materials;
- assistance in policy development and advocacy;
- workshops to strengthen communications skills;
- workshops to strengthen fundraising skills;
- workshops to strengthen management skills such as strategic planning, change management, time management and project management;
- workshops on community-based research principles and techniques;
- workshops on board of directors development; and
- training and technical assistance on how to use research to improve the delivery of care and prevention services and to assess the effectiveness of these services.

This list is not exhaustive.

## Examples of Twinning

This section contains brief descriptions of several past and current twinning projects. To obtain more details on these projects, please refer to the contact information in Appendix III. The research conducted for this guide identified two organizations that are actively promoting twinning and helping to facilitate twinning projects: The Institute of International Education and the European Council of AIDS Service Organizations. Each organization has established a stand-alone twinning programme. These programmes are described (complete with contact information) in Appendix IV.

### **AIDS Law Project – Canadian HIV/AIDS Legal Network Partnership**

The AIDS Law Project, based in South Africa, and the Canadian HIV/AIDS Legal Network signed a formal partnership agreement which calls for the two organizations to work together to improve awareness and understanding of the legal, ethical and human rights impact of the global spread of HIV/AIDS; to promote regular communication between both organizations at both management and operational levels; and to undertake joint activities in the areas of research, publications, the creation and support of networks, conferences, and other educational activities.

The agreement calls on the partners to promote the partnership within their respective organizations and to integrate the partnership into their workplans. It also envisages personal contact between staff from the two organizations. To keep costs down, contact will often occur at international HIV/AIDS meetings. At

#### *In brief:* **Examples**



- AIDS Law Project – Canadian HIV/AIDS Legal Network Partnership
- Ain O Salish Kendra – Task Force Detainees
- Areas of Affinity Initiative
- Hemophilia Foundation Victoria – Hemophilia Association of the Philippines for Love and Services
- Kenya Human Rights Commission – Network of Independent Monitors
- People’s Institute for Participatory Action Research – Various Organizations
- Spolecnost AIDS Pomoc – Helseutvalget for homofile
- The United States-Venezuela Air Bridge
- Union des municipalités du Québec – Asociación Chilena de Municipalidades
- Women’s Centre for Peace and Development/Women’s Rights Project of the Civil Liberties Organization – International Federation of Women Lawyers

the time of writing of this guide, this project had just been launched. See Appendix VI for a copy of the partnership agreement.

This is an example of a collaboration on specific initiatives.

## **Ain O Salish Kendra – Task Force Detainees**

Under the auspices of the International Human Rights Internship Program, Md. Asaduzzaman, an activist from Ain O Salish Kendra, a legal aid organization in Dhaka, Bangladesh, that works on cases of political detainees, ethnic minorities and child prisoners, spent two months with Task Force Detainees in the Philippines observing its work and enhancing his skills in human rights fact-finding and documentation. This project has been completed.

This is an example of a training exchange involving an internship.

## **Areas of Affinity Initiative**

Under the auspices of Family Health International, five formal exchanges were organized in 1995 between United States and Caribbean NGOs working with similar client populations. The Caribbean NGOs were from Haiti and Dominican Republic. The twinnings consisted of: Volontariat de Développement Haitien (Port-au-Prince) and CASPAR Alcohol and Drug Education Program (Somerville, Massachusetts), both working with youth populations; Save the Children (Port-au-Prince) and Iris House (New York City), both working with poor women; Coordinadora de Animación Socio-Cultural (Santo Domingo) and Alianza Dominicana (New York City), both working with youth; Centro de Orientación e Investigación Integral (Santo Domingo) and Latino Health Institute (Boston), both doing broad community-based programming; and Haitien Center for Social Services (Port-au-Prince) and the HIV/AIDS Risk Reduction Program of the Palm Beach County Public Health Unit (Belle Glade, Florida), both working with youth.

The initiative consisted of four components: (1) a workshop involving all participating NGOs where at breakout sessions on prevention programming numerous common issues were identified and the partner organizations were introduced; (2) attendance at an HIV/AIDS prevention conference in Washington, DC, United States, which allowed more time for partners to interact and learn about each other; (3) site



Our twinning project with the AIDS Law Project (ALP) has allowed us to undertake activities that we could not have done alone. For example, we are jointly organizing a satellite meeting on legal, ethical, and human rights issues raised by HIV/AIDS at the XIIIth International Conference on AIDS in Durban, South Africa in 2000. We are also planning joint publications. We have been learning a lot from ALP. Their work has been an inspiration. We are committed to working together, and to help each other achieve our respective missions, goals and objectives.”

– Ralf Jürgens, Executive Director,  
Canadian HIV/AIDS Legal Network

visits by the Caribbean NGOs to their U.S.-based partner organizations; and (4) site visits by the U.S.-based partners to their Caribbean counterpart organizations. During the site visits the partners interacted both with the NGO staff as well as with the client populations.

These exchanges resulted in mutual sharing of practical prevention materials and innovative intervention strategies. They also provided opportunities for on-site, informal staff training to enhance work with the partner organizations' common client populations. The partners identified a number of areas for on-going collaboration. These include staff/peer educator exchanges, continued materials sharing, and the establishment of "bridging" programming to link families whose members are affected by HIV/AIDS but separated by immigration, or to ensure continuity of prevention programming for migrant labourers between their home and U.S. employment bases. The project is completed.

This is an example of a project that involves both training exchanges and information exchanges.

## **Haemophilia Foundation Victoria – Hemophilia Association of the Philippines for Love and Services**

The Haemophilia Foundation Victoria (HFV), in Australia, and the Hemophilia Association of the Philippines for Love and Services (HAPLOS) formalized a twinning partnership during a visit in 1999 by two HFV delegates to the Philippines. The two organizations agreed to a set of working priorities and developed a joint three-year action plan. At the time of the writing of the guide, the action plan had yet to be formally adopted. The organizations plan to exchange information on administration and programming. HFV plans to provide assistance to HAPLOS on developing e-mail communications, setting up an office, investigating sources of funding, developing information materials and organizing a conference.

This is an example of a project that involves both information exchanges and technical exchanges.

## **Kenya Human Rights Commission – Network of Independent Monitors**

In April 1999, the Kenya Human Rights Commission (KHRC) sent two people to South Africa for a month to work with the Network of Independent Monitors (NIM) on issues around elections, violence and voter education. Bridget Mora of the Commission and Githuku Ndungi, a member of Release Political Prisoners, a Kenyan NGO, observed the national election in South Africa and shared information with NIM staff on how they conduct voter education training workshops in Kenya. They also provided information on how to incorporate the issue of gender into voter education and how to use theatre as a means of training people on human rights issues. Two persons from NIM were scheduled to visit Kenya at the end of 1999.

This exchange is part of the Informal Repression Project, which was initiated by Article 19, an organization that opposes censorship and works to protect and promote freedom of expression. The goal of the project is to monitor and document examples of informal repression in Africa. Informal repression is a strategy used by a number of governments in Africa to silence or split groups opposed to its policies. Three organizations are participating in the project: KHRC, NIM and the Civil Liberties Organization in Nigeria. One of the outcomes of the project is a training manual that was written jointly by representatives of the three organizations.

Article 19 says that it sends two people from the same country whenever possible because people are more productive in pairs and because this minimizes the burden on the hosting organization to take care of visitors outside of working hours.

This is an example of an information exchange.



## **People’s Institute for Participatory Action Research – Various Organizations**

Under the auspices of the International Human Rights Internship Program, Minati Padhi and Sanjukta Satapathy, two staff persons from The People’s Institute for Participatory Action Research, an organization that works to improve the situation of women and children in India, visited women’s rights organizations in Thailand and the Philippines. The visits, which lasted two weeks in each country were designed to enable the visitors to learn more about publicity and media work, campaigning, mobilizing legal support and reporting for domestic and international audiences. This project has been completed.

This is an example of an information exchange involving study tours.

## **Spolecnost AIDS Pomoc – Helseutvalget for homofile**

Under the auspices of the EuroCASO Twinning Programme, Spolecnost AIDS Pomoc (SAP), from Poland, and Helseutvalget for homofile, the Norwegian Gay Health Committee (NGHC), exchanged site visits. Rolf Tore Thomassen, from NGHC, and Zdenek Kurka, from SAP, spent a week visiting their partner organizations and other organizations in the host cities to learn about their care and prevention activities.

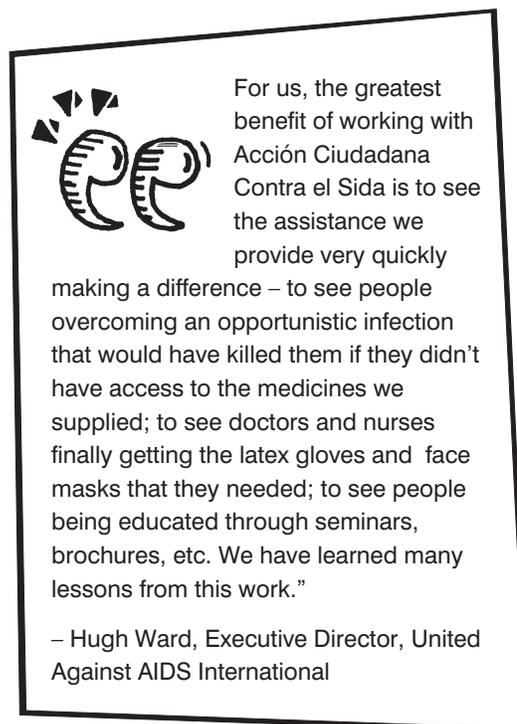
Both organizations also exchanged materials (posters, brochures, T-shirts, etc.). This project has been completed.

This is an example of an information exchange.

## **The United States-Venezuela Air Bridge**

United Against AIDS International (UAAI), based in New York, and Acción Ciudadana Contra el Sida (ACCSI), based in Caracas, have set up a twinning project, the main focus of which is a distribution pipeline to transport surplus HIV/AIDS medications and other medical supplies from the United States to Venezuela. The pipeline has enabled about 2,000 people in Venezuela to access life-saving medications. UAAI has also provided assistance with the development of an educational brochure and with fundraising to help finance projects in Venezuela. At the time of writing of this guide, this project was ongoing.

This is an example of a collaboration on specific initiatives.



## **Union des municipalités du Québec – Asociación Chilena de Municipalidades**

Under the auspices of the Federation of Canadian Municipalities, two umbrella organizations, the Union des municipalités du Québec (UMQ), in Canada, and the Asociación Chilena de Municipalidades (AChM), in Chile, collaborated on the development of a training programme on modern management principles. The programme addressed issues such as organizational analysis, financial and human resources management, evaluation of services, and sharing of information. The training programme was conducted in Québec for 20 Chilean municipal employees. UMQ also participated in an international conference in Chile on natural disasters and crises. The collaboration between UMQ and AChM has led to the development of additional twinning projects between individual municipalities in Québec and Chile. At the time of the writing of this guide, the UMQ-AChM project was ongoing.

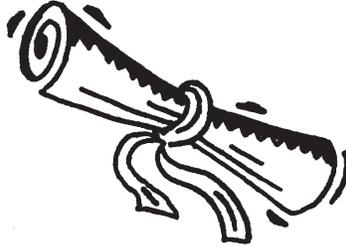
This is an example of a project that involves both a training exchange and an information exchange.

## **Women’s Centre for Peace and Development/Women’s Rights Project of the Civil Liberties Organization – International Federation of Women Lawyers**

Under the auspices of the International Human Rights Internship Program, Theresa Akumadu, Chairperson of the Executive Committee of the Women’s Centre for Peace and Development, in Nigeria, and head of the Women’s Rights Project of the Civil Liberties Organization in that same country, spent two months as a trainer assisting the International Federation of Women Lawyers in Kenya. The purpose of her visit was to enhance the Federation’s capacity to conduct investigations into abuses of women’s rights, and to apply international human rights standards to monitoring and assessing state and private sector accountability for abuses. This project has been completed.

This is an example of a training exchange involving on-site training.





# *Lessons Learned from Existing Twinning Projects*

## **Introduction**

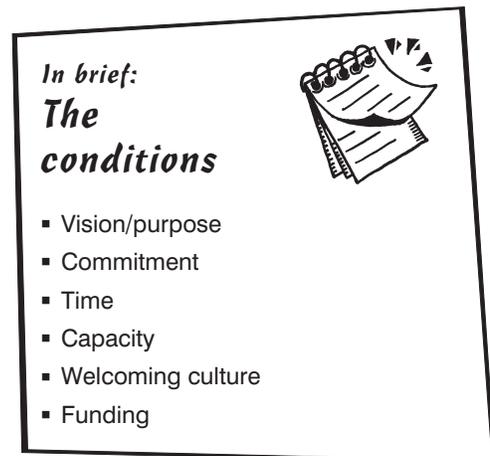
There is much that we can learn from past and current twinning projects. This chapter contains:

- a discussion of the conditions that should be present before an organization decides to get involved in twinning;
- an analysis of the characteristics of successful twinning;
- information on the advantages of two-way twinning; and
- a description of some of the challenges organizations may face when putting together a twinning project.

## Conditions that Should be Present Before an Organization Embarks on a Twinning Project

How do you know if your organization is ready to take on a twinning project? The following is a list of prerequisites – i.e., conditions that should be in place before you consider twinning.

- **VISION/PURPOSE.** Your organization needs a clear sense of why it is embarking on a twinning project – i.e., what it thinks it can contribute to it and what it thinks it can get out of it. For example, you may feel that twinning will expose you to new ideas for care or prevention interventions and that you would like to share your experience in these areas with others. The importance of having at least one clear purpose for engaging in twinning cannot be overstated. The intensity of this purpose will have a significant impact on whether, commitment, resources, time and funding are made available for the twinning project (and whether they are adequate).
- **COMMITMENT.** There needs to be a strong desire within your organization to embark on a twinning project. Your organization has to be willing to learn and to share. There should be support for twinning at all levels: board of directors, staff and volunteers. Ideally, "sharing experience" is included as a central part of your organization's mission statement.
- **TIME.** Your organization has to be prepared to devote the time necessary to make twinning work. Twinning is labour-intensive. There is no quick and easy way to do successful twinning.
- **CAPACITY.** Your organization needs to have the capacity to take on a twinning project. If you are stretched to the limit now, you will need to figure out how you can incorporate the additional work a twinning project would entail.



- **WELCOMING CULTURE.** The culture of your organization has to be welcoming to people coming in from the outside.
  
- **FUNDING.** Twinning will involve additional expenses for your organization, particularly for travel. To cover these costs, either funds will need to be found within your organization or an external source of funding will need to be identified.

You may want to conduct a formal assessment of your organization to determine if it is ready for twinning.

## Characteristics of Successful Twinning

The following characteristics of successful twinning have been drawn from experience with past and current twinning projects.

- **WIN-WIN.** For twinning to be successful, there must be value added for both organizations. In other words, it must be a win-win situation.
- **COMPATIBILITY.** Your chances of success are much greater if there is good compatibility between the organizations. To ensure good compatibility:
  - There should be a similarity of experiences, concerns, interests, approaches and activities.
  - Both organizations should share an understanding and respect for each other's cultural norms and values, limitations and expectations.

Ideally, both organizations will be at a similar level of maturity.

- **MATURITY.** Twinning works best when both organizations have reached a level of organizational maturity that allows them to absorb a twinning project. For twinning to succeed, considerable staff time will need to be devoted to it and at least some infrastructure will need to be in place.
- **REALISTIC EXPECTATIONS.** It is important to keep expectations in check. The activities included in the twinning project should be do-able within available resources and time frames.
- **NEEDS DRIVEN.** Although there must be a good match between the needs and capacities of the two organizations, the project should be driven primarily by the needs of each organization. In other words,

*In brief:*  
**The  
characteristics**



- Win-win
- Compatibility
- Maturity
- Realistic expectations
- Needs driven
- Clear, narrow focus
- Funding
- Leadership
- Good planning
- Monitoring and evaluation
- Flexibility
- Good communications
- Cultural sensitivity

it is important to identify the needs and to find ways of addressing these needs, as opposed to identifying a skill set and then finding someone to teach it to.

- **CLEAR, NARROW FOCUS.** In any learning situation, the more narrow the focus, the better. It is also important that the focus be clear and precise because this tends to indicate that the organizations have a well-thought-out sense of themselves and their needs and capacities.
- **FUNDING.** Funding needs to be made available or confirmed early in the process, and needs to be adequate.
- **LEADERSHIP.** Twinning projects are more successful when specific individuals in each organization take the lead. Often the best projects are those initiated by committed individuals from both organizations who already know each other.
- **GOOD PLANNING.** Good planning upfront is essential. For example:
  - Considerable time needs to be spent at the outset determining what each organization can learn from the other. This means lots of research, good pre-planning and good communications between the organizations.
  - Each organization needs to conduct needs and capacity assessments.
  - Sufficient time needs to be built in to allow relationships between the two organizations to mature.
  - Goals and objectives need to be clearly spelled out and a workplan needs to be developed. This is one way to ensure that the organizations are serious about their role and have given a lot of thought to their respective needs and capacities.
- **MONITORING AND EVALUATION.** Setting objectives during the planning process will help to make sure the twinning project is results-based. It is also important, however, to establish indicators of success, to monitor the project on an ongoing basis, and to evaluate the project at the end or at selected intervals.
- **FLEXIBILITY.** The two organizations have to be prepared to make adjustments along the way. A flexible, step-by-step approach to planning and implementation is preferable to a fixed blueprint strategy. This is particularly important for organizations embarking on their first twinning project.



***Needs and capacity assessments***

See Step #2 in Section 4.1 *Exploration Stage* for a description of what needs and capacity assessments involve.

- **GOOD COMMUNICATIONS.** A good flow of information between the two organizations is critical to the success of the twinning project. Communications issues can arise in the planning stage (e.g., adequately communicating needs and capacities) and in the implementation stage (e.g., articulating problems in a constructive manner).
- **CULTURAL SENSITIVITY.** It is important to ensure that any training or information activities that are part of the twinning project are tailored to the cultural realities of the recipient individual or organization. See Section 3.1 *Intercultural Understanding and Communications* for a discussion of cultural issues.



## **Communications**

Here are some tips for how to maintain good communications with your partner organization:

- Set up a system of communications at the beginning of the twinning partnership and identify the responsibilities each participant has for communications.
- Review the communications system regularly and be prepared to make changes.
- Take into account the fact that the two organizations may have different communications styles.
- Acknowledge that problems in communications will occur and that the problems themselves must be communicated.
- Do not rely too much on the paper process; get to know each other.

– Adapted from *Collaboration: What Makes It Work*, by Paul W. Mattessich and Barbara R. Monsey. Please see Appendix I for more information on this resource.

## Advantages of Two-Way Twinning

NGOs involved in training and technical exchanges and other forms of twinning report that the most successful twinning projects are those that are two-way – i.e., each organization learns from the other. Two-way twinning is empowering to both organizations. If the learning is all one-way or mostly one-way, the twinning is not well balanced. Some North-South twinning, where the Northern partners see themselves as the "experts," are particularly susceptible to a lack of balance.

The following anecdotes illustrate the value of two-way twinning:

- In one project involving a conference organized by groups from the United States and South Africa, organizers found that because the United States participants did not consider themselves experts, and were there to learn, the South African participants were more ready to share.
- The International Human Rights Internship Program (IHRIP) found that when interns were posted with host organizations to learn, they were still able to provide new perspectives and observations to the host organizations. For example, when interns were included in discussions about an organizational problem or a policy issue, they were often able to provide insight as to how their organizations were able to address a similar situation. This was possible because IHRIP made a practice of sending experienced activists as interns.
- In one project involving organizations from the United States and the Caribbean, there was initially a sense that the organizations from the United States would not have much to learn from their counterparts in the Caribbean and that they would be the one doing the teaching. The organizations from the United States were surprised to find that their counterparts had innovative and advanced techniques for HIV/AIDS prevention education, techniques that had not yet been applied to target populations in the United States.
- The Federation of Canadian Municipalities (FCM) has a programme that links Canadian municipalities with local governments in the South. Although Canadian municipalities have demonstrated their expertise in many areas of municipal management and governance, the FCM programme does not send Canadian "experts" to tell their counterparts what they should do. Instead, FCM encourages partners to share their successes, learn from one another, and cooperate in developing concrete and adaptable solutions for the problems their municipalities face.

- Even when the travel is one-way – for example, when an organization sends someone to a partner organization to conduct training – the learning can still be two-way. In addition to imparting information to the host organization, the trainer can learn and take home information about the approaches and strategies used by the host organization.

## Challenges

There are many hurdles your organization may encounter on the road to designing and implementing a successful twinning project. The following is a list of the more common obstacles reported by organizations involved in twinning, along with suggestions for overcoming some of them.

- **FINDING THE RIGHT PARTNER.** For some organizations, finding the right partner will be the biggest hurdle they face. See Section 4.1 *Exploration Stage* for some tips on locating a partner.
- **SUSTAINABILITY.** You may start a twinning project but then discover that it is difficult to keep it going. Often, this is because of insufficient funding. Ideally, you should secure funding for the entire project at the outset. If this is not possible, and if you start the project anyway, you should start looking for additional funding well before your initial funding runs out.
- **LACK OF APPROPRIATE INFRASTRUCTURE.** Most HIV/AIDS organizations do not have an established infrastructure for hosting people for training. In other words, they do not have an organized approach for training people from other organizations. If this is your organization's first foray into this type of twinning, you will need to spend considerable time planning how you are going to conduct the training.
- **MORE PRESSING PRIORITIES.** Sometimes an organization may become involved in a twinning project, and may want to continue participating, but finds that it needs to devote all of its energies to the survival of its regular programmes. In these circumstances, ending or temporarily suspending the twinning relationship may be the best course of action. (When you undertake a twinning project, if the two organizations have decided to draw up a formal agreement you should consider including a clause about pulling out if circumstances change suddenly.)

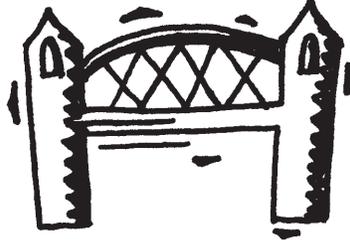
*In brief:*

### *The challenges*



- Finding the right partner
- Sustainability
- Lack of appropriate infrastructure
- More pressing priorities
- Lack of flexibility
- Exchange fluctuations and inflation rates
- Conflict resolution
- Culture clash

- **LACK OF FLEXIBILITY.** The initial contract or agreement can turn out to be a source of misunderstanding and disagreement because it is usually difficult to anticipate all future problems. This underscores the importance of remaining flexible and of being prepared to modify the initial agreement and workplan as the project proceeds.
- **EXCHANGE FLUCTUATIONS AND INFLATION RATES.** Organizations involved in twinning projects may need to be sensitive to the effects of currency fluctuations, particularly in situations where one organization is providing funding to the other. In recent years, some countries in the South have experienced sudden and dramatic drops in the value of their currencies. As well, many of these countries have experienced high inflation rates. Inflation can reduce the purchasing power of any funds they receive.
- **CONFLICT RESOLUTION.** While not all organizations involved in a twinning project experience conflict, it can happen and may have to be dealt with. Please see Section 4.5 Dealing with Conflict for a brief description of what conflict can entail and how it can be handled.
- **CULTURE CLASH.** When two organizations from different cultures get involved in a twinning project, the differences in culture can represent an obstacle to success. For information on cultural differences and how to deal with them, see Chapter 3 *Bridging Cultural Differences*.



# *Bridging Cultural Differences*

## **Introduction**

If your organization is considering entering into a twinning relationship with an organization from another country, you need to be aware of potential cultural differences. This chapter describes these differences and offers some strategies for dealing with them. The chapter includes:

- an overview of intercultural understanding and communications;
- an analysis of some of the dynamics that affect North-South partnerships;
- a discussion of language differences; and
- a list of the factors that may influence your choice of intra-regional or inter-regional twinning.

## Intercultural Understanding and Communications

Twinning projects often involve organizations from different cultures. This section, which has been prepared especially for this guide by the Centre for Intercultural Learning, Canadian Foreign Service Institute, is intended to provide an introduction to the intercultural challenges your organization may face in the course of twinning, and to put forward suggestions for addressing cultural differences.

If you are planning to undertake twinning projects with an organization in another culture, you should conduct additional research. There are many useful resources available, some of which are listed in Appendix II. Contact information for the Centre for Intercultural Learning can also be found in Appendix II.

### What is Culture?

The Wordsmyth English Dictionary-Thesaurus describes culture as "the sum of the language, customs, beliefs, and art considered characteristic of a particular group of people." Culture describes a shared manner of appearance, behaviour, thinking and feeling.



*We are all  
programmed  
by our culture*

Imagine shaking hands with a person you have never met. As you extend your hand, are you thinking about what position your hand should be in, how long to grasp, how firmly to grasp, whether to make eye contact or whether there should be any other body contact? Normally, you do not think about any of these things when you shake someone's hand. In fact, most people do not consciously know what they are doing nor what they are "saying" during such a simple communication. And yet, how do you react to a person whose handshake is unfamiliar? What if the handshake is too brief, the grasp is too weak, or eye contact is too long? You will form certain conclusions about the intentions of the other person based on his or her handshake. You may have inferred from your cultural programming that the other person is insincere, seeking a power advantage, or assuming a solidarity between you – and you may be very wrong. We are all programmed by our culture to think and act in certain ways. For example, think for a moment about your cultural programming with regard to: crossing the road, talking in elevators, the structure and process of meetings, being on time, family, health and well-being, and the role of the state in private life.

Most of the time, people within any given culture go about their lives understanding the meaning of each other's behaviour without having to analyze it. However, since no two cultures are the same, be careful about assuming that you understand the meaning of something in another culture. Effective intercultural communication occurs when people from two different cultures are able to understand each other.

## Intercultural Challenges

Here are some observations on some of the more significant intercultural challenges that your organization may face in your twinning project.

- **DECISION MAKING.** Decision making will be a necessary part of your twinning. You should understand that your partner's decision-making process may be very different from yours. It may be more or less democratic, inclusive, autocratic, consensual or bureaucratic. You may be very unfamiliar and uncomfortable with the process followed. However, unless your twinning objective is to change the decision-making process of your partner organization, you should focus on ensuring that decisions, however they are made, are in keeping with the goals of the twinning project.
- **COMMITMENT.** In some cultures, the definition of commitment often implies a form of democracy or inclusive consensus. This may not be the case in other cultures where commitment is more directive, possibly autocratic. It is not a good idea to make assumptions about whether one form of commitment is superior to another.
- **RELATIONSHIP AND TRUST.** Is trust based on signed agreements or does it depend on the relationship between parties? If trust is based on relationship, where does the relationship begin and end? In some cultures, particularly North America, relationships are specific to a task (e.g., job, sport, family) and are kept very separate from each other. Within other cultures, to have a relationship is to be much more involved in other aspects of the other person's life and to be called upon for

### *What about nephews?*



After many months of progress toward getting a new twinning project off the ground, the director of one partner received a letter from the nephew of the director of the other partner seeking assistance in admission at the first director's alma mater. Initially, the first director was shocked and offended; she considered the request to be overstepping the bounds of their relationship. However, after she discussed the situation with people experienced in relationships across these cultures, she realized that in the eyes of the other director this was a natural extension of a close and trusting relationship between partners. She wrote a letter to the admissions officer at her university introducing the nephew. She did not know the admissions officer and she wrote the letter in a manner that did not influence the admission decision. The gesture further strengthened the relationship with her partner.

help, or offered help, in areas outside the specific relationship. Understanding and being clear about the limits of relationship is important because failing, knowingly or unknowingly, to live up to the other person's view of the relationship may jeopardize the twinning project.

- **HOSTING.** To be a host... To be hosted... To be welcoming... These phrases come with a lot of cultural baggage. In some cultures, people tend to emphasize the independence of the individual; when hosting someone, they provide opportunities for visitors to do and see things – both socially and professionally – but they do not set out a minute-by-minute itinerary of activities. This type of option-based approach to hosting is often misunderstood as rude and unfriendly because in other cultures you would be taken care of every moment of your stay. Members of option-based cultures often find this latter approach very claustrophobic.

- **BILLETING.** If your twinning activities involve billeting visitors in homestay families, you should provide intercultural support to both the person being billeted and the homestay family. Here is an illustration of why this is important: A billet from a culture that must say "no" three times before saying "yes" will not eat very often in the home of a host family who accepts the first "no" as *no* rather than *ask me three more times to see if I really mean no*.

- **TEACHING AND LEARNING.** The concepts of teaching and learning are complex and often vary significantly across cultures. A proper understanding of these concepts is instrumental to success if the twinning involves information exchange, training or technology transfer. In some cultures, teaching is about creating a learning environment where it is the *responsibility of individuals to learn* what they need to know. In other cultures, it is the *responsibility of teachers to ensure learners learn* what they need to know.

### "Do you understand?"



You are an outreach coordinator in a metropolitan area AIDS clinic in a Northern country. An intern from your twinning partner (a Southern country) has spent one day observing the outreach process used in your clinic. He is still very unclear about how the system works. You ask him, "Do you understand how this works?" You are trying to find out if the intern was successful in fulfilling *his responsibility to learn* about the outreach process.

"Yes," he replies – a curious response, considering his state of confusion. However, in his mind, he would be insulting you if he said he did not understand because it would imply that you had failed in *your responsibility to teach him* about the outreach process.

An alternative approach would be to ask the intern if he could describe how he would compare your outreach process to that of his own organization. The gaps in his knowledge of your process would become apparent in the course of the discussion, thus leaving you with an opportunity to fill in the gaps or suggest more directed learning opportunities.

■ **TECHNOLOGY TRANSFER.** If your twinning project involves technology transfer, you need to have a very good understanding of the impact of cultural differences. The way one does things in a culture is shared among the members of that culture; is woven into that culture's way of doing many other things; and is reflective of (and inextricably linked to) the deepest held beliefs and traditions of that culture. How a culture deals with health issues, for example, is intertwined with that culture's fundamental beliefs about life, death, after-life, fate, caring, family, medicine, wellness and illness. When engaged in changing something as complex as health care, one must be knowledgeable about other factors in the culture that can affect the change (or that can be affected by the change). Often people involved in change are blind to the fact that an effective way of doing something is not effective in and of itself. Rather, a way of doing things is effective because it exists in a cultural context that enables it to work well. You cannot simply transplant a process or technique from one culture to another.

### *What is technology transfer?*



As the name implies, the transfer of technology involves taking an approach to handling problems or achieving results that is successful in one sector (or culture) and implementing it in another sector (or culture). The technology may refer to an automated system or a manual process. It can be as large as an entire system of taxation, for example, or as small as a training module or information booklet.



### *Transferring technology: a success story*

One partner in a twinning project had been running a successful community education programme on HIV transmission for several years. The organization's campaign in primary schools, using a series of young persons living with HIV/AIDS as speakers, had dramatically increased the level of awareness among teens about the methods of transmission of HIV. The second partner's community had experienced an increasing incidence of teen HIV transmission and the partner needed assistance in developing a programme of community education. By looking at what aspects of the programme made it successful (rather than the specific way it was done), the partners concluded that two things were instrumental: (1) identification by the children with peers, and (2) the message the peers communicated. The partners realized that the culture of the second partner would not permit community members to admit to having HIV/AIDS in a public forum. The solution was to prepare a series of comic book-style pamphlets which would be distributed to primary school students. The characters in the comics spoke about the same issues as the speakers and were easily identifiable to the children as peers, even though they were not really members of the community.

- **GOOD MANAGEMENT.** Certain cultures are obsessed with planning – strategic planning, work planning, scheduling, contingency planning – and believe that planning is a sign of good management. People in these cultures believe they are capable of controlling their destiny. Other cultures are more fatalistic. People in these cultures believe that the world will simply unfold as it will. For them, excessive planning wastes time; it does not save time. People in these cultures believe not that the plan is unimportant, but rather that there are other things that are more important and that there are forces at work that make it impossible to insist that the plan unfold as planned.
  
- **SELECTING PEOPLE FOR EXCHANGES, TRAINING AND STUDY TOURS.** This is potentially one of the most difficult issues in many twinning projects because of cultural differences in the rationale and processes for selection. In some cultures, people are chosen to receive training in another organization purely on the basis of their competence (i.e., knowledge, capability, potential, current job responsibilities). In other cultures, people are often chosen on the basis of their capacity to effect change (i.e., how well connected they are). In still other cultures, training exchanges are seen as perks, fringe benefits or opportunities for career advancement. Given these very different processes and criteria, the people selected may well arrive with very different levels of motivation, experience or technical competence. For your project, you may have to try to balance all of these factors. Sometimes an ideal mix exists in one person – i.e., someone who is technically competent, well connected, and strongly committed. However, because the ideal mix is not guaranteed, you may need to consider providing sufficient resources for two persons to receive training – one who will learn how to do the work and one with the necessary connections to effect change in the partner organization. It may also be important to provide additional learning materials that can be disseminated to others within the partner organization.

## Strategies for Intercultural Success

Here are some strategies your organization can adopt to successfully bridge cultural differences:

- **LEARN ABOUT YOUR CULTURES.**
  - Learn about your *partner's* culture; learn about your own culture. Learn not just the DOs and DON'Ts, but also the logic inherent in the culture – i.e., the connection between appearances, behaviours and values.



In our twinning project with Spolecnost AIDS Pomoc in Poland, I learned a lot about other cultures. Genuine respect for the people

and the country you want to collaborate with is a must."

– Rolf Tore Thomassen, Helseutvalget for homofile, Norway

■ **PRACTICE EFFECTIVE INTERCULTURAL COMMUNICATION.**

- Know what you want to communicate, and why you want to communicate, before you start to communicate. In other words, to communicate clearly you need to decode your meaning and intentions at the outset.
- Seek and provide feedback; present your understanding of the situation to confirm both parties have understood each other.
- Avoid jargon, slang and metaphors specific to your culture. Leave acronyms at home, too.
- Recognize that language proficiency does not mean intercultural competence.

■ **REALIZE THAT CULTURE SHOCK IS NORMAL.**

- You will make mistakes.
- You will have positive and negative emotional reactions to the appearance, behaviours and values of the other culture. This is natural. However, it is important to suspend judgement of the other culture until you are sure you understand the real meaning or intention of what you encountered.
- Be aware that the other person will be having similar positive or negative emotional reactions to your culture and that they may also be ill-informed.

■ **SEEK OUT CULTURAL INFORMANTS WHO CAN HELP EACH PARTNER INTERPRET THE OTHER'S CULTURE.**

*What is culture shock?*



The Wordsmyth English Dictionary-Thesaurus defines culture shock as "the anxiety, irritation, or confusion experienced by someone exposed to a culture with customs or behaviours different from those of his or her own culture." People who are in culture shock lose their ability to function effectively in another culture. They cannot understand the other culture, nor can they make themselves understood. In time, one learns to adjust and move beyond culture shock to adaptation.

## North-South Dynamics

It is important for organizations in the North that are considering twinning with organizations in the South to be aware of and to address differences in culture, circumstances and approach between North and South. You will need to explore carefully how to make a North-South match work for you and your potential partner. This is not a simple issue. There are many factors for you to consider, some of them seemingly contradictory. For example:

- **THE MYTH OF SUPERIORITY.** It is important to debunk the myth that the more technologically-advanced and wealthier countries of the North have all the know-how and experience and that Southern countries have less to contribute. Unfortunately, many people – in both the North and the South – still subscribe to this myth. Experience with North-South collaborations has taught us that both parties can learn equally from each other if people go in with the right attitude.
- **MOTIVATION (I).** If an organization in the North is interested in twinning with an organization in the South, it should ask itself why it wants to do so. If the motivation is to help, it is important to consider whether the twinning might end up disempowering the organization in the South by being based on assumptions about the expertise of the respective organizations. The challenge for the Northern organization is to share experience and expertise in a way that is empowering to the other party.
- **MOTIVATION (II).** If the motivation of the Northern organization is not so much to help as to learn from the Southern organization, then it is important to consider whether the twinning would place an unneeded burden on the Southern organization. Ideally, the twinning should involve benefits for the Southern organization that outweigh any extra burden.
- **SIMILAR PERSPECTIVES.** For certain types of activities, South-South twinning may be more appropriate than North-South twinning. This is often true if the exchanges involve training in skills areas such as fact-finding, human rights education and legal aid, because Southern organizations share similar historical, political and economic perspectives and experiences. Similarities in perspectives and experiences often lead to similar strategies, programmes and organizational styles.

■ **WHERE NORTH-SOUTH TWINNING WORKS.** The International Human Rights Internships Programme (IHRIP) reports that in their experience, North-South twinning has worked best in the following circumstances:

- where the Northern organization has a very specific expertise that the Southern organization is seeking to tap (e.g., a Northern organization that has experience in doing advocacy work with an international human rights body that the Southern organization wants to target);
- where the Southern organization is based in a country that is economically and technologically better off, so that the styles of work are not all that different between it and the Northern organization; or
- where there were people involved from both organizations who were sensitive to North-South issues and who had a very clear sense of what they were trying to accomplish.

■ **FUNDING.** The reality is that Northern organizations usually have more funds (or more access to funding) than their Southern counterparts. For practical reasons, therefore, North-South twinning is often easier to arrange than South-South twinning. Experience has shown that access to funding is often an *unstated* objective of North-South twinning.



***Practical assistance***

A Northern organization that is entering into a twinning relationship with a Southern organization that has fewer resources should consider offering practical assistance – e.g., helping the Southern organization to get access to e-mail.

While there are obviously potential pitfalls to North-South twinning, it is important for organizations in the North and the South to find a way to make North-South twinning work. HIV/AIDS is a global problem. North-South connections are vital if non-governmental organizations are going to play an important role in helping to shape policy at the global level.

## Other Considerations

There are two other issues related to cultural differences that you need to consider – language differences and intra-regional vs inter-regional twinning.

### Language Differences

When selecting a twinning partner, you will need to assess whether language differences could be a barrier to effective communications. Two factors to consider are the nature of the twinning project and the language capabilities of the two organizations.

For some twinning projects, you may need to ensure that many people in both organizations can speak the same language. For others, it may be sufficient if one person in each organization can communicate verbally and in writing in a common language.

It is important to ensure that the people involved in the project have the language skills to accomplish the objectives of the project. As a general rule the project managers of each organization should contact those selected as participants in the twinning project to determine their level of fluency – oral and written. It would be reasonable, for example, to confirm the participants' level of oral fluency by having a telephone conversation with them, and asking them to send a copy of a document or letter they have prepared in the language of the twinning project.



#### *Doing your homework*

If you do not make sure at the outset that language differences will not be a barrier, it could have a negative impact on your entire project. During the research conducted for this guide, one person commented as follows:

"We had agreed to work in French. When the representatives from our partner organization arrived, we were more than a little surprised to find out that they were not at all fluent in French. They did not have a level of written or oral French adequate enough to work with us effectively. Although they were very nice and tried very hard, the language gap was just too great. If I had to plan this project over again, I would insist on confirming for myself the language skills of all individuals involved in the project."

## **Intra-Regional vs Inter-Regional Twinning**

Whether you choose to twin with an organization from within your region of the world (intra-regional) or with one from another region (inter-regional) will depend on several factors, including what the needs of your organization are, which organizations are interested in participating in a twinning project, where the most suitable match can be found, and whether you have already developed a relationship with a particular organization.

Often, inter-regional twinning will involve more cultural and language differences than intra-regional twinning, but this is not always the case. In most cases, inter-regional twinning will involve greater travel costs.





# *How to Make Twinning Happen – A Step-by-Step Guide*

## **Introduction**

How should your organization go about setting up a twinning project?

This chapter provides a step-by-step guide for what your organization needs to do in the exploration stage and the planning stage.

The chapter also contains:

- tips for implementing your twinning project;
- some basic information on evaluating your twinning project; and
- information on how to deal with conflict should it arise during the course of a twinning project.

This chapter is written from the perspective of an organization that decides to embark on a twinning project and then sets out in search of a prospective partner. The chapter assumes that the twinning will take the form of a training, information or technical exchange. If, instead, your organization decides to embark on a collaboration on a specific initiative, most of the steps described on the following pages will still apply, but one or two of them may be redundant or may need to be modified.

## Exploration Stage

The exploration stage involves coming up with the idea to twin, making the necessary preparations within your own organization, identifying sources of funding, searching for potential partners, and coming to an agreement in principle with a partner organization. This section outlines the action steps required for this stage. Please note that these steps will not always happen in the precise chronological order indicated here. As well, there may be some overlap among the steps.

### 1 GENERATE THE IDEA.

Ideally, the process will start with a small group in the organization doing some early exploring and brainstorming, coming up with an idea, and then discussing the idea with staff, board members and volunteers.

*In brief:*  
**Exploration  
stage – the steps**



1. Generate the idea.
2. Conduct a needs assessment and a capacity assessment of your organization.
3. Establish goals and objectives.
4. Confirm that your organization is committed and ready.
5. Identify the people who will be involved.
6. Identify potential sources of funding.
7. Identify potential partner organizations.
8. Enter into discussions with potential partners.
9. Select one organization and obtain agreement to proceed.
10. Select the form(s) of twinning.

### 2 CONDUCT A NEEDS ASSESSMENT AND A CAPACITY ASSESSMENT OF YOUR ORGANIZATION.

Assuming that your organization has decided to pursue the matter further, you should now conduct needs and capacity assessments – i.e., identify your organization's needs (the areas where you think you could use some training or assistance) and strengths (the skills and resources your organization can share with others).

You may be familiar with the term "needs assessment." A needs assessment consists of gathering information (i.e., baseline data) before planning a project, so that you can be confident your project is responding to a real need. A capacity assessment is very similar, except that it looks at strengths rather than needs.

What process should you follow to conduct needs and capacity assessments? You will need to find the answers to some very simple questions:

- In terms of our current activities, where are we weak? Where are we lacking in knowledge and skills? Where could we use some help?
- Are there some activities we would like to undertake but have not undertaken because we do not have the knowledge or skills? What knowledge or skills could we use?
- Where are our strengths? Where do we excel? What knowledge and skills could we pass on to other organizations?

To obtain the answers, you could organize a brainstorming session, distribute a questionnaire or use a combination of both approaches.

The brainstorming session could involve staff, board members and volunteers (or selected representatives from each group). It is a good idea to distribute the questions in advance of the session and ask participants to think about these issues. It is also important to explain the context to



### ***Suggested reading***

For more on needs assessments, consult the following resources:

*Positive Development: Setting Up Self-Help Groups and Advocating for Change*, Global Network of People Living With HIV/AIDS.

*Toolkits: A Practical Guide to Assessment, Monitoring, Review and Evaluation*, by Louisa Gosling and Mike Edwards.

*Project Design for Program Managers: Conducting a Workshop on Planning Community-based Projects*, Cedpa.

Please see Appendix I for more information on these resources.



### ***Brainstorming***

Here are some tips for how to conduct your brainstorming session. This text has been adapted from the chapter on Planning Your Action in *Positive Development: Setting Up Self-Help Groups and Advocating for Change*, Global Network of People Living with HIV/AIDS (pp. 53-76). Please see Appendix I for more information on this resource.

- Keep the group relatively small (ideally 8-10 people).
- Arrange a comfortable meeting space where people can sit in a circle.
- Prepare some questions in advance to guide the discussion.
- Explain the purpose of the session.
- Encourage all group members to participate in the discussion.
- Summarize the discussion at the end.
- The facilitator should chair the meeting but should not get involved in the discussion directly.

participants – i.e., why the needs and capacity assessments are being done.

A questionnaire could be distributed to staff, board members and volunteers and the results could then be compiled and analyzed.

### 3 ESTABLISH GOALS.

The information from the needs and capacity assessments should enable your organization to establish clear goals for the twinning project. These goals will express what you hope to gain and what you can give. It is important to establish goals early in the process, though the goals may be modified as you enter into discussions with potential partners. Later in the process, you will need to define more specific objectives.

### 4 CONFIRM THAT YOUR ORGANIZATION IS COMMITTED AND READY.

Before proceeding any further, check to make sure that your organization is clear about why it wants to get involved in twinning and that it has a strong desire to embark on a twinning project.

You should also verify that your organization has the ability to take on a twinning project. Does it have the necessary time, space and resources? Does it have the right organizational culture? Is it equipped to deliver training or to supervise people?

As part of this process, you may want to consider altering your organization's mission statement to incorporate the sharing of experiences.

#### *Goals and objectives: what's the difference?*



A **goal** is a general statement of what the end result will be – i.e., what the project is trying to achieve.

*Example:*

Improve the skills of Organization X in documenting cases of human rights abuse.

An **objective** is a more precise statement of what the project will do to achieve the goal.

*Examples:*

1. Prepare a curriculum for a one-week training session by July 14, 2001.
2. Conduct five training sessions on-site at Organization X in 2001-2002.

Objectives need to be specific, measurable and attainable within a specific time frame.

## 5 IDENTIFY THE PEOPLE WHO WILL BE INVOLVED.

At this point, you should determine which person in your organization will take the lead on this project. It is a good idea to identify a second person to assist the leader and to be available for back-up. As the project develops further, you may want to add more people to the team. The selection process is very important; you want to ensure that you select the right people for this task.

Ideally, you should select people with:

- good project management skills;
- good interpersonal skills;
- experience in previous twinning projects;
- experience in international HIV/AIDS issues or development issues;
- expressed interest in working with organizations in other countries; and
- desire to take on new challenges.

## 6 IDENTIFY POTENTIAL SOURCES OF FUNDING.

You should have a fairly good idea early on whether funding for twinning is (or will be) available in your organization or whether, as is more likely, you will need to approach an external funder. If you will need external funding, you should identify the potential funder (or funders) and you should be satisfied that there is a reasonable prospect of obtaining the funds.

## 7 IDENTIFY POTENTIAL PARTNER ORGANIZATIONS.

You may already have one or more organizations in mind, based on discussions that have already taken place, on the people you have met at international conferences, or on other factors. If not, you need to identify potential partners. At this stage, it is probably a good idea to identify two or three potential partners to maximize your chances of success. You may wish to consider some of the following factors when deciding where to look.

- **COMPATIBILITY.** You may want to restrict your search to organizations that are of a similar maturity and that have similar experiences, concerns, interests, approaches and activities.
- **LANGUAGE COMPATIBILITY.** You have to be able to communicate with your partner, so language considerations are important. See Section 3.3 *Other Considerations* for a discussion of this issue. Remember to take into account language capabilities in your own organization. Some people in your organization may speak languages other than the one you use for daily communication. Also, do not be too quick to make assumptions about the language capabilities of potential partners. In fact, you should confirm the language skills of all project participants (in both organizations).

- **CULTURAL COMPATIBILITY.** You will have to decide whether cultural compatibility is an important consideration for your twinning project. See Chapter 3 *Bridging Cultural Differences* for a discussion of cultural issues.
- **TRAVEL DISTANCES.** If funding is severely limited, this could be an important factor.

### *How do I find a partner?*



Some well-connected organizations may not need assistance in finding a suitable partner. Smaller organizations, however, may not know where to turn. Here are a few suggestions:

- Approach national or regional HIV/AIDS coalitions or networks in your area. They may have information on other organizations, they may know which organizations are looking for partners, or they may be able to help you contact a potential partner.
- Approach international development NGOs in your area. They may know of programmes to facilitate twinning, or they may have useful contacts with organizations from other countries.
- Post a notice on an e-mail discussion forum. A list of HIV/AIDS-related e-mail discussion forums is provided in Appendix V.
- Contact potential partner organizations directly. Where possible, use the language of the recipient organizations. There are a number of ways you can identify other organizations, including:
  - searching the Internet;
  - consulting regional and global HIV/AIDS directories;
  - checking summaries of meetings and other reports for listings of organizations;
  - and
  - approaching national HIV/AIDS coalitions and networks in other countries.
- If you are sending someone to a regional or global HIV/AIDS conference, take advantage of the opportunity to approach people from other organizations. You may not establish a twinning relationship with the organization of the first or second person you meet, but these contacts will lead to other contacts.

## **8 ENTER INTO DISCUSSIONS WITH POTENTIAL PARTNERS.**

This is the time to begin exploring a possible match with potential partners. First, you need to determine if they are interested. Then, you need to exchange information on your respective needs and capacities to determine if a match would be suitable.

It is important for your organization to develop a good understanding of potential partner organizations – the issues they work on, the strategies and techniques they use, their level of development, etc.

## **9 SELECT ONE ORGANIZATION AND OBTAIN AGREEMENT TO PROCEED.**

You need to select the organization that you want to partner with. Then you need to reach an agreement in principle with that organization to proceed with the planning for a twinning project.

## **10 SELECT THE FORM(S) OF TWINNING.**

In consultation with your new partner, you will need to select the form or forms of twinning that you will engage in. Which form of twinning makes sense for the two organizations? Training exchanges, information exchanges, or technical exchanges? If you choose training exchanges, should you get involved in internships, on-site training or study tours? (See Section 1.3 *Forms of Twinning* for descriptions of the different forms of twinning.)

The answers to these questions will depend primarily on the needs and capacities of your organization and of your partner organization. Therefore, good self-analysis and good communications are essential tools for helping you decide. If you are already far advanced in discussions with a potential partner, this may make your decision easier.

Finally, keep in mind that a twinning project can include more than one form of twinning.



### ***It takes time***

It is important to establish a relationship with your potential partner. So, if you are not dealing with an organization that you already know, steps #8 and #9 may take considerable time – perhaps several months.

## *Internships?*



One of the forms of twinning you may consider is internships. Are internships the right form of twinning for your organization? The following text has been adapted from *Exchanging Human Rights Experience: A Handbook for Practical Training*, a manual produced by the International Human Rights Internship Program. Please see Appendix I for more information on this resource.

Internships are appropriate when:

- the participant will be able to learn about programme structures, strategies and techniques employed by the host organization that could be implemented at home;
- the structures, strategies and techniques to which the participant wants exposure require an in-depth, long-term placement to observe the complexities of the work;
- the specific skills to be acquired are ones that require significant practice to perform effectively;
- the sending and host organizations would benefit from exchanging experiences about structures, strategies and techniques; or
- the host organization is in contact with other organizations, governmental agencies and other bodies from which the participant could also learn.

Internships are **not** appropriate when:

- the type of knowledge desired would be better conveyed through a course or seminar;
- the work of the host organization does not involve structures, strategies or techniques that would be useful or applicable in the participant's home context;
- the host organization will not be able to devote the time to adequately prepare for the participant's arrival, to develop a workplan or supervise the participant;
- the participant does not have enough background or experience in the specific area of work to effectively utilize a short-term placement; or
- the participant does not have adequate language ability or, in some situations, writing skills.

## Planning Stage

Now that you have an agreement in principle with your partner organization, you need to do some formal planning. This section outlines the steps involved in the planning stage. Please note that these steps will not always happen in the precise chronological order indicated here. As well, there may be some overlap among the steps.

### 1 PREPARE A GENERAL OUTLINE OF THE PROJECT.

The outline should include:

- the proposed goals and objectives;
- a brief description of the form of twinning and the proposed activities;
- the proposed time frames;
- an estimate of costs;
- tentative plans for securing the necessary funding; and
- a list of the resources each organization is bringing to the twinning partnership, including which people from each organization will be involved.

(See Step #3 in Section 4.1 *Exploration Stage* for a discussion of the differences between goals and objectives.)

The outline should be prepared jointly by both organizations.

#### *In brief:* **Planning stage – the steps**



1. Prepare a general outline of the project.
2. Obtain agreement on the general outline.
3. Prepare a detailed project plan.
4. Obtain agreement on the detailed project plan.
5. Obtain the necessary funding.



#### **Site visits**

Although a site visit to your partner organization during the planning stage would be optimal, it may not be possible due to funding constraints. Good relationships can still be developed through e-mail, telephone and fax communications.

## **2** OBTAIN AGREEMENT ON THE GENERAL OUTLINE.

Both organizations need to formally approve the general outline.

## **3** PREPARE A DETAILED PROJECT PLAN.

The plan should include:

- the goals and objectives of the project;
- the roles and responsibilities of both organizations;
- an action plan showing activities and time frames;
- a detailed budget;
- a fundraising strategy;
- a list of the people from each organization who will be involved;
- the expected results and the success indicators;
- a monitoring and reporting strategy; and
- an evaluation strategy.

The plan should spell out exactly what the role of each organization will be in the twinning project, including in areas such as supervision, provision of office space, preparation of documentation and reports, and communications.

The project plan needs to be considerably more detailed than the outline you did in Step #1.



### *Formal agreement*

What should be included in a formal agreement? In 1999, the Centers for

Disease Control (CDC) in the United States issued a request for proposals for a programme entitled "Cooperative Agreements for Non-Governmental Organizations (NGO) Partnerships Pilot Project." It suggested that a formal agreement (it refers to it as a memorandum of agreement) include the following:

- a statement of agreement to collaborate;
- the goals of the collaboration;
- the name, address and description of each partner;
- a list of services or goods each organization is willing to provide or exchange;
- information on how the services and goods will be provided or exchanged;
- information on how confidentiality issues will be handled;
- information on how documentation and reporting will be done;
- information on how the content of the memorandum of agreement will be reviewed, evaluated and updated (if necessary);
- information on the length of the agreement (including a termination clause); and
- the signatures of authorized persons at both organizations.

**4****OBTAIN AGREEMENT ON THE DETAILED PROJECT PLAN.**

Both organizations should approve the detailed project plan. You may want to draw up a formal agreement for the two organizations to sign. Consider including a clause allowing either partner to pull out of the arrangement if its circumstances change.

**5****OBTAIN THE NECESSARY FUNDING.**

If you don't already have the required funding within your organizations, you will need to approach one or more potential funders. Depending on the requirements of the funders, you may want to make your initial approach (or even your final approach) earlier in the process, perhaps after the two organizations have agreed on the general outline. It is important to ensure that you start exploring possible funding before you dot the i's and cross the t's on any agreements (see Step #6 in Section 4.1 *Exploration Stage*.)

You may need to develop a project proposal to submit to potential funders. You can use either the general outline or the detailed project plan as the basis for your project proposal.

**Fundraising – suggested reading**

If your organization is not that experienced in fundraising, you may want to consult one of the following resources:

- *The Worldwide Fundraiser's Handbook: A Guide to Fundraising for Southern NGOs and Voluntary Organizations*, by Michael Norton.
- *Writing Better Fundraising Applications: A Practical Guide with Worked Examples, Exercises and Ideas for Worksheets*, by Michael Norton.
- *The Program Development Puzzle: How to Make the Pieces Fit*, National Minority AIDS Council.

See Appendix I for further information on these resources.

## Implementing Your Twinning Project

Now that the planning is complete, you are ready to implement your twinning project. Implementation should generally follow standard project management practices. This section contains a few suggestions that relate specifically to twinning projects.

### Working with Your Twinning Partner

If you are working with an organization from another culture, make sure that the people in your organization have some understanding of that culture at the outset. See Section 3.1 *Intercultural Understanding and Communications* for a discussion of cultural issues.

You may also need to be prepared to encounter perceptions of gender roles in your partner organization that differ from your own perceptions – particularly as these roles affect public attire, behaviour and ways of dealing with authority.

### Monitoring and Reporting

How do you know if your project is on track? You will need to monitor the project on an ongoing basis. Monitoring is a continuous process of collecting and analysing information on the implementation of a project. Monitoring can tell you if the activities have been implemented according to your plan.

Monitoring involves:

- reviewing the action plan to verify that planned activities are being carried out and that there are no serious delays;
- reviewing the budget to verify that the project is staying within budget;
- verifying that progress is being made towards accomplishing the goals of the project; and
- identifying whether any problems have arisen in the implementation of the project.



#### ***Suggested reading***

If you would like more information on monitoring and reporting, consult *Participatory Monitoring, Evaluation and Reporting*, Pact Publications. See Appendix I for more information on this resource.

If there are any difficulties – if the project is falling behind schedule, if expenses are too high, if progress is not being made in attaining the goals, or if any problems have occurred during implementation – then, corrective action needs to be taken. This could include making some changes to the action plan.

Reporting is part of the monitoring process. Progress reports should be prepared at regular intervals during the twinning project. The reports should contain information on the same four elements identified above:

- the status of the action plan;
- the status of the budget;
- progress towards accomplishing the goals of the project; and
- problems that have arisen in the implementation of the project.

The progress reports should also describe the corrective action that has been taken to address any difficulties.

Progress reports can also be used to keep the funder informed and to disseminate information about the twinning project within the partner organizations and to other organizations.

Once the project is completed, a final report should be prepared. It should include a section on lessons learned and recommendations for future twinning projects. Be sure to share the final report with other organizations, including your national and regional HIV/AIDS networks (especially if they helped you establish the twinning project). This will help to spread the word. You may also wish to consider organizing a seminar for other organizations in your community that have not been involved in twinning projects before.

If your project involves internships, it is a good idea to ask the interns to prepare two reports – a "final" report immediately after the end of their placement and a follow-up report several months later. In the follow-up report, they can describe the extent to which they have been able to apply the knowledge learned during their placement.



### ***Final report***

The outline for your final report might look something like this:

- Introduction
  - how the project came about
  - how it was funded
  - who was involved
- Project description
  - summary
  - goals and objectives
  - activities and timelines
- Results of the project
  - activities implemented
  - achievement of goals and objectives
- Lessons learned
- Recommendations for future projects
- Report on expenditures

## Preparations by the Host Organization

If you are hosting people from your partner organization, here are a few suggestions concerning how to prepare for their visit:

- Remember to make arrangements for accommodations and, possibly, meals (organizations involved in twinning often cut down on costs by arranging to billet visiting persons in private homes).
- In advance of the visit, send your visitors information on the characteristics of your country – e.g., climate, temperature and humidity; visa requirements; electrical power voltage; what type of attire would be appropriate; currency exchange rates; approximate living costs; some basic DOs and DON'Ts; and whether they will be met upon arrival.
- Organize a briefing session at the start of the visit to introduce your visitors to your organization (and other organizations if appropriate) and to acquaint them with the HIV/AIDS situation in your country.
- Consider organizing some leisure activities for your visitors, particularly if they are from a different culture.



### *Making use of modern technology*

Many organizations involved in twinning projects have found that the use of modern forms of communication – particularly e-mail and the Internet – improves communications between the partners, saves time and helps to keep costs down. E-Mail messages usually take only a few minutes to deliver, at most a few hours. Often you can attach materials to your e-mail messages, including word processing files, financial spreadsheets, graphics and computer software programmes.

For more on the use of e-mail and the Internet, consult the following resources:

- *The Internet and World Wide Web: The Rough Guide (4th edition)*, by Angus J. Kennedy.
- *HIV/AIDS Networking Guide*, by Bruce Waring.

See Appendix I for further information on these resources.

## Preparations by the Visitor

If someone from your organization will be travelling to your partner organization, here are a few suggestions for how to prepare for the visit:

- Do your homework before you leave concerning cultural matters so that you will be sensitive to and familiar with appropriate culturally-based behaviours.
- Read up on the HIV/AIDS situation in the country you will be visiting (e.g., rate of HIV prevalence, contents of the national AIDS programme, the political milieu in which voluntary sector organizations operate).
- Obtain information on the organization you will be visiting (e.g., how it is structured, its mandate; its workplan, its latest annual report).

## Evaluating Your Twinning Project

Evaluation is a critical component of any twinning project. You need to know what worked and what did not work. Evaluations conducted during the course of a twinning project can result in modifications to the project workplan. Evaluations conducted at the end of a twinning project can influence planning for future projects. The text for this section has been adapted from the *HIV/AIDS Networking Guide*, by Bruce Waring; and *Effective Organizations: A Consultant's Resource*, by Judy Kent. See Appendix I for more information on these resources.

### What Is an Evaluation?

Evaluation is a means of assessing the process and outcomes of an activity. It looks at what and how; it compares what you expected to happen with what really happened, and it examines how things were done. Evaluation should be part of your project planning right from the start.

There are two kinds of evaluation: process and outcome. Process evaluation measures how you are doing things. Outcome evaluation measures your progress and how well you have accomplished your goals. Organizations involved in a twinning project should do both process and outcome evaluations.

### Why Evaluate?

Evaluating how well the twinning project functions (process) and what the twinning project achieves (outcome) is essential in preserving commitment to the project from the partner organizations and from the funders. People and organizations involved in twinning need evidence that their efforts are having an impact.

Evaluations also provide information on how to make the twinning project more effective and relevant to the needs of the partner organizations and the clientele they serve (including people living with HIV/AIDS).

## Fundamental Evaluation Issues

In any evaluation, certain fundamental issues must be addressed. These include:

- **RATIONALE.** Why did we take this direction or action in the first place?
- **IMPACT.** What has happened as a result of this activity?
- **GOAL ACHIEVEMENT.** Has the activity achieved what was expected?
- **VALUE FOR EFFORT.** Was the outcome of the activity worth the expenditure of effort and resources?
- **ALTERNATIVES.** Are there better ways of achieving the desired result? If we made mistakes or encountered problems, how can we avoid them next time?
- **NEXT STEPS.** How do we plan to use the evaluation findings for continuous learning?

The following steps describe a generic evaluation process for an overall review of a programme, project or activity. You will need to adapt them to the specific needs of your project.

- **DESIGN THE EVALUATION PLAN.**
  - Prepare a clear description of the purpose and the desired outcomes of the evaluation.
  - Determine what information is required and what will be done with the information after it is collected. This includes determining how stakeholders will utilize the results.
  - Determine exactly which elements of the project will be evaluated.



### *Including an evaluation strategy in your project planning*

An evaluation strategy should be part of your project planning from the outset. To give you an idea of what information on evaluation many funders expect when you submit a funding proposal, here is a summary of the requirements that were included in a request for proposals put out by the Centres for Disease Control in the United States in 1999:

- information on the specific methods that will be used to measure progress towards attaining objectives and to monitor activities;
- how the necessary information will be obtained and recorded;
- how the information will be summarized in quarterly reports;
- how the information will be used to improve the programme; and
- how successful approaches and lessons learned will be shared with other organizations.

- Determine which methods or tools will be used for the evaluation (e.g., questionnaire, interview, focus-group, a combination of these methods).
  - Determine what human and financial resources are required, including who will conduct the evaluation and who will write the evaluation report.
  - Obtain the required resources.
  - Identify the people who will be asked to participate in the evaluation.
  - Specify what questions must be asked in order to obtain the desired information.
  - Test the evaluation methods and tools on a small sample of those who will be participating in the evaluation.
  - Make any necessary changes to the evaluation methods and tools.
  - Determine how the results of the evaluation will be communicated.
- **CONDUCT THE EVALUATION.**
- Deliver the evaluation tools to the selected participants.
  - Collate the collected information.
- **ANALYZE THE EVALUATION RESULTS.**
- Conduct an analysis of the evaluation results.
  - Form conclusions from the analysis.
  - Develop recommendations.
  - Validate the recommendations with those who participated in the evaluation.
  - Prepare a full report of the evaluation results and recommendations for the organization.



### ***Suggested reading***

If you would like more information on conducting evaluations, check out the following resources:

- *Partners in Evaluation: Evaluating Development and Community Programmes With Participants*, by Marie-Therese Fuerstein.
- *Toolkits: A Practical Guide to Assessment, Monitoring, Review and Evaluation*, by Louisa Gosling and Mike Edwards.
- *Evaluator's Handbook: The Program Evaluation Kit*, by Joan Herman et al.
- *Collaboration Handbook: Creating, Sustaining and Enjoying the Journey*, by Michael Winer and Karen Ray.

See Appendix I for more information on these resources.

## Dealing With Conflict

Your organization needs to be prepared to deal with conflict should it arise. Partners in a twinning project bring with them different preferences, histories, communication patterns and experiences with decision making, especially if the project involves organizations from different cultures. So, some conflict may well occur.

Conflict is not necessarily a bad thing; often, lack of conflict means that issues are buried instead of being dealt with openly. By not allowing conflict, we limit our ability to change. The following text may help your organization handle conflict if it arises during the course of your twinning project. It has been adapted from HIV/AIDS Networking Guide, by Bruce Waring; Effective Organizations: A Consultant's Resource, by Judy Kent; and Collaboration Handbook: Creating, Sustaining and Enjoying the Journey, by Michael Winer and Karen Ray. See Appendix I for more information on these resources.

### Sources of Conflict

The potential sources of conflict include:

- **ASSUMPTIONS AND PERCEPTIONS.** Different people view the same situation and see it differently, because their past experiences and personal beliefs and values differ.
- **VALUES, NEEDS AND GOALS.** The values, needs and goals of an individual (or an organization) may be in conflict with the values, needs and goals of other individuals (or the partner organization).
- **EMOTIONS.** Powerful emotions such as fear, anger, anxiety and frustration, often block communication or distort perceptions to the point of conflict with others.
- **LACK OF INFORMATION OR CLARITY.** Members perceive that they do not have all the information. Or, they may possess the information but fail to understand it. People understand differently and this can result in conflict.
- **INDIVIDUAL STYLES OF COMMUNICATION AND BEHAVIOUR.** Insensitive or inappropriate interaction with others can create resistance. An aggressive approach that belittles others usually causes conflict. An over-accommodating passive nature can also cause frustrations which lead to conflict.

## Resolving Conflict

To resolve conflict, organizations involved in a twinning project need to:

- **EXPECT CONFLICT.** You will be better prepared to recognize conflict and to deal with it effectively if you expect conflict to occur.
  
- **CLARIFY THE ISSUES.** Before you can attempt to resolve conflict, you need to identify the issues involved in any disagreement. A simple question (such as "What's going on here?") is often enough for people to start talking and dealing with the conflict.
  
- **IMPLEMENT A CONFLICT RESOLUTION PROCESS.** Here are some simple steps:
  - Examine the conflict in light of the project's objectives. Ask yourself, "If we want to achieve these results, what must we do about this conflict?"
  - Separate the conflict from concepts of right and wrong. Conflicts are not about right and wrong; they are about different ways of looking at things or doing things.
  - Decide who will facilitate the process for resolving the conflict.
  - Make sure everyone is heard. Ask the parties involved in the conflict to explain their positions and define their needs.
  - Search for possible solutions and examine their implications.
  - Decide on the solution and on what steps are required to implement it.
  - Try not to alienate anyone. The people involved in the project must continue to work together, so create opportunities for healing and forgiveness.

A good conflict resolutions process is one that involves negotiation rather than confrontation. Effective negotiation is based on concern for others, mutual respect, and a focus on the goals and objectives of the twinning project. This is a "win-win" approach; it usually results in faster and higher quality decisions.

# Invitation to Comment on this Guide and Share Your Experiences

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*Beyond our Borders: A Guide to Twinning for HIV/AIDS Organizations* is intended to help organizations establish twinning relationships. The Interagency Coalition on AIDS and Development (ICAD) would like to hear reader's opinions of this guide. Your comments and suggestions will greatly contribute to and become part of shared knowledge. They will be incorporated into possible future editions of the guide.

Here are some questions to help you frame your comments:

- Did you find *A Guide to Twinning* useful?
- If yes, which parts did you find most useful? How have you used the guide to help you with your work?
- Have you used parts of the guide to help you establish a twinning project?
- Were there any issues or topics that you felt were missing?
- Do you have any other comments, criticisms or recommendations?

ICAD would also like to receive feedback about your experiences with twinning projects, including:

- results obtained;
- other positive aspects;
- any problems encountered; and
- lessons learned.

Please also send us copies of any evaluations that were done on your twinning project.



***Please send  
your  
comments to:***

Interagency Coalition on AIDS and  
Development  
180 Argyle Avenue  
Ottawa ON K2P 1B7  
CANADA  
Tel.: 613 788-5107  
Fax: 613 788-5082  
E-Mail: [info@icad-cisd.com](mailto:info@icad-cisd.com)  
Website: <http://www.icad-cisd.com/>



# *Appendices*

# A P P E N D I X I

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## Resource List

This appendix lists the publications that were cited in the course of this guide. Whenever possible information on how to obtain the publications has been provided. The publications for which such information is not included are in print. We suggest that you try finding them in a local library or ordering them through a local book store. Those who have access to e-mail and the Internet may want to try one of the online bookstores.

Adler, Nancy J. *International Dimensions of Organizational Behaviour*, (3rd Edition). Cincinnati, South-Western College Publishing, 1997.

Cedpa. *Project Design for Program Managers: Conducting a Workshop on Planning Community-based Projects*. 1994. Available through The IT Bookshop, 103-105 Southhampton Row, London WC1B 4HH, England. E-Mail: <orders@itpubs.org.uk>. Website: <<http://www.oneworld.org/itdg/publications.html>>.

Fisher, Glen. *Mindsets: The Role of Culture and Perception in International Relations*, (2nd Edition). Yarmouth, Maine, Intercultural Press, Inc., 1997.

Fuerstein, Marie-Therese. *Partners in Evaluation: Evaluating Development and Community Programmes With Participants*. MacMillan, TALC, 1986. ISBN 0-333-42261-9. Available through The IT Bookshop, 103-105 Southhampton Row, London WC1B 4HH, England. E-Mail: <orders@itpubs.org.uk>. Website: <<http://www.oneworld.org/itdg/publications.html>>.

Global Network of People Living With HIV/AIDS. *Positive Development: Setting Up Self-Help Groups and Advocating for Change*. Amsterdam, 1998. ISBN: 0-907320-449. Available from GNP+, P.O. Box 11726, 1001 GS Amsterdam, Netherlands.

Gosling, Louisa and Edwards, Mike. *Toolkits: A Practical Guide to Assessment, Monitoring, Review and Evaluation*. (SCF Development Manual 5). London, Save the Children, 1995. ISBN 1-870322-93-2. Available through The IT Bookshop, 103-105 Southhampton Row, London WC1B 4HH, England. E-Mail: <orders@itpubs.org.uk>. Website: <<http://www.oneworld.org/itdg/publications.html>>.

Herman, Joan et al. *Evaluator's Handbook: The Program Evaluation Kit*. Sage Publications, 1987. ISBN: 0-8039-3126-3.

International Human Rights Internship Program. *Exchanging Human Rights Experience: A Handbook for Practical Training*. 1997. Available from IHRIP, Institute of International Education, Suite 650, 1400 K Street N.W., Washington, DC 20005, United States. E-Mail: <ihrp@iie.org>.

Kent, Judy. *Effective Organizations: A Consultant's Resource*. Skills Program for Management Volunteers, 1992.

Mattessich, Paul W. and Monsey, Barbara R. *Collaboration: What Makes It Work*. Saint Paul, Minnesota, Amherst H. Wilder Foundation, 1992. ISBN 0-940-06902-4. Available through the Foundation at Publishing Centre, 919 Lafond Avenue, St. Paul, MN 55104, United States. E-Mail: <webmaster@wilder.org>. Website: <<http://www.wilder.org>>.

National Minority AIDS Council. *The Program Development Puzzle: How to Make the Pieces Fit*. Support Center for NonProfit Management, 1997. Available from NMAC, 1931 13th Street, N.W., Washington, DC 20009, United States. E-Mail: <info@nmac.org>. Website: <<http://nmac.s-3.com/welcome.htm>>.

Norton, Michael. *The Worldwide Fundraiser's Handbook: A Guide to Fundraising for Southern NGOs and Voluntary Organizations*. Directory of Social Change, 1996. ISBN: 1-87386-075-7. Available through The IT Bookshop, 103-105 Southhampton Row, London WC1B 4HH, England. E-Mail: <orders@itpubs.org.uk>. Website: <<http://www.oneworld.org/itdg/publications.html>>.

Norton, Michael. *Writing Better Fundraising Applications: A Practical Guide with Worked Examples, Exercises and Ideas for Worksheets* (2nd Edition). Directory of Social Change, 1992. ISBN: 1-90036-020-9. Available through The IT Bookshop, 103-105 Southhampton Row, London WC1B 4HH, England. E-Mail: <orders@itpubs.org.uk>. Website: <<http://www.oneworld.org/itdg/publications.html>>.

Pact Publications. *Participatory Monitoring, Evaluation and Reporting*. New York, 1998. Available from Pact Publications, 777 United Nations Plaza, New York, NY 10017, United States. E-Mail: <books@pactpub.org>. Website: <<http://www.pactpub.com/>>.

Trompenaars, Fons. *Riding the Waves of Culture: Understanding Cultural Diversity in Business*. London, Irwin Professional Publishing, 1993.

Waring, Bruce. *HIV/AIDS Networking Guide*. Ottawa, International Council of AIDS Service Organizations, 1997. Available in English, French and Spanish on the ICASO website: <<http://www.icaso.org/guide.html>>. Also available through the Canadian AIDS Clearinghouse, 400-1565 Carling Avenue, Ottawa ON K1Z 8R1, Canada. E-Mail: <aidssida@cpha.ca>. Website: <<http://www.cpha.ca>>.

Winer, Michael and Ray, Karen. *Collaboration Handbook: Creating, Sustaining and Enjoying the Journey*. Saint Paul, Minnesota, Amherst H. Wilder Foundation, 1996. ISBN 0-940069-03-2. Available through the Foundation at Publishing Centre, 919 Lafond Avenue, St. Paul, MN 55104, United States. E-Mail: <webmaster@wilder.org>. Website: <<http://www.wilder.org>>.

## A P P E N D I X I I

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# Resources on Intercultural Learning

This appendix provides information on resource for persons interested in knowing more about intercultural learning.

## Organization

### Centre for Intercultural Learning Canadian Foreign Service Institute

The Centre for Intercultural Learning assists professionals from private industry, government, non-governmental organizations and universities to develop the intercultural competencies essential for their success.

Contact:

Thomas Vulpe, Director  
Centre for Intercultural Learning  
Canadian Foreign Service Institute  
Department of Foreign Affairs and International Trade  
125 Sussex Drive  
Ottawa ON K1A 0G2  
CANADA  
Tel.: 819 994-3734  
Fax: 819 997-5407  
E-Mail: [thomas.vulpe@dfait-maeci.gc.ca](mailto:thomas.vulpe@dfait-maeci.gc.ca)  
Website: <http://www.cfsi-icse.gc.ca>

## Website

### E-thologies [www.ethologies.com](http://www.ethologies.com)

E-thologies is a new country information resource available on the Internet. It was developed by the Centre for Intercultural Learning, Canadian Foreign Service Institute. This online service is a collection of electronic "anthologies" that links the user quickly and effectively to pertinent and current country-specific published information. The e-thologies site is organised into a social, political, economic, environmental and cultural information framework.

## Books

Trompenaars, Fons. *Riding the Waves of Culture: Understanding Cultural Diversity in Business*. London, Irwin Professional Publishing, 1993.

Adler, Nancy J. *International Dimensions of Organizational Behaviour*, (3rd Edition). Cincinnati, South-Western College Publishing, 1997.

Fisher, Glen. *Mindsets: The Role of Culture and Perception in International Relations*, (2nd Edition). Yarmouth, Maine, Intercultural Press, Inc., 1997.

## Publisher and Distributor

### Intercultural and Community Development Resources Inc. (ICDR)

ICDR distributes books and other resources on the intercultural experience covering topics such as culture shock, cross-cultural adaptation, developing intercultural communication skills, re-entry and overseas living.

Contact:

Dorothy Morrison, Client Services

Intercultural and Community Development Resources Inc.

Suite 203, 10138-81 Ave

Edmonton, AB T6E 1X1

CANADA

Tel.: 800 378-3199 (Canada and the United States only) or 780 437-8013

Fax: 780 439-6879

E-Mail: [dorothy@icdr.com](mailto:dorothy@icdr.com)

Website: <http://www.icdr.com>

## A P P E N D I X   I I I

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# Contact Information Twinning Projects

This appendix provides contact information for the twinning projects described in Section 1.4 *Examples of Twinning*.

### **AIDS Law Project – Canadian HIV/AIDS Legal Network Partnership**

Mark Heywood, Head  
AIDS Law Project  
Centre for Applied Legal Studies  
Private Bag 3  
Witwatersrand 2050  
SOUTH AFRICA  
Tel.: 27 11 403-6918  
Fax: 27 11 403-2341  
E-Mail: 125ma3he@solon.law.wits.ac.za

Ralf Jürgens, Executive Director  
Canadian HIV/AIDS Legal Network  
484 McGill Street, 4th Floor  
Montréal QC H2Y 2H2  
CANADA  
Tel.: 514 397-6828  
Fax: 514 397-8570  
E-Mail: ralfj@aidslaw.ca

### **Ain O Salish Kendra – Task Force Detainees**

### **People's Institute for Participatory Action Research – Various Organizations**

### **Women's Centre for Peace and Development/Women's Rights Project of the Civil**

### **Liberties Organization – International Federation of Women Lawyers**

Note: The contact person for all three of the projects listed above is:

Ann Blyberg, Executive Director  
International Human Rights Internship Program  
Institute of International Education  
Suite 650, 1400 K Street N.W.  
Washington, DC 20005  
UNITED STATES  
Tel.: 202 326-7725  
Fax: 202 326-7763  
E-Mail: ablyberg@iie.org

### **Areas of Affinity Initiative**

Gail Goodridge, Director,  
Program Management Division  
HIV/AIDS Prevention and Care Department  
Family Health International  
2101 Wilson Boulevard  
Suite 700  
Arlington VA 22201  
UNITED STATES  
Tel.: 703 516-9779  
Fax: 703 516-9781  
E-Mail: ggoodridge@fhi.org

### **Haemophilia Foundation Victoria – Hemophilia Association of the Philippines for Love and Services**

Jennifer Ross,  
Executive Director  
Haeomophilia Foundation Australia  
213 Waverly Road  
East Malvern, Victoria 3145  
AUSTRALIA  
Tel.: 61 3 9572-5533  
Fax: 61 3 9572-0622  
E-Mail: fhaust@haemophilia.org.au  
Website: <http://www.haemophilia.org.au>

Violeta Magsuci  
Hemophilia Association of the Philippines for Love and Services  
Department of Pediatrics, Hema-Onco  
Short Stay Service, 3/f Clinical Div  
University of Santo Tomas  
España, Manila  
PHILIPPINES 1008  
Tel.: 63 2 731-3001  
Fax: 63 2 749-9704  
E-Mail: ustpedia@pacific.net.ph

### **Kenya Human Rights Commission – Network of Independent Monitors**

Claudia Motswane  
Article 19  
P.O. Box 30942  
Braamfontein 2017  
SOUTH AFRICA  
Tel.: 27 11 403-1488 or 403-1482  
Fax: 27 11 403-1517  
E-Mail: claudia@article19.org.za

### **Spolecnost AIDS Pomoc – Helseutvalget for homofile**

Rolf Tore Thomassen  
Helseutvalget for homofile  
(Norwegian Gay Health Committee)  
Øvre Slottsgt. 29  
1057 Oslo  
NORWAY  
Tel.: 47 22 33 70 15  
Fax: 47 22 33 62 72  
E-Mail: rolf.thomassen@helseutvalget.no

## **The United States-Venezuela Air Bridge**

Renate Koch, Executive Director  
Acción Ciudadana Contra el Sida  
Avda. Romulo Gallegos  
Edo Maracay, piso 11, apto 21  
Urb. El Marqués  
Caracas 1010  
VENEZUELA  
Tel.: 58 2 232 79 38  
Fax: 58 2 235 92 15  
E-Mail: accsi@ccs.internet.ve

Hugh Ward, Executive Director  
United Against AIDS International  
P.O. Box 3916, Grand Central Station,  
New York, NY 10163  
UNITED STATES  
Tel.: 718 639-5696  
Fax: 718 639-5696  
E-Mail: hure2@aol.com

## **Union des municipalités du Québec – Asociación Chilena de Municipalidades**

Raymond L'Italien, Directeur général  
Union des municipalités du Québec  
680, rue Sherbrooke ouest  
Bureau 680  
Montréal (Québec) H3A 2M7  
CANADA  
Tel.: (514) 282-7700  
Fax: (514) 282-7711  
E-Mail: rlitalien@umq.qc.ca

Senór Mario Rosales, Secretario Ejecutivo  
Asociación Chilena de Municipalidades  
Calle Luis Thjaler Ojeda 424 Esquina Lota  
(cerca Metro Tobalaba verada Sur)  
Providencia, Santiago,  
CHILE  
Tel.: (562) 655-1730  
Fax: (562) 655-1651  
E-Mail: achm@reuna.cl

# Information on Programmes that Facilitate Twinning

This appendix provides information on two programmes that promote and facilitate twinning.

## **EuroCASO Twinning Programme**

In the early 1990s, the European Council of AIDS Service Organizations (EuroCASO) set up a twinning programme. In 1999, EuroCASO altered the programme and re-launched it. The programme is designed to encourage and facilitate twinning among EuroCASO member organizations, and more particularly to develop partnerships between Eastern and Western European organizations. Some features of the EuroCASO Twinning Programme are as follows:

- The project promotes return visits by two persons from each organization. The visits are of short duration, usually 10-14 days.
- The twinning involves two organizations from within Europe, usually one from Eastern Europe and one from Western Europe, but it can involve two from the same region.
- EuroCASO provides support in several ways: in identifying organizations that have indicated that they need assistance or would like to contribute their expertise; in finding a suitable match; in helping to set up the projects; and in compiling a final report.
- Costs are kept low because the host organization provides the training sessions and other activities, and accommodation is arranged in people's homes.
- Participating organizations must find the necessary funding by themselves.
- EuroCASO has developed a twinning form for organizations to fill out if they are interested in participating; a contract for the two organizations to use to formalize their relationship; and an evaluation and action report form, to be used for a final report. EuroCASO planned to update these forms in 1999.

EuroCASO recommends that participating organizations share their experiences with other HIV/AIDS organizations by organizing "spin-off" seminars after their twinning project is over and by sending out a final report on the project's outcomes.

For more information, contact:  
Deborah Glejser, Regional Assistant  
European Council of AIDS Service Organizations  
Regional Secretariat  
Groupe sida Genève  
17 rue Pierre-Fatio  
CH-1204 Genève  
SWITZERLAND

Tel.: 41 22 718 60 26 or 41 22 700 15 00  
Fax: 41 22 700 15 47  
E-Mail: [eurocaso@hivnet.ch](mailto:eurocaso@hivnet.ch)  
Website: <http://www.hivnet.ch/eurocaso>

## **International Human Rights Internship Program**

The International Human Rights Internship Program (IHRIP), administered by the Institute of International Education in Washington, DC, United States, supports international training exchange projects for staff and core volunteers of human rights organizations in Africa, Asia, the Middle East, Latin America, the Caribbean, East Central Europe and the Former Soviet Republics. Most of the projects supported by IHRIP fall into the internships category, but IHRIP is also involved in on-site training and study tours.

For more information, contact:  
Ann Blyberg, Executive Director  
International Human Rights Internship Program  
Institute of International Education  
Suite 650, 1400 K Street N.W.  
Washington, DC 20005  
UNITED STATES  
Tel.: 202 326-7725  
Fax: 202 326-7763  
E-Mail: [ablyberg@iie.org](mailto:ablyberg@iie.org)

## A P P E N D I X V

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# E-Mail Discussion Forums on HIV/AIDS

The following is a list of e-mail discussion forums dealing with HIV/AIDS. If you are searching for a twinning partner, you may want to post a notice on one or more of these forums.

### **AFRICA AIDS NETWORK**

[af-aids@hivnet.ch](mailto:af-aids@hivnet.ch)

### **GENDER AND AIDS NETWORK**

[gender-aids@hivnet.ch](mailto:gender-aids@hivnet.ch)

### **HIV AND LAW NETWORK**

[HIV-Law-Approval@web-depot.com](mailto:HIV-Law-Approval@web-depot.com)

### **HIV AND HUMAN RIGHTS NETWORK**

[HIVLine-L-On@HIVLine.com](mailto:HIVLine-L-On@HIVLine.com)

### **HUMAN RIGHTS FORUM**

[human-rights@hivnet.ch](mailto:human-rights@hivnet.ch)

### **INTAIDS (INTERNATIONAL AIDS ISSUES)**

[intaids@hivnet.ch](mailto:intaids@hivnet.ch)

### **PLWHA NETWORK**

[plwha-net@hivnet.ch](mailto:plwha-net@hivnet.ch)

### **SOUTH EAST ASIAN AIDS NETWORK**

[sea-aids@hivnet.ch](mailto:sea-aids@hivnet.ch)

### **TREATMENT ACCESS FORUM**

[treatment-access@hivnet.ch](mailto:treatment-access@hivnet.ch)

# Partnership Agreement Between the AIDS Law Project and the Canadian HIV/AIDS Legal Network

The AIDS Law Project (South Africa) undertakes research, publishes materials, provides legal advice and litigates issues relating to HIV/AIDS and human rights. The Canadian HIV/AIDS Legal Network also undertakes research, publishes materials and undertakes other activities to promote awareness and understanding of legal, ethical, and policy issues raised by HIV/AIDS.

In recognition of the global nature of the HIV/AIDS pandemic, the AIDS Law Project (South Africa) and the Canadian HIV/AIDS Legal Network hereby unite in a spirit of partnership to achieve their respective missions, goals and objectives by:

- Working together to improve awareness and understanding of the legal, ethical and human rights impact of the global spread of HIV/AIDS;
- Promoting regular communication between both organizations at both management and operational levels on the planning, implementation and achievement of each organization's goals, objectives and activities; and
- Undertaking joint activities including research, publications, the creation and support of networks, conferences, and other educational activities.

To achieve the mutual benefits of this partnership, the Canadian HIV/AIDS Legal Network and the AIDS Law Project undertake to:

- Declare and promote this partnership within each organization and in both official and informal communications of each organization;
- Facilitate communication between each organization, its staff and volunteers at distance and through personal visits.
- Integrate this partnership into the work-plan of each organization, its staff and volunteers.

This agreement is intended to promote a vision and does not of itself create any expectation of legal or financial commitment of either organization. This agreement may be terminated with due notice in writing by either the AIDS Law Project or the Canadian HIV/AIDS Legal Network.

### **Actions to be undertaken by both Organizations**

1. *Declare and promote this partnership within each organization and in both official and informal communications of each organization*
  - a) Adapt official letterhead to include the following Partnership Statement:  
'The Canadian HIV/AIDS Legal Network is a partner organization of the AIDS Law Project (South Africa)' or  
'The AIDS Law Project is a partner organization of the Canadian HIV/AIDS Legal Network.'

- b) On the opening page of the organization web site, or as appropriate, place the logo of the partner organization with the Partnership Statement and a link to the text of the Partnership Agreement and the website of the partner organization.
  - c) Include the Partnership Statement and the logos, as appropriate, in all publications media releases and other materials of each organization.
  - d) Include the Partnership Statement in the signature files of the electronic mail accounts of each staff member of each organization, as appropriate.
  - e) Provide all staff and volunteers with a copy of the Partnership Agreement and invite discussion of the purpose of the Agreement, and the nature and activities of the Partner Organization, as part of routine training or induction.
  - f) Promote the Partnership Agreement in each organization by visual media and other means.
2. *Facilitate and maintain communication between each organization, its staff and volunteers at distance and through personal visits.*
- a) Provide the Partner Organization with a list of staff and volunteers and, as appropriate, telephone and email details, and a short biographical note with a photograph. Update this material when necessary.
  - b) Exchange annual reports, publications and other printed and electronic material as published. Provide blanket written authority to the Partner Organization to use and reproduce this material with an appropriate acknowledgement without special approval.
  - c) Explore other ways to promote the Partnership at distance, such as teleconferencing and videoconferencing on issues of joint interest and email updates on staff and volunteer changes and developments.
  - d) Promote staff and volunteer visits and exchanges between the Partner Organizations, both for special events such as national, regional and international conferences and meetings, and for routine training and development.
3. *Integrate this partnership into the work-plan of each organization, its staff and volunteers.*
- a) Incorporate a presentation of this Partnership Agreement into the strategic planning and visioning workshops of each organization.
  - b) Identify a lead organization, where appropriate, and include each project and activity in the work-plan of each organization
  - c) Amend the job description of the Executive-Director of each organization to include the promotion and implementation of this Partnership Agreement.
  - d) Ensure each staff member is accountable in his or her job description or personal work-plan, as appropriate, for the respective component of the organizational work-plan that implements the Partnership Agreement
  - e) Incorporate a reference to this Partnership Agreement into the job description or activities, as appropriate, of volunteers in each organization.
  - f) Regularly report to the Partner Organization and in annual and other reports, as appropriate, on steps taken to implement the above.
  - g) Review and extend the vision of the partnership periodically.

# Annex

## Canadian HIV/AIDS Legal Network

### Mission Statement:

The Network is a charitable organization engaged in education, legal and ethical analysis, and policy development. We promote responses to HIV/AIDS that implement the International Guidelines on HIV/AIDS and Human Rights; respect the rights of people with HIV/AIDS and of those affected by the disease; facilitate HIV prevention efforts; facilitate care, treatment, and support to people with HIV/AIDS; minimize the adverse impact of HIV/AIDS on individuals and communities; and address the social and economic factors that increase vulnerability to HIV/AIDS and to human rights abuses.

We produce, and facilitate access to, accurate and up-to-date information and analysis on legal, ethical, and policy issues related to HIV/AIDS, in Canada and internationally. We consult, and give voice to, Network members and a wide range of participants, in particular communities of people with HIV/AIDS and those affected by HIV/AIDS, in identifying, analyzing, and addressing legal, ethical, and policy issues related to HIV/AIDS. We link people working on or concerned by these issues. We recognize the global implications of the epidemic and incorporate that perspective in our work.

## The AIDS Law Project

### Mission Statement:

*Discrimination against people with HIV and AIDS undermines society's efforts to prevent HIV infection and limit the impact of the HIV/AIDS epidemic on our society. Discrimination is also contrary to internationally accepted principles of human rights. The AIDS Law Project operates according to the principles set out in the United Nations International Guidelines on HIV/AIDS and Human Rights.*

The AIDS Law Project aims to:

- Carry out litigation to counter wrongs that have occurred and, where possible, to establish legal precedents that prevent them from recurring.
- Offer free legal advice that will empower people living with HIV and AIDS to seek legal remedies in response to acts of unfair discrimination.
- Carry out research to support policy formulation and bring about practices that prevent discrimination.
- Produce media that creates an awareness of rights in government and civil society and promotes effective lobbying and advocacy.

The ALP is based at the Centre for Applied Legal Studies, University of the Witwatersrand. The ALP is committed to a code of professional ethics, to respecting confidentiality and to the principle of the maximum inclusion of people living with or affected by HIV and AIDS. We will oppose all forms of unfair discrimination and promote a culture of human rights and equality for all.