



SAT

Southern African AIDS Trust

Supporting Community Responses to HIV and AIDS in Southern Africa

SOUTHERN AFRICAN AIDS TRUST

SWW BRIEFING NOTES: MENTORING RELATIONSHIPS

HARARE: 2003

Mentoring Relationships

1. Introduction

Organisation to Organisation (OTO) mentoring is a tried and tested SWW mechanism to assist SAT partners to introduce new activities or approaches into their work or to provide capacity building support for new community AIDS initiatives. To be effective mentoring should be a continuous process and part of a comprehensive programme of capacity building through the SWW that includes study visits, field support and training. OTO mentoring is conducted by organisations implementing AIDS programmes of proven effectiveness with a demonstrated commitment to serving the poor and most vulnerable groups in their communities. There are different methodologies and time durations used in the mentoring process. There is the long term nurturing of new initiatives by established organisations; and the shorter term organisational planning and design with options for continued adhoc support as required. Longer term relationships involve frequent reciprocal visits, electronic communications and consultations, as well as personnel training exchanges. The learning culture is strengthened and the learning curve shortened through joint strategy and problem solving activities.

It is important to establish very early in the process, clear channels of communication and roles and responsibilities between the two organisations. This will avoid conflict of interest and over involvement by the mentoring organisation as the new organisation develops.

The mentoring role also benefits the mentoring organisation in a number of ways: it broadens their experience; provides enriched work activities and contracts; brings national, regional and in many instances international recognition to the organisation; sharpens the way they think about activities and programmes and improves the organisations own institutional and programming skills.

2. Objectives of the mentoring relationship

- Provide practical capacity building support for community AIDS initiatives that is tailored to the specific needs of the recipient organisation.
- To assist organisations avoid fundamental errors and time-wasting.
- To shorten the learning curve by avoidance of fundamental errors and time-wasting.

3. Criteria for mentoring organisations

The organisation must:

- have a thematic, geographic and institutional profile consistent with SAT plans and priorities;
- demonstrated infrastructure and capacity development transfer capabilities.
- have the desire, organisational stability and philosophy to share their knowledge and expertise.

- ❑ have detailed knowledge of their local community context; and have the confidence of their constituency.
- ❑ have the ability to sustain mentoring follow-up of new or inexperienced organisations.
- ❑ work methodically & systematically and have a strong emphasis on accountability;

4. Methodology of OTO Mentoring

The visiting and host organisations (mentor and mentored) are carefully matched to ensure the relevance of the concepts and skills to be transferred. Mentoring can take place at local, national and regional level across geographic borders.

Mentoring relationships may be established through:

- Introductions through a third party (donor).
- A request for support by a downstream initiative (local area networks).
- Through the experienced organisations activities in the community.
- Identified through base line assessments of potential new SAT partners.

The mentoring relationship can take place over a period of several weeks to several years. During this time, staffs of the mentoring organisations help design programmes, supervise and monitor the activities, and solve technical and administrative problems on the basis of need and demand. Mentoring often develops into long-term organisational relationships of mutual benefit to both parties

Mentoring may take place on an organisational basis or in specific thematic programming areas, such as home care, counselling or child sexual abuse programming.

Through mentoring the learning culture is strengthened, with information, experiences and insights shared through joint strategy development and problem solving activities. Through this nurturing process programmes can be replicated, resulting in a shortened learning curve for the younger organisation. It also allows the mentored organisations to grow in capacity to become mentoring partners themselves.

Mentoring relationships tend to germinate downstream initiatives in their geographic areas, which SAT assists through direct or delegated seed / nested funding. Once the relationship has been established the mentoring organisation will assist or apply for funding on behalf of the new initiative. The funding can be nested within the mentoring organisations contract and administered until such time as the new initiative has the capacity and resources to function autonomously. SAT will then develop a separate contract with the autonomous organisation.

The concept of 'Organisation to Organisation' mentoring is increasingly being adopted by other groups outside of the SWW.

5. Organisation to organisation mentoring: *Lessons Learned*

- There is a shortened learning curve for developing organisations.
- Ensures local cultures and belief systems are respected.
- Provides a positive competitive environment.
- Ensures the rapid replication of small scale initiatives by local transfer of skills.
- Improves the effectiveness of community AIDS programming by helping to promote the use of appropriate benchmarks.
- Promotes a culture of openness and accountability within community organisations.
- Expands the pool of organisations capable of delivering AIDS-related training and programme support services of a very concrete, practical nature.
- Results in the production of appropriate training and information materials, identified, developed and produced for and by community level workers.

Mentoring organisations become attractive to many other agencies which can result in a wider donor base and positive growth for them. It also enables resource provider

agencies to support to new emerging organisations, rather than the usual practice of always working with established organisations.

6. Some of the less positive issues that can arise from mentoring relationships include:

- ❑ The ‘letting go’ (empty nest syndrome) process is a stressful and difficult transition for many mentoring organisations. This happens even when the relationship will continue, though at a different level of intensity. . The mentoring organisation need time and support to help them through the weaning process.
- ❑ The mentored organisation may develop a ‘dependency syndrome’ if the mentoring process is not adequately monitored to ensure that adequate capacity is built. Dependency may hinder the new organisation from developing adequate capacity that will result in failure to mature/grow.
- ❑ Increased demands by numerous agencies for mentoring organisations to increase their mentoring role. Organisations need to develop the ability to know what they can reasonably agree to and what they can adequately manage.

7. Agenda

The agenda will depend on the type and duration of mentoring support to be provided. Different agendas will be developed for different types of mentoring support.

The following one is an example of a one week mentoring support for organisational project planning and implementation design.

9. Agenda template (example)

The agenda example can be amended to either increase or decrease the number of activities, time allocation for the activities and the content. The decision will depend on the level of organisational absorption capacity and time available. Decisions on the final agenda are made in consultation with the facilitator, the CPO and include the SWW technical team as appropriate.

Programme Activities	Purpose
Meeting with organisational stakeholders that includes: staff members, executive committee, community leaders and volunteers to brief on the weeks activities, allocate tasks and responsibilities and ensure everyone is	To brief stakeholders on the objectives of the weeks activities; identify who will be involved and the extent, individual roles and responsibilities. (This may be an update as briefing will be done by the organisation for stakeholders as part of the preparation).
Conduct a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis of organisation	To identify what is and what is not possible and what could have an influence on the positive or negative outcome of the programmes.
Practical mapping exercise in the community Defining the catchment area for programmes - what is and what is not possible; who else is working in the area on similar activities (potential strategic alliances); what resources are available; risk areas; targeting activity areas etc.	To allow organisation members to go out into the community to identify resources, location of important establishments and make contact with relevant people that will assist to make a positive impact on the outreach work etc.
Mapping and zoning chart work. (Ariel maps or local area maps can be used)	To plot the positions of institutions for support and areas for targeting activities: e.g. bars, churches, schools, markets, volunteer homes, organisation in relationship to activity area etc.

Recruitment of volunteers	To identify where they live, where they will work, criteria for selection.
Training of volunteers	Training is long term and depends on the activity area. Only discussion on needs and how the training will be conducted can be covered in this first week. Structure for weekly training and meetings established.
Programme implementation	Includes planning (timetable), establishing referrals and linkages, briefing and debriefing meetings (weekly or monthly), identification and solving of difficulties arising from outreach work.
Reporting and record keeping	Basic record keeping and reporting structures established appropriate to level of volunteer capacity
Quality assurance	Supervision, monitoring and evaluation of activities established
Establishment of support systems	Support structures established for stress management

9. Facilitation

The number of facilitators from the mentoring organisation depends on the expertise of the organisation and the distance between the mentoring and mentored organisations. Where the two organisations are in close proximity different people from the mentoring organisation may be involved at different stages of the mentoring process. This will depend on the organisational or programming needs of the organisation receiving support. Where the mentoring relationship is taking place at national level or across national borders, then usually only one person from the mentoring organisation provides support.

10. Report

Reports of the mentoring process must be submitted by both the mentoring and mentored organisations.

- The recipient organisations report should include the process that they have gone through, the challenges, constraints, achievements and how the new skills will be utilised. The report must be one to two pages long and submitted to SAT no later than 10 days after the completion of an activity. For longer term mentoring a specific report on the mentoring process is submitted six monthly and annually or at the completion of an important activity.
- The mentoring organisation can submit two brief reports if desired. One is the general report of the mentoring relationship or activity. This report is for general records and includes the mentoring support provided, achievements and constraints and recommendations for the way forward. Facilitators may also submit a confidential report' on sensitive issues arising during the mentoring relationship or that need to be addressed at management level. This information may not be appropriate to include in the general report. The confidential report must be submitted separately. A decision will be made by SAT on how to sensitively resolve the issues arising.

11. Organisation of the Mentoring Process

11.1 Responsibilities

National Level Organisational Mentoring

The **Country Programme Officer** is overall responsible for the success of the mentoring process by ensuring that:

- A SWW contract is developed for both the mentoring and mentored organisation.
- Planning the process or activity and ensuring it takes place.

- The Terms of Reference are developed in consultation with both organisations, and as required with technical input from the SWW technical team. (example of TOR attached)

The **Mentoring organisation** is responsible for:

- The technical input for the mentoring relationship in consultation with the CPO and the SWW regional team.
- Development of a programme in consultation with the organisation to receive their support, the CPO and the SWW technical team.
- Their own travel and other logistical arrangements with advice and support from the SAT country office.
- A report of the process with recommendations for further capacity development that may be required.

The **Mentored organisation** is responsible for:

- Inviting all participants to be involved in the mentoring activities
- All local administration and logistical arrangements
- Compiling a budget for submission to the CPO
- Purchasing all stationery and materials necessary for the activities

Cross Border Organizational Mentoring

The **Country Programme Officer** in the recipient country is overall responsible for the success of the mentoring process by ensuring that:

- The mentoring takes place.
- The Terms of Reference are developed in consultation with both organisations, and as required with technical input from the SWW technical team. (example of TOR attached)
- The budget for the local costs are in the appropriate partner's SWW contracts
- Assists with advice and the logistical support for the mentoring organisation.

The **SWW technical team** is responsible for the:

- Consultations with the mentoring organisation and logistical arrangements in consultation with the CPO and the recipient organisation.
- Checking the budget for the production of the SWW contract.
- Development of the agenda with the mentoring organisation, in consultation with the CPO and the organisation to receive the support.
- All logistical arrangements for the mentoring organisation with advice and support from the SAT country office. This includes travel arrangements, accommodation, per diems, and visas. The SWW AA will liaison closely with the mentoring organisation and the recipient country AA on all arrangements.
- Materials for the mentoring relationship are available.

The **Country Programme Officer** in the mentoring organisations country is responsible for:

- Development of the SWW contract in consultation with the SWW technical team.

The **Mentoring organisation** is responsible for:

- The technical input and the development of a programme for the mentoring relationship in consultation with the SWW technical team the CPO.
- Their own travel where appropriate and other logistical arrangements in close consultation with the SWW AA.

- ❑ A general report of the process with recommendations for further capacity development that may be required. A facilitator's confidential report as necessary.

The **Mentored organisation** is responsible for:

- ❑ Inviting all participants for the mentoring activities
- ❑ All local administration and logistical arrangements
- ❑ Compiling a budget for the activity and submission to the CPO
- ❑ Purchasing all stationery and materials necessary for the activity.

11.2 *The Budget (example of budget attached)*

The budget for the mentoring relationship must be included in both the mentoring and recipient organisations SWW contract. The mentoring organisations contract will include facilitation fees and expenses for all related costs that could include travel, accommodation, per diems and materials. The recipient organisation's budget must include funding to host the activity that includes travel, meals, refreshments and stationery for participating stakeholders,. Accommodation and venue hire must be addressed as necessary.

11.3 **Participants**

The types and numbers of participants depend on the type of mentoring to take place.

- ❑ Long term organisational mentoring

Involves all staff members of the recipient organisation at different times in the mentoring process. To avoid conflict of interest and over involvement by the mentoring organisation, clear channels of communication must be established early in the process between the two organisations with roles and responsibilities clarified.

- ❑ Short term organisational mentoring

Project planning and implementation design mentoring involves all programming staff members and community volunteers and other organisation stakeholders.

For administrative, financial or activity specific mentoring, the relevant staff should be involved.

CPOs and recipient organisation to discuss and agree on participant list before invitations are sent out. This can be done in consultation with the mentoring organisation and the regional SWW team when necessary.

11.4 *Venue*

The venue should be the organisations premises, but will depend on the type of mentoring activity. Community outreach planning and design activities involving community volunteers can if necessary be conducted at a venue within the community (district council or church facilities) etc.

The hosting organisation is responsible for identifying and booking of the venue. It should be reasonable priced, with clean, hygienic accommodation and meeting areas that are conducive for a large group of people to meet.

11.5 **Meal Allowances and Incidentals**

Mentoring relationships do not usually require incidental allowances and transport only provided if participants have to travel long distances. Meals and refreshments are provided where stakeholders are involved.

Should include incidental allowances be necessary, they must be calculated according to the hosting organisations policy and not according to the Canadian Treasury Board guidelines. The Canadian Treasury Board guidelines will only be used at organisational level if the organisations allowance rate exceeds it. This should be discouraged at all times.

11.6 Travel

Travel arrangements for participants should be made by the hosting organisation wherever possible. Mentoring activities usually take place at organisational level or in the implementation catchment area. This minimises the necessity for travel allowances.

12. Evaluation of the meeting (copy attached)

The SWW evaluation form is to be completed by all participants at the completion of all SWW activities.

The evaluation forms must be analysed by the hosting organisation. The analyses and completed forms must then be submitted to the CPO. The CPO will retain and keep on file the completed forms and submit only the analysis to the Regional SWW, Harare office. The hosting partner may, if they so desire, make copies of the completed evaluation forms for their own records.