# SOUTH-TO-SOUTH COLLABORATION

# Lessons Learned

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Centers for Disease Control and Prevention
National Center for Chronic Disease Prevention and Health Promotion
Division of Reproductive Health

U.S. AGENCY FOR INTERNATIONAL DEVELOPMENT
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# Executive Summary

This report presents lessons learned from a study of activities designed to improve collaboration between, and build capacity within, developing countries and reduce their reliance on external technical assistance from developed countries. In this report, the term “Northerners” is used to refer to donors and their cooperating agencies from developed countries, while “Southerners” refers to persons and organizations in the developing world. The United Nations has taken the lead in referring to collaborations between Southerners as “South-to-South (S-to-S),” and the United Nations Centers of Excellence have recently been renamed the South-South Centers.

The term “S-to-S collaboration,” as defined in this study, means the exchange of expertise between individuals and organizations in developing countries. In its broadest sense, it also facilitates capacity development when needed (i.e., when the required skills and experience do not yet exist locally). In this way, it becomes an important means of building on donor investments already made in a country.

Although some countries have indicated that they prefer receiving assistance from Northern organizations, many donors and their partners value S-to-S collaboration as a means of building programmatic self-sufficiency. S-to-S may be provided by individuals or institutions on a one-time basis or as part of a long-term relationship, and it may involve both private sector and governmental entities. Organizations that receive funding from donors are not excluded from participating in S-to-S exchanges; in fact, donor funding is usually necessary to support such collaboration. The issues of continued financial viability and programmatic sustainability must both be addressed by program planners who intend to use S-to-S collaboration in their projects.

Findings and recommendations described in this report flow from key informant interviews with 80 donors, United States Agency for International Development contractors, and Southern nationals in various sectors—predominantly in the population and health sectors—as well as from a review of such documents as project evaluations and descriptions of current S-to-S collaboration activities. These sources did not provide specific criteria for judging the success of collaborations; rather, they gave general observations about what works best. These findings should be useful to members of the international population, health, and nutrition communities by suggesting possible future directions for incorporating S-to-S collaboration in development projects. When a clear need for action is identified and embraced by the recipient organization or individual, such a collaboration has the potential to help build local or regional infrastructures and skills that contribute to technical, programmatic, and institutional sustainability.

Study findings show that the most commonly identified approaches for S-to-S collaboration are networks, study tours, technical assistance and training, and meetings and conferences. The selection of approaches (or a combination of approaches) to use for any S-to-S collaboration should be initiated and guided more by the needs of the organization, country, or region receiving the technical assistance and training than by the funding entity. For this reason, it is critical that project designs allow flexibility for Southern partners to determine the most appropriate approaches to use.

This study shows that, regardless of the S-to-S approaches used, S-to-S collaborations should have

- Clearly identified objectives.
- Appropriate, committed participants.
- Ongoing monitoring.
- Follow-up evaluation.

Because one-time events have less potential for capacity building than multi-component collaborative activities, many S-to-S collaborations also benefit from **longer-term relationships** with opportunities for **follow-up activities** and **continued funding,** where necessary, either from donors or in the form of in-kind contributions. Too often the importance of the last two characteristics is underestimated. While S-to-S activities will not always require sustained collaborations, they often benefit substantially from making long-term investments and committing resources to establish and maintain relationships over time. Recognizing and acting upon these and other lessons learned about S-to-S collaborations can help developing countries widen their base of technical expertise, strengthen local capacity, and build self-sufficiency.

# Contents

# Introduction

The term South-to-South (S-to-S) collaboration, as used in this document, is defined as the exchange of expertise between individuals and organizations in developing countries, whether locally (in-country) or regionally (between countries). Because S-to-S collaboration is increasingly viewed as an important means of building self-sufficiency, the USAID/Washington Office of Population requested that CDC's Division of Reproductive Health conduct a study of lessons learned in past S-to-S collaborations. This study was designed to determine whether similar techniques would be useful in upcoming projects and to provide recommendations to donors and host organization governments on how best to use S-to-S collaborations.

S-to-S assistance may be provided by individuals (e.g., staff members of Southern[1] institutions, project resident advisors, subcontractors of cooperating agencies) or by institutions, either on a one-time or an ongoing basis. Assistance may be provided by either private sector or governmental entities. Donor organizations may provide support or be involved as partners, but the collaborative activity should be planned, directed, and carried out to the greatest extent possible by Southerners. In this study, the term "S-to-S collaboration" is used in its broadest sense to include facilitating the development of Southern expertise and experience when these do not already exist in projects and programs.

S-to-S collaboration is not a recent development. Southern countries have participated in collaborations and exchanges for many years. Intergovernmental organizations such as the United Nations Population Fund (UNFPA) and international non-governmental organizations, particularly the International Planned Parenthood Federation (IPPF), have long traditions of using Southern expertise. Study tours, training sessions, and regional workshops are common to many health and population projects. This paper addresses ways to improve these collaborations and discusses how donors can facilitate and integrate these lessons into their projects so that S-to-S activities contribute to local capacity development[2] and program sustainability.[3]

The following sections describe the methodology used in this study and present a detailed description of each approach to S-to-S collaboration. Key lessons learned that were reported during the interviews are listed. The section titled "Discussion" describes the overall strengths and weaknesses of S-to-S collaborations and discusses options for funding and structuring projects with S-to-S components, locating needed skills, and marketing implications for S-to-S activities. Specific recommendations for project designers and implementers of S-to-S activities are listed in the section titled "Recommendations for Project Designers and Implementers of S-to-S Collaboration."

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[1] *Northerners and Southerners:* The term "Northerners" is used to refer to donors and their cooperating agencies from developed countries, while "Southerners" refers to persons and organizations in the developing world. The United Nations has taken the lead in referring to collaborations between Southerners as "South-to-South," and has recently changed the name of the United Nations Centers of Excellence to the South-South Centers.

[2] *Capacity development* emphasizes the development and empowerment of individuals and organizations. Institutional development may involve a longer-term process of building skills, institutionalizing them, and making organizational changes. Capacity development is both a means and an end to sustainable development; it empowers individuals and organizations to realize their potential and to better use their capabilities, as well as to ensure program ownership and sustainability.

[3] *Sustainability:* The USAID Web site refers to sustainability as follows: "USAID has defined its major functions and operations in terms of sustainable development, i.e., actions that lead to a lasting increase in the capacity of a society to improve the quality of life of its people." This lasting increase in capacity may occur in programs and institutions that are sustained with donor assistance or, at a later stage, are sustained financially through the program's or institution's own resources. Thus, sustainability can refer to programmatic or financial sustainability. Clearly, progress toward sustainable infrastructures and capacity requires incremental steps. The use of the word "sustainability" in this paper will distinguish between the two types of sustainability (i.e., programmatic and financial).

# Methodology

This study examines general approaches for S-to-S collaboration, summarizes what many of the people interviewed found to be workable and why, and describes the implications of the lessons learned from S-to-S collaboration. This study was not based on formal evaluations, nor was it intended to provide in-depth analysis of each approach or to describe every organization or project that has been involved in S-to-S collaboration. It does not identify specific criteria for judging the success of collaborations; rather, it summarizes general observations about what works best.

Findings and recommendations flow from two sources of information:

- *Interviews with 80 donors, contractors, and Southern nationals in various sectors, predominantly in health and population.* Personal contact lists and personnel directories provided names for the first round of interviews, and many of these initial discussions resulted in referrals for subsequent interviews. Nearly all interviews lasted approximately one hour and took place either in person or by telephone.

- *Review of documents provided by donor organizations and cooperating agencies (CAs).* Such documents included project evaluations (primarily in the fields of population, health, and nutrition) and descriptions of current S-to-S collaborative activities.

While these interviews and document reviews yielded much useful information, we must note several caveats for interpreting study results:

- *Most projects, even short-term study tours, are complex.* They may take place over many years, involve many people, or cover many activities. As a result, this study does not provide a complete picture of all projects described.

- *Individuals reported on project experiences based on their memories and opinions about what took place.* Respondents had unique perspectives, and not all individuals were able to provide detailed, documented support for their statements. Even when several people from a particular project or organization were interviewed, the experiences they reported may not represent the organization as a whole. This is especially true for large donor organizations.

- *The examples we present are not completely representative of all S-to-S collaborations that have taken place, nor is the study based on a scientific sampling of such collaborations.* Rather, these were the examples presented during the course of the interviews.

- *Representatives of large, multinational private voluntary organizations (PVOs)—such as CARE, Save the Children, or World Vision—were not interviewed.* While it is important to acknowledge that these organizations often play a major role in S-to-S collaborations, it was beyond the scope of this study to examine their activities.

Despite these caveats, we believe that the diverse and knowledgeable representatives who were willing to share their experiences and insights provided us with a reasonably comprehensive basis for this presentation of findings and recommendations for consideration by the population and family planning, health, and nutrition communities.

# Description of Approaches and Key Lessons Learned

This section discusses topics that researchers believe should be considered when designing projects that will include S-to-S collaboration. It describes the various approaches to S-to-S collaboraÄtion, lists key components of successful programs, and reviews some important lessons learned.

Although there are many different approaches to S-to-S collaboration, for the purposes of this study, they have been grouped into four primary categories: networks, study tours (including high-level policy visits), training and technical assistance (including computer-assisted tools and distance learning), and meetings and conferences.

- *Networks.* Individuals from various programs and countries come together and share information regularly. Each network develops its own methods of communication among members, including the use of newsletters, e-mail, conferences, semiÄnars, and Internet discussion groups. Although networks may be formed with Northern or donor organization assistance, the primary emphasis should be on building the capacity of Southern members to independently operate networks that support S-to-S collaboration.

- *Study tours.* Groups visit other program sites (either within their own country or in another country) to learn about activities that may beneÄfit their own programs. Such tours may include high-level policy visits that give politicians and senior professional staff members opportunities to learn from successful programs or visits by less senior staff members to observe effective or innovative program techniques and approaches.

- *Training and Technical Assistance (T/TA).* For all types of collaborative activity, T/TA is important for capacity building. Formats include classes and demonstrations, workshops, seminars, on-the-job instruction, mentoring, fellowships, and internships, as well as computer-assisted tools and disÄtance learning. A preliminary step may include bringing in Northern experts to “train the trainÄers,” thereby developing the capacity of Southern individuals and institutions to provide assistance to other Southern entities.

- *Meetings and conferences.* Gatherings of Southern individuals or organizations may be ongoing or one-time events, regional or interregional, to permit the sharing of information in a group setÄting. Meetings may lead to the development of collaborative projects or may simply provide an opportunity for sharing innovative ideas and best practices. Northern participants may be involved as partners in the collaborative process, but Southern “ownership” is the key to success of such gatherings.

Few programs use only one approach to S-to-S colÄlaboration. Instead, they select a mix of approaches, each with strengths and weaknesses that make it more or less appropriate for a particular purpose. For example, research projects may benefit from using approaches that emphasize equal partnership on joint research activities by incorporating study tours in the program. On the other hand, manageÄment-oriented service delivery projects may benefit more from using approaches that emphasize skill-building through information exchange.

As many Southern interviewees stated, there is no magic formula for determining which mix of approaches is needed from among all the possible choices. The following are some of the factors that may be considered when selecting which combinaÄtion of approaches to use: program needs and preferences, project type and context, goals and objectives, availability of resources, and nature of the skills being transferred.

The best mix of approaches also will be determined, in part, by where the appropriate skills can be found or developed. If capacity is to be built within non-governmental organizations (NGOs), universities, or networks, the preferences and infrastructures of those organizations will help determine the best approaches to use.

The review of lessons learned revealed that whichever approaches are selected, **S-to-S collaboration, in general, is more successful when the following activities are incorporated:**

- *Identify clear objectives for the S-to-S activity.* Nearly everyone interviewed mentioned the need for establishing attainable objectives that the colÄ laborators can meet by carrying out specific, conÄ crete activities. Southern partners reported little interest in, and much resistance to, proposed theories and ideas that aren't realistic or the inclusion of activities that are not tailored for specific settings.

- *Select the most appropriate participants.* Again, this was a commonly mentioned requirement for S-to-S success. Participants should be able to contribute positively to the process and help bring about the desired results. Those with too much or too little authority, who are uncommitÄ ted, or who lack political support were cited as ineffective or inappropriate participants. Finding committed participants may be difficult, but one solution has been for project planners (both Northerners and their Southern counterparts) to create teams with a mix of skill levels and authorÄ ity. Another solution has been for planners to carefully select participants with applicable skills and abilities and to restrict collaborations to partners who can directly contribute to the achievement of the collaboration's objectives.

- *Conduct monitoring and follow-up evaluation.* This study found an overall lack of monitoring and evaluation of S-to-S activities. No one has produced a comprehensive meta-analysis of S-to-S trends, due in part to the dearth of well-documented collaborations. To raise awareness among program designers and implementers of the possibilities that exist for many fruitful colÄ laborations, descriptions and analyses of successÄ ful individual S-to-S collaborations should be more widely disseminated than they have been in the past.

  Partners in Population and Development (PPD, or the Partners project), an organization formed to facilitate S-to-S exchanges in the area of reproÄ ductive health and population, is making an effort in this direction by incorporating a moniÄ toring and evaluation component in its work plan. PPD hopes that the information gained through this process will (1) improve the quality and outcomes of the exchanges and (2) provide a justification for dedicating more resources to this capacity development mechanism. In addition, PPD has produced a book entitled *South to South: Developing Countries Working Together on Population and Development,* which provides a historical overview of the development of S-to-S cooperaÄ tion in the reproductive health and population sector, analyzes opportunities for strengthening and expanding S-to-S collaborations, and examÄ ines issues related to resource mobilization for these activities.

- *Foster longer-term relationships between partners.* This study found that collaborations involving longer-term partnerships, rather than one-time exchanges, are generally the most likely to result in the development of sustainable programs. People interviewed reported that when S-to-S partners maintain contact over a period of time, there are more opportunities to follow up with questions, identify new areas for sharing lesÄ sons, and garner support for the development of new initiatives. Longer-term relationships also are more likely to have adequate resources for folÄ low-up TA than are isolated activities. In addiÄ tion, interviewees reported that even though one partner may have more to offer during the initial stages of the relationship, longer-term relationships are more likely to produce collaborations where both parties learn as well as contribute to increased capacity development. The establishÄ ment of relationships that involve two-way exchanges over time may be the single most sigÄ nificant reason why S-to-S collaboration can make an important contribution to development.

- *Obtain continued funding for S-to-S activities.* Given most developing countries' resource needs, longer-term support (donor funding or contribuÄ tions from other sources) may be required to realize the benefits and potential of some S-to-S activities. The extent of the costs will depend on how the role of S-to-S is defined and implementÄ ed in a project. For example, if a Southern TA provider from the same region is used to provide assistance, replacing North-South assistance, travel costs will be less. However, if the project includes interregional travel, uses consultants with Northern-scale salaries, or requires extensive institutional capacity building, there may be no short-term cost savings in using an S-to-S approach. Replacing North-to-South assistance with S-to-S collaboration is not a quick, easy solution, but it has the potential to improve long-term development if all parties involved have sufficient political will and resources to sustain it.

The following, more detailed descriptions of each approach may be helpful in deciding how to carry out successful S-to-S collaborations.

SOUTH-TO-SOUTH COLLABORATION

# NETWORKS

## Description

While donors often are locked into working along national lines (rather than with broad regional programs), networks and associations can create multinational entities that transcend singular national issues. While their missions vary, networks typically exist primarily to achieve one or more of the followÄ ing objectives: (1) raise awareness, (2) share inforÄ mation, (3) prompt action, (4) develop capacity, (5) conduct research, or (6) conduct advocacy campaigns.

Networks have a variety of forms, depending on their missions and strategic objectives, and they often evolve from one form to another. They may be designed as linkages between interested individuÄ als or as institutional relationships between organiÄ zations. Networks may facilitate the involvement of individuals in universities, government departments, NGOs, or the private sector. Whether a network exists to connect individuals or institutions or both, all network members should have common interests and share experiences and information on specific program activities on a regular basis to enhance long-term performance improvement. Contact between members may be maintained through newsletters, updates, or computer links. Some networks also host annual or regional membership meetings.

Networks may be simple or complex, formal or informal, low or high cost. They may have a central office or operate only through electronic communiÄ cations. No matter how simple they start out, however, the cost of maintaining them, in terms of staff time and budget, should not be underestimated.

For some networks, a key objective is developing the capacity of its member organizations through work with a few select institutions. Local or regional conÄ sultants who are available to provide TA to other network members may be a part of the network.

Other networks have taken on the role of improving the consultation skills of Southern technical experts so they can share their expertise more effectively. All network-associated participants in this study reported that Southern staff members need better consulting skills because simply having technical experience does not automatically translate into the ability to share and transfer it.

Other networks offer grants, fellowships, and study tours to develop their members' skills. In short, a network may include all of the S-to-S approaches, or it simply may involve more limited activities such as maintaining a mailing list and sending out information updates. Electronic communications (computer listservs, Web sites, e-mail, and faxes) have contributed to the proliferation of networks.

The International Clinical Epidemiology Network (INCLEN) is an example of how networks can successfully evolve. INCLEN was established 20 years ago to promote the practice of evidence-based medicine in developing countries. During its first phase, the program built strong clinical epidemiology skills within one institution. The second phase transferred the locus of training to several regions in that country to further develop local capacity in clinical epidemiology skills. The third and current phase focuses on multi-center studies and on strengthening skills related to priority health issues within the network.

As this example shows, when networks work well they typically evolve over time, building on previous investments in expertise and promoting mutual trust and solidarity among their members. Networks also offer opportunities to obtain funding from diverse sources because they cut across borders and programs.

## Key Lessons Learned

- *Successful networks require joint planning and programming by all partners.* Although this lesson is not specific to networks, interviewees stated that this was one of the most important lessons learned. For example, an evaluation of the USAID-funded Regional Economic Development Services Office/East Southern Africa (REDSO/ESA) Health Network Strategy (HNS) found that its success was due to four key principles, two of which were to engage all partners in joint planning and programming and to include local counterparts in every stage of the network development.

- *Networks should be formed around key topics of common interest and have clearly defined goals.* Common interests not only bring a network together but also create and sustain focus and energy. The common interests should be identified by the Southern partners and be expressed in the network's strategic objectives.

- *To ensure Southern ownership, networks should place emphasis on local capacity.* To support their role in facilitating S-to-S collaboration and to ensure their sustainability, networks must commit a large percentage of resources to local organizations. Resources should be managed locally and, to the extent possible, be spent locally. For example, evaluations of both the West African Forum Regionale d'Analyse et de Concertation (FRAC) and HNS networks recommended that more emphasis be placed on developing African capacity to manage the network. As a result, FRAC hired an African to be president of this organization.

- *Skills that network members need should be well defined.* When network developers fail to identify the skills its members need, they may not recruit or attract members that can help the network achieve its goals. For example, staff members of the International Network for the Rational Use of Drugs (INRUD) reported that the project initially misidentified the type of experts needed for the network. The miscalculation affected evolution of the network as its creators searched for its market niche, partly because of the difficulty in finding individuals with a complete set of the needed skills.

- *Continuity of facilitators, leadership, and membership over many years is key to success.* The commitment and enthusiasm of facilitators and leaders over a long period of time can support a network's continued existence and effectiveness. Likewise, members who work together over time have the opportunity to become familiar with, and develop confidence in, one another's skills and abilities. Sharing of members' expertise and experience within the network helps develop mutual trust and a perÄception of mutual benefit, both often described as key components of successful networks.

- *Network collaborators need time to become familiar with the network approach.* Network creators should recognize that it takes time for new members and partners to become familiar with the networking approach. They may need to educate users about the available opportunities and to explain features of the particular network.

- *Dissemination of best practices is more feasible in a structured institution.* Networks that do not reside at regional institutions or have weak links to such institutions tend to lack sufficient resources for disseminating best practices. They may lack the staff to research and produce best practices documents, or they may lack the conÄtacts to properly disseminate them. Though disÄsemination is a last priority, in S-to-S network collaboration, it is a central element of efficient information exchange.

- *Rosters of Southern experts should be readily accessible, linked to the network membership, and disseminated to potential users.* Many rosters of experts exist but are not widely known. To cultivate the use of Southern consultants via networks, rosters should be promoted and easily accessible. Persons interviewed reported that rosÄters also need a rating mechanism to allow users to assess the quality of expertise because lists of names alone are not enough. Therefore, networks' consultant rosters can be an important means of promoting the services of the network's memÄbers, but only if the rosters are readily accessible and include a quality assurance mechanism.

- *Donors tend to underestimate the resources needed for maintaining a network.* Although networks may seem to be easy to establish with minimal funding, the amount of resources they need is often underestimated. Longstanding networks with no main office or staff may be perÄceived as having little need for outside resources, such as TA and financial support, but this is not the reality. For example, several years ago, after the FRAC network had been in existence for 10 years and its functions were in place, ManageÄment Sciences for Health (MSH) and the Family Planning Management Development Project (FPMD) phased out direct financial support. The number of participants at yearly meetings has not decreased because they were able to find funding from other donors, including internaÄtional private voluntary organizations and minÄistries of health (MOH) (usually with donor resources). However, one key trainer interviewed explained that MSH's withdrawal of financial support has led to a decline in the quality of trainers available. To ensure continuity and quality, mechanisms should be put in place to ensure consistent funding of a network over the long term (i.e., more than an average 5-year funding cycle).

- *The transition to financial sustainability is difficult to achieve.* Few, if any, networks have made the transition to financial independence; this research did not encounter any examples of networks that have become entirely financially self-sustaining. The lack of cost analysis and cost-effectiveness data on networks has contributed to the difficulty in achieving this goal. However, through their partnership efforts, networks can leverage a variety of donor resources to sustain them until they can become self-funding.

- *A framework for monitoring and evaluating the network activities should be provided.* Because network interactions often are spontaneous, networks frequently lack a framework for monitoring and evaluation. This discrepancy makes it nearly impossible to evaluate the effectiveness of a network's activities beyond identifying the extent of participant satisfaction, the products that were shared and disseminated, and the projects that were initiated.

- *Other key components.* Successful networks include decentralized activities, coordination that promotes improving or developing the skills of the participants, flexibility, collaboration with others outside the network, and political will and motivation.

S O U T H - T O - S O U T H   C O L L A B O R A T I O N

# STUDY TOURS

*Photo courtesy of the World Health Organization.*

## Description

Study tours can allow high-level politicians, parliaÄ mentarians, and policy makers the opportunity to learn from successful programs. Such visits can provide support for national efforts to obtain resources for important activities. Study tours can be equally valuable in a working-level format where peers visit programs with similar goals to experience practical, hands-on learning about practices or tools that can improve their own programs. Participants are able to observe the setting in which the expertise or program activities take place, meet the staff, and ask questions.

Study tours are less useful, however, if adequate time is not allowed to fully examine a program; compressed time frames create the potential for visiÄ tors to form a misleading picture of what is needed for product or program replication. Also, study tours may be less useful when there is no opporÄ tunity to see an activity in action. For example, policy and advocacy efforts that result in legislative changes take time and work in subtle ways that are not always apparent, so they are not necessarily appropriate subjects for a study tour. Tools that contribute to policy change are tangible, however, and can be demonstrated.

The most often-cited weakness of study tours is the difficulty of selecting appropriate participants because participants often do not have the authority to impleÄ ment what they have learned. In other cases, high-level authorities lack the technical skills (or the politÄ ical will) to implement program components, are too busy to follow through, or simply view foreign travel as another benefit (but not responsibility) of their position.

Again, few formal evaluations have been conducted of study tours. However, people interviewed for this study reported that study tours are generally useful, and that their value is usually evident to participants and planners alike. An additional benefit of study tours is that often the host program has an opportunity to learn from the visitors as well. For example, when staff members from a program in Uganda visited the Regional Logistics Initiative (RLI) in Kenya to learn of their logistics management techniques, projects in both countries agreed to develop software to monitor transport costs, thereby benefiting both the visiting and host countries.

### Key Lessons Learned

- *Organizing study tours is almost always a heavier administrative burden than planners expect.* Study tour organizers should ensure sufficient time and staff resources for planning and coordinating the visit. This involves coordinating the activities of both participants and the host program before, during, and after the visit.

- *Making a careful selection of the study tour site helps to ensure that the tour will meet the needs of the participants.* Relevant tour sites and topics that meet participants' needs and interests, with training tailored to the needs in the visitors' own country and program, should be selected. Geographic proximity and similarities between cultures are examples of other characteristics that may be considered when choosing sites for study tours. In addition, selected sites should allow visitors the opportunity to see program operations in action. For example, in Central Asia, the former Social Marketing for Change project SOMARC (no longer in operation) conducted study tours for business people who had little experience in retail and wholesale business management to observe private-sector distribution and franchising systems in Turkey. Careful selection of promising businesses in Turkey allowed the visitors a firsthand look at modern consumer-oriented practices based on market research. Turkey was a good choice because of its proximity and the commonality of their Islamic cultural backgrounds.

- *Having a structured and well-planned set of activities before, as well as during, the study tour contributes to its success.* Those interviewed were unanimous in stating the importance of this lesson. Pre-tour preparation should include designating a contact in the host program who is responsive to tour participants' needs before, during, and after the tour. Having participants do a pre-tour review of pertinent documents, with translation provided as needed, is extremely important. Creating tour objectives and an agenda that supports a final outcome will help to ensure that the host program is in fact the most beneficial program to visit. Furthermore, having an appropriate and well-planned curriculum for the study tour will ensure that the contacts and activities will best meet the learning objectives of the participants.

- *Selecting appropriate, committed participants with a clearly understood purpose for their visit creates a solid foundation for a successful study tour.* Not surprisingly, interviewees agreed unanimously that a study tour may be ineffective if the wrong people participate. They attributed the selection of inappropriate participants to poor planning, political selection of tour members (referred to as "professional conference-goers/study tour participants"), or to some participants' greater desire for a travel experience than for a learning opportunity. Consideration should be given to choosing tour members whose purpose is to learn from their observations and to implement at least some version of what they learned within their own program. Follow-up is important to determine whether participants implemented what they learned and, if not, to find out what still may be needed for them to do so.

- *Having a complete team involved in an
exchange, rather than one person, contributes to
success in acting on new information.* Because
programs usually have more than one compoÄ
nent, study tours are more likely to result in the
implementation of new or adopted programs if
representatives from each component are includÄ
ed in the study group. Projects require managers,
trainers, accountants, logisticians, and evaluators,
among others, so staff members from all these
technical areas should observe a model project.
No institutional change will take place without a
critical mass of staff members getting new ideas
and tools.

- *To achieve their goals, study tours often require
follow-up activities.* Identifying follow-up steps
before the tour ends is a key part of planning.
Such steps may include having each participant
outline an individual action plan or producing a
joint action plan with the host program to determine the amount and type of follow-up that will
be conducted. Once the next steps are identified,
the host program and participants should mainÄ
tain professional contact for as long as needed to
support the implementation plan. This allows
participants to continue learning and provides
a source of information if additional support is
needed. Funding for follow-up activities should
be included in the initial study tour budget. As
one interviewee stated, “Do not contract only for
a defined product without funding for staff
development and capacity building.”

The Local Initiatives Program (LIP) in
Bangladesh, for example, conducted study tours
to train thana-level (i.e., sub-district-level) teams
of government administrators, family planning
professionals, and local leaders to develop and
manage their own local family planning and
maternal and child health services. Team memÄ
bers visited in-country programs that were
already well established where they had the
opportunity to ask questions and learn about
those interventions that have helped the program
succeed. During these site visits, each team develÄ
oped a one-year action plan to help organize the
community to manage the local program. These
plans were reviewed at the close of the study tour
by the local director of family planning and other
staff members, who gave immediate approval to
those plans judged acceptable. The project then
provided follow-up technical assistance and trainÄ
ing in preparing and managing budgets and
other management skills.

SOUTH-TO-SOUTH COLLABORATION

# TRAINING AND TECHNICAL ASSISTANCE

## Description

T/TA activities involve the transfer of expertise and technical skills from one setting to another setting. Like North-to-South T/TA, South-to-South T/TA can be valuable in building capacity. Recipients of S-to-S T/TA benefit not only from the training and assistance they receive, but also from their ability to build relationships with one another. Additionally, S-to-S collaborations promote self-sufficiency and program sustainability by improving the skills of the Southern trainers and consultants. A World Health Organization (WHO) employee explained this advantage by using the Chinese expression, “Learn from students to be a teacher.”

T/TA can be short-term (demonstrations, workshops) or longer-term (mentoring, internships, felÄ lowships). Specialized training also can be in-service, on the job, pre-service, or incorporated with existing professional training programs.

Distance learning, through the use of single or multiple telecommunications services, is useful for training those who are dispersed across a wide or difficult-to-access geographical area. This technology offers many options for S-to-S information exchanges without the expense of travel and related costs. Distance learning can be synchronous, where a group of trainees may learn together at one time, or asynchronous, where they can choose their own learning schedules independent of one another. Some projects prefer to use asynchronous learning approaches because they are more flexible. A group of trainees do not all need to have the same funcÄ tioning equipment, be available at precisely the same time, be at the same stage of learning, or even necessarily be computer literate; the most useÄ ful tools are those that do not require computer litÄ eracy. Computer-assisted learning tools are typically on CD-ROMs or in modules that can be downloaded from the Internet. They may be used for S-to-S distance learning and information sharing or as an enhancement tool in a classroom setting.

As with other S-to-S approaches, there is often a question of how to locate and use T/TA. Unless a project uses consultants from an organization that exists solely for the purpose of providing external T/TA, the organization providing the expertise must have the ability to deliver external T/TA and meet its own needs at the same time. However, most less-developed countries do not yet have enough resources (staff members or funds) because their own unmet needs are too great. If someone on such an organization's payroll wants to do consulting outside of the organization, the following questions must first be answered:

- Who does the person's job while he or she is gone?
- Who pays the consultant's salary, and by what mechanism?
- How does his or her institution benefit?

Another issue related to T/TA is the provider's sensiÄ tivity to and familiarity with government and NGO work. Interviewees noted that former MOH employees have an advantage when providing T/TA in a government setting because they are already familiar with governmental structures and are more likely to relate well to the MOH employees. Along the same lines, those working for NGOs and social security institutes are most helpful in similar instituÄ tions. Again, the ideal solution for organizations that aim to successfully meet the demand for T/TA may be to have experts available who have worked in each type of institution.

### Key Lessons Learned

- *Developing a pool of consultants for S-to-S training and TA takes time.* Lists of Southern consultants, whether on network rosters or only on organizations' internal lists, provide a key means of idenÄ tifying and accessing S-to-S expertise, but the consultant pool must first be developed and then be continually updated.

- *Skilled S-to-S trainers and consultants should have opportunities to serve independently instead of providing support to a Northern contracting team or always being paired with a Northern consultant.*

- *Staff recruited from developing countries often need tutoring in consulting skills.* This is one of the most important T/TA-related lessons reportÄ ed by the interviewees. Repeatedly, they said that Southern staff members who have the needed technical skills often lack consulting experience and first need to receive training in how to be a successful consultant. Managers can create disÄ crete, specific, and simple tasks for inexperienced consultants to carry out as one way to build their skills and confidence. Training is needed to allow them to break out of old hierarchical patterns, perform the necessary administrative tasks (such as writing financial and trip reports), and transfer experience from one country to another. TransÄ ferring experience is an especially important part of consulting, as experience gained in one program or country does not always translate easily into usefulness in another program or country. The most successful consultants recognize that they need to draw on a variety of approaches, adapting relevant aspects of that experience to the country's program they are assisting.

- *Lack of available Southern consultants can hinder S-to-S training and technical assistance.* Unless the Southern organization has a strategic objective to provide T/TA to other organizations, it can be difficult to hire the organization's staff as consultants. Ministry/NGO staff will sometimes volunteer their time if the ministry/NGO continues to pay their salaries, while donors often pay travel costs (airfare, local per diem, lodging). In some cases, consultants have to take leave to get paid as a consultant. In addition, if the person works in a government position, it is important to consider the political implications of using that person as a consultant. Knowing the political environment and preparing a pre-authorization letter may help in certain situations.

- *Tools that can be replicated or adapted by Southern partners are needed to facilitate the adoption of learned skills.* Too often a Northern organization creates generic tools that are then delivered to Southern programs with little local adaptation. To facilitate true adoption and sustainability of learned skills, T/TA should include tools that are locally developed or adapted. Costs may be greater initially, but the tools and training will be a true product of S-to-S collaboration, and Southern programs will be more likely to use them.

- *Managers and consultants should be aware of and address cultural biases.* Traditional animosities exist within and between certain countries (e.g., Pakistan and India), competitive attitudes exist between countries (e.g., those in Latin America), and different behaviors may be required in different countries within the same region (e.g., reserved approach in Burkina Faso versus more assertive approach in Cameroon). Ensuring that trainers and consultants have sufficiently similar cultural and organizational backgrounds can improve communications and facilitate the transfer of skills. However, there are numerous examples of unexpected linkages working successfully (e.g., interregional study tours between Asia and Africa as well as between Africa and the Caribbean), though developing such linkages may take more time, resources, facilitation, and advocacy.

- *Traditional barriers exist to having Southern female consultants taken as seriously as Southern male consultants.* Some of the S-to-S barriers to using female consultants include general sex biases, religious restrictions, and marital or familial obligations. Because female consultants are essential contributors in the health and population sectors, managers should be mindful of such barriers and make efforts to overcome them.

- *Organizations receiving T/TA are sometimes resistant to Southern assistance.* Southern organizations sometimes assume that Northern organizations have greater expertise. For example, the Program for Applied Technology in Health (PATH) worked in China to set up a contraceptive manufacturing company. PATH planned to use the expertise developed in that factory to develop other factories. However, the second factory requested the same Northern assistance as the first factory because they believed that the Northern assistance was superior.

  Another example of resistance is illustrated by CDC's Division of Reproductive Health's attempt to link a small African country's need for reproductive health survey assistance with CDC-trained survey experts from a South American country. The Africans requested that CDC verify information and gather input, doubting the South American's skills despite CDC's endorsement of their ability.

  While S-to-S collaboration is a growing trend in development, institutional and cultural barriers and attitudes still need to be overcome for broader acceptance.

- *Organizations offering specialized S-to-S T/TA need markets for their consultants, a demand for their services, and a comparative advantage over other organizations.* Southern and Northern organizations alike may perceive a project's T/TA needs differently than the project staff views its own needs. For example, the Santé Planification Familiale Projet (SPFP) found that one of its NGOs had expertise in providing T/TA in Norplant insertion and wanted to provide TA in these skills to African organizations. However, most African organizations believed they had adequate skills in this area, so the NGO found a low demand for that type of training. The NGO then decided it needed a new market niche with a comparative advantage and settled on Norplant removal, which has been well received.

- *S-to-S technical assistance should be part of a fully integrated program rather than an isolated event disconnected from other activities.* To promote more integrated programs, organizations in the same country can share joint databases or resource centers to strengthen the information available to their programs and partners and avoid unnecessary duplication of research and products. Participants in regularly scheduled training sesÄ sions can join an alumni network to promote information sharing and allow information disÄ semination via newsletter or the Internet. Fellowships and mentoring should be part of integrated programs when resources and opportunities allow.

- *When appropriate, follow-up TA should be made available after initial trainings are completed.*

# MEETINGS & CONFERENCES

## Description

In S-to-S collaborations, meetings and conferences exist for a variety of purposes, but they usually present an opportunity for staff or members of a group to network, share work experiences, renew contacts, or develop new collaborative relationships. The types of gatherings include annual staff meetings, conferences with a central theme, and regional meetings on a technical specialty area.

Meetings and conferences are useful because they remove staff members from their daily responsibilities and allow them to think more broadly about the technical aspects of their work and other related projects. When the meeting or conference is structured for sharing, participants can learn about the technical experiences of other programs. Such meetings can be an important source of innovative ideas or new perspectives and can reveal best practices that may be applied in other participants' projects. Additionally, presenters have the opportunity to share their experiences and gather feedback.

## Key Lessons Learned

- *Planners should prepare well in advance, organize all aspects of the meeting, and provide structure and guidance for follow-up activities.* A theme or topic relevant to the entire group should be selected, and structure and facilitation should be provided to keep the agenda on schedule. Activities and discussions should be appropriately matched to participants' skill levels. As with study tours, the amount of preparation required for meetings and conferences is often underestimated. For example, the PPD partners project found that its regional meetings required more time for discussion than was expected, as well as more time to develop concrete action steps. They also learned, however, that completing follow-up actions requires funding mechanisms to be in place before the meeting begins, as well as having a sufficient number of adequately trained staff for facilitating and implementing the proposed collaborations.

- *Time frames and number of participants should be limited.* Excessively long meetings can cause participants to lose interest, while excessively large gatherings lack intimacy and opportunities for meaningful exchanges. Large meetings may be good for networking and raising awareness, but they are not likely to result in the accomÄplishment of follow-up actions.

- *Participants should be selected based on their commitment to achieving the objectives of the meeting.* This lesson, applicable to all S-to-S approaches, is especially relevant to meetings and conferences and bears repeating here. Conferences can attract participants who are not appropriately committed to the goals of the meeting, but instead are taking advantage of the opportunity to escape their daily routine and travel, essentially negating the intended purpose of the gathering. Every effort should be made to invite particiÄpants who have the authority, political will, and intention to implement what they have learned when they return to their programs.

# Discussion

Those interviewed for this study reported that S-to-S collaboration has long been an important means for broadening the base of technical expertise in Southern countries and for promoting local program capacity. Interviews and document reviews alike revealed an emerging trend toward the increasing use of S-to-S collaboration for many types of projects. It is evident that donors and project designers are increasingly moving toward the use of S-to-S collabÄoration as a means of promoting self-sufficiency and contributing to program and institutional sustainability. This shift reflects the changing environment, concerns about building capacity, availability of donor funding, and issues related to program sustainability.

Clearly, S-to-S collaboration has the potential to contribute to development when the lessons learned are recognized and acted upon. The mix of approaches to use for such collaboration should be determined by the needs of persons and institutions in the counÄtry and region receiving the assistance rather than by the requirements of the funding donor. For this reaÄson, it is critical that project designs allow flexibility for Southern partners to determine which approaches to use.

Several important issues deserve consideration when deciding whether S-to-S collaboration should be an important component of a project. These issues include the following:

- Assessment of the expected strengths and weakÄnesses of S-to-S collaboration.
- Options for funding and structuring S-to-S partÄnerships to maximize benefits.
- Identifying the skills needed and locating those skills.
- Marketing approaches for promoting the use of S-to-S collaboration.

## What Are the Strengths and Weaknesses of S-to-S Collaboration?

### Strengths of S-to-S Collaboration

Employees of the United Nations, WHO, and the World Bank expressed their view that the traditional bilateral approach to development assistance is not sufficient to build local capacity, and that such assisÄtance should be more inclusive of local expertise. A representative of UNFPA stated, “South-to-South collaboration serves as the principal mechanism, within the larger framework of development collabÄoration, for the promotion of technical collaboraÄtion among developing countries.”

When S-to-S collaboration is appropriate and possiÄble, it can make an important contribution to capacÄity development. The following strengths were idenÄtified during the interviews.

- *Builds Southern technical and decision-making capabilities by:*
  - Encouraging Southern partners to identify their local and regional needs and solutions for meeting them.
  - Ensuring local “ownership” of the project and greater opportunity for institutionalizing localÄly driven initiatives.
  - Providing shared experiences that may be more culturally relevant than those between developed and developing countries.
  - Making use of expertise found in developing countries to design and evaluate effective projects.
  - Providing Southern professionals with experiÄence they can build on to improve their own existing programs.

- Many interviewees expressed the belief that because Southerners are more familiar with the cultural environment, S-to-S collaboration enables people and institutions in similar circumstances to share more effectively than if the same knowledge and skills were transferred through Northern assistance. For example, several people suggested that Northerners do not always understand the cultural environment (e.g., family life, sexual habits, political restrictions, economic realities) in which the work takes place as well as Southerners understand it. As one Southern proponent for S-to-S collaboration bluntly expressed, "...the [donor] may have been everywhere, but he may have never understood anything."

- *May provide long-term cost savings.* Travel costs may be less if S-to-S collaboration replaces some Northern assistance and if experts providing the assistance travel only locally or within regions. However, if the project includes interregional travel, uses consultants with Northern-scale salaries, or requires extensive institutional capacity building, there may be no short-term cost savings in making an S-to-S investment.

### Weaknesses of S-to-S Collaborations

Despite many statements of support (including those described above from the United Nations, WHO, the World Bank, and UNFPA), those interviewed for this study said that S-to-S collaboration may not always be the best choice. Based on the interviewees' opinions and experiences, the following are examples of circumstances that may make the incorporation of South-to-South collaboration into a project less appropriate:

- *Requirement for accountability.* Often donor-funded projects are held accountable for achieving specific outcomes within a specific time frame. Southern partners may be unfamiliar with donors' reporting requirements, and they may therefore perform tasks on a different timeline than would Northerners with more experience following donors' reporting requirements. Hence, if donors are not willing or able to embrace independent S-to-S collaborations, wherein donors lose a measure of control over the project(s), they are likely to be disappointed when results do not exactly meet their expectations.

- *Disruptions in program effectiveness.* When donors decide that establishing local programs and ensuring institutional sustainability are priorities, S-to-S collaboration can play an important role in that process. However, transferring responsibility for implementing and sustaining programs from complete Northern control to Southern collaborators also may lead to short-term decreases in program effectiveness and efficiency. Donors who make policy decisions to support and recognize this kind of transitional reality are acknowledging that sacrificing efficiency in the short-term is an acceptable trade-off for eventual independence through S-to-S collaboration. On the other hand, such a trade-off may be unacceptable to Northern donors if program effectiveness is significantly lessened over a longer time span.

- *Resource limitations.* S-to-S collaborations require funding and staff commitments from all partners, including both donors and Southern collaborators. A Southern partner organization may be "ideal" in terms of having skilled staff members who can share their expertise with others, but it may not have the financial or political support necessary to make its staff members available when and where they are needed or under the conditions required (e.g., for a long-term relationship or on short notice). An ideal partner may be located in a region other than that in which the assistance is needed, but interregional collaboration may not be cost-effective when compared with other budgeted activities. Unfortunately, funding for S-to-S collaboration often is not included in Northern planning for project design or may be inadequate for implementation or follow-up.

- *Political, cultural, and other considerations.* International political sensitivities sometimes preclude collaborative efforts which, in the absence of such constraints, might be beneficial to all those involved. In addition, a lack of trust between groups may exist based on historical, cultural, or religious biases that cannot be easily overcome.

### How Can Funding Mechanisms and Contractual Options Be Used to Structure Projects and Agreements to Better Support S-to-S Collaboration?

To be sustainable over the long term, S-to-S activities—like many non-S-to-S activities—require investments in capacity development as well as ongoing financial support. S-to-S activities have contributed to local programmatic sustainability, but ongoing financial support remains a challenge. To keep programs functioning, project designers should consider structural means of supporting sustained S-to-S activities. The following paragraphs describe potential funding mechanisms and contractual options that may be used for this purpose.

- *Supporting Southern institutions.* Identifying best practices for institutional capacity development was beyond the scope of this study, but a number of persons interviewed did suggest several mechanisms for strengthening local institutions (as opposed to individuals within an organization). One program manager noted that a simple solution for building local institutional capacity would be to require that 50% of those persons providing TA come from a local institution. This would, of course, require that the local institution have the capacity to provide high-quality TA. It would also require the donor to make politically sensitive investments outside of its own national economy. As a compromise, many donor-funded projects do make grants available to Southern organizations. For example, NGOs can apply to the Centre for Development and Population Activities (CEDPA) for small grants to provide seed monies for initial project start-up activities (e.g., a Young Men's Christian Association [YMCA] affiliate in Africa might not have the financial resources to implement new programs, so they seek seed money from CEDPA to begin project development). Usually, the organizations seeking small grants are local NGOs trying to become sources of information, services, or technical advice to local individuals and organizations.

- *Hiring local and regional staff.* Another option for enhancing S-to-S capacity is to require proposals by cooperating agencies to name local or regional Southerners rather than Northerners as the resident advisors and staff. Mechanisms and incentives for hiring local staff can take several forms. These are listed below.

  - Phasing in Southern local/regional managers within two years of a project.
  - Giving a fee allowance for high-performing contracts that require the use of local expertise.
  - Exempting use of local consultants from the "level of effort" ceiling, at least in the initial two years of a project.

### What Skills Are Needed and How Can Those Skills Be Found?

In general, interviewees reported that their challenge has been finding and accessing quality consultants rather than finding promising individuals and developing their technical skills. Even when technical training is provided, there is the additional challenge of maintaining staff members' new skills. It is therefore important to clearly define which skills are needed before identifying potential sources of this expertise. Without such research, a project may hire staff members who either have skills that are not in demand within their partner countries or lack skills that may be needed as the project develops.

When projects are being designed, planners should search for Southern local and regional institutions that can provide technical consultants as needed. Projects searching for expertise should look at local organizations' interests and capabilities as well as the demand for services among donors (their missions and contractors), ministries, and NGOs. Individuals with potential may be found in many places, includÄ ing private-sector firms, universities, and technical institutes. One source may be governmental minÄ istries that are in the process of privatizing some of their functions; as governments decentralize, downsize, and lay off staff, capable staff members with the potential, interest, and availability for consulting should be identified. After Southerners with the needed skills are located, project designers should determine whether their specialties can be broadened to include related skills that are needed for the projÄ ect. For example, with supplemental training and experience, those with management information systems expertise can apply their skills in multiple fields. However, project planners should keep in mind some obstacles they may face in hiring local staff, such as lack of political support or objections based on financial or personnel concerns.

## What Marketing Approaches Are Needed to Promote Use of S-to-S Collaboration?

Like all services, those of Southern organizations and individuals need to be marketed to enhance programmatic and financial sustainability. Projects should develop and maintain rosters of appropriate Southerners available for consultations. These SouthÄ erners should receive appropriate periodic training to maintain and improve their skills, have their names listed on accessible rosters, and be put in touch with organizations that can then contract with or hire them for consulting purposes. In other words, there is an important need to develop and sustain a market for these consultant services and to promote them widely. This should be done both by the Southern partners themselves and by their Northern donors and collaborators. Some suggestions for marketing S-to-S activities include the following:

### Southern Organizations

- *Develop strategic long-term marketing plans for Southern partners' skills.* These marketing plans should include identifying market competition, market niches, and comparative advantages, as well as developing promotional materials. MarÄ keting plans can also help organizations identify additional opportunities for S-to-S collaboration.

- *Create adaptable tools and materials that meet market demand, are appropriate for local conditions, and contribute to program improvements.* Such tools should be packaged in a manner that facilitates ease of use and attracts potential users.

- *Conduct evaluation studies* to determine cost-effectiveness and efficiency of S-to-S activities. This information can then be used to improve existing and new S-to-S activities as well as to promote the various S-to-S models.

- *Disseminate lessons learned* about S-to-S collaboÄ ration by publishing case studies and research results to raise awareness among donors and potential partners.

### Northern Organizations

- *Educate donor staff* on the value of S-to-S collabÄ oration. Although many donors and CAs have successfully hired and employed local staff memÄ bers, others need to be reminded that employing local consultants is key to capacity development.

- *Communicate to donors and CAs* about successÄ ful capacity-building efforts and future opportuÄ nities for S-to-S exchanges. For example, UNFPA/China supports many trainees' attenÄ dance at courses in Thai institutions and is encouraging China to market its institutional expertise in certain technical and medical skills.

# Recommendations for Project Designers and Implementers of S-to-S Collaboration

The following are recommendations, for both Northern and Southern project designers and implementers, based on the extensive range of expeÄriences reported by program managers, S-to-S parÄticipants, and consultants interviewed for this study.

## For Project Designers

- Create diversified funding mechanisms for S-to-S collaboration (e.g., having both Northern donors and local organizations contribute to a project promotes the recognition that they are working together toward institutional sustainability).
- Build requirements and incentives into projects for using Southern consultants and organizations led by Southern partners.
- Allocate funding for the capacity development of regional institutions.
- Build in flexibility for using a variety of S-to-S approaches that may change over time as determined by the collaborating partners and available funding.
- Provide leadership and management training for key staff members of Southern organizations so they can participate more effectively in S-to-S information sharing and project planning.
- Expand existing markets for S-to-S expertise that are not completely dependent upon donor funds.
- Incorporate a monitoring and evaluation comÄponent into projects with S-to-S components.
- Require the development and continual updating of Southern consultant rosters, and make those rosters available to a wide audience.

## For Project Implementers

- Before projects are implemented, identify local and regional institutions that are interested in and have the potential for building local and regional technical capacity.
- Strategically assess which approaches best fit program needs, giving attention to the strengths and weaknesses of each approach.
- Develop rosters of individual consultants and consultant organizations. Rosters should have a quality control component and be regularly updated and disseminated.
- Identify existing courses and workshops (e.g., from WHO, the United Nations Children's Fund, universities) that Southern experts can attend to broaden and improve their knowledge and skills.
- Evaluate S-to-S collaborations and disseminate lessons learned.
- Be proactive in identifying opportunities for S-to-S collaboration, promoting Southern expertise, and developing Southern potential.

# Conclusion

This study revealed a number of lessons that may improve S-to-S collaborations and discussed how donors and their partners can integrate these lessons into S-to-S projects. Nearly everyone interviewed enthusiastically supported S-to-S collaboration, but many expressed differing perspectives on how such collaborations should be structured and integrated within projects. A clear message emerged, however, that regardless of which approaches are used, S-to-S collaborations should include clearly identified objecÄtives; appropriate, committed participants; ongoing monitoring; and follow-up evaluation. In addition, they found that many S-to-S collaborations can beneÄfit from having longer-term relationships between partners with opportunities for follow-up activities and an appropriate level of continued funding, whether from donor organizations or other sources.

S-to-S collaboration respects cultural and linguistic similarities as well as local or regional technical capacities and, therefore, allows more effective comÄmunication to take place. Program planners should identify opportunities that are best suited to S-to-S collaboration, recognizing that it is not always the best choice. When it is appropriate and possible, S-to-S collaboration enhances self-sufficiency; without it, there is greater potential for continued dependence on Northern assistance and less potenÄtial for sharing local or regional knowledge and skills, directly exchanging lessons learned, and expanding markets for such expertise. S-to-S collabÄoration can be an essential means for widening the base of technical expertise and developing local and regional program sustainability, particularly when the lessons learned are recognized and acted upon. This review of S-to-S experiences and description of lessons learned provides a context for guiding donors, policy makers, and project designers as they take steps toward developing sustainable programs that met the needs of individual countries.

# APPENDIX A—Bibliography


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# APPENDIX B—List of Abbreviations

| | |
|---|---|
| BASICS | Basic Support for Institutionalizing Child Survival Project |
| CA | Cooperating Agency |
| CDC | Centers for Disease Control and Prevention |
| CEDPA | Centre for Development and Population Activities |
| FPMD | Family Planning Management Development Project |
| FRAC | Forum Regionale D'Analyse et de Concertation |
| HNS | REDSO/ESA Health Network Strategy |
| INCLEN | International Clinical Epidemiology Network |
| INRUD | International Network for Rational Use of Drugs |
| IPPF | International Planned Parenthood Federation |
| LIP | Local Initiatives Program |
| MIS | Management Information System |
| MOH | Ministry of Health |
| MSH | Management Sciences for Health |
| NGO | Non-Governmental Organization |
| PATH | Program for Applied Technology in Health |
| PPD | Partners in Population and Development (Partners Project) |
| PVO | Private Voluntary Organization |
| REDSO/ESA | Regional Economic Development Services Office/East Southern Africa Region |
| RLI | Regional Logistics Initiative |
| SOMARC | Social Marketing for Change project |
| SPFP | Santé Planification Familiale Projet |
| S-to-S | South-to-South |
| TA | Technical Assistance |
| T/TA | Training and Technical Assistance |
| UNFPA | United Nations Population Fund |
| UNICEF | United Nations Children's Fund |
| USAID | United States Agency for International Development |
| WHO | World Health Organization |
| YMCA | Young Men's Christian Association |