Stephen Lewis Foundation

Impact and Learning Toolkit

July 2023

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Acronyms

AA	Agency Agreement
CLO	Community-Led Organization
FR	Field Representative (Field Rep)
IAF	Impact Assessment Framework
M&E	Monitoring and Evaluation
NR	Narrative Report
SLF	Stephen Lewis Foundation

Introduction

For 20 years, the Stephen Lewis Foundation has challenged traditional power structures in international development and philanthropy by shifting resources to local communities impacted by HIV and AIDS.

Through our flexible, sustainable funding, we put long-term economic power directly into the hands of community-led organizations (CLOs). We work with CLOs in relationships built on mutual trust, support, and learning.

In responding to the HIV epidemic, these organizations are meeting individual needs, strengthening communities, and advancing social change. In the lives of adolescent girls and young women, vulnerable children, grandmothers, and LGBTIQ individuals, SLF community partners are restoring hope, reclaiming rights, fighting injustice, and saving lives.

Our impact and learning approach supports CLOs by fostering joint learning, documenting stories of change, ensuring accountability, and meeting due diligence requirements. To achieve this, we work hand in hand with our CLO partners to develop impact indicators that reflect their priorities. We have also simplified our reporting requirements and integrated storytelling as a powerful way to collect data.

Before the COVID-19 pandemic hit, we relied on regular meetings, conversations, and in-person visits to build and maintain relationships with our partners. Our Field Representatives (Field Reps) would conduct annual monitoring and evaluation (M&E) and other ad hoc visits, which strengthened our relationships and provided an opportunity for CLOs to showcase the remarkable changes they were making through their interventions.

The COVID-19 pandemic brought about significant changes in the global health and development landscape. Lockdowns, travel restrictions, and social distancing became the new norm. Despite these challenges, we recognized the resilience and adaptability of CLOs. They found innovative ways to continue serving their communities by leveraging digital and virtual platforms.

In response to the changing circumstances, we adjusted our programmatic and impact and learning approaches. We embraced virtual channels to stay connected with our partners. Through virtual impact and learning processes we can continue to build strong relationships, facilitate learning and decision-making, and ensure accountability and due diligence.

When COVID-19 restrictions started to ease, we saw the benefits of a hybrid model. Through a combination of virtual check-ins and in-person visits, our partners can reliably and consistently share the impact of their work and showcase how they restore well-being and dignity in their communities.

Our impact and learning toolkit outlines our Field Rep-supported model for project monitoring and learning and aligns with our Impact Assessment Framework (IAF). The IAF shares the structure of our approach while the toolkit provides an overview of the tools and processes applied at each step.

At the heart of it all, we believe community is key to driving impact. Our integrated impact and learning processes contribute to our IAF and ensure we meet the requirements under Canadian law to maintain charitable status. We look forward to working together with our partners and communities, documenting stories of change, and making a real difference in people's lives through our evolving approach to impact and learning.

Mandate of the Stephen Lewis Foundation

The SLF's mission is to deliver funds and other resources directly to CLOs who are leading the fight against the HIV epidemic. These organizations empower women and girls, grandmothers, orphaned and vulnerable children, LGBTIQ communities, and people living with HIV.

We advocate for global health and philanthropic communities to engage in partnering, fundraising, and international development that shifts power to community-led organizations and dismantles the inequalities that drive the HIV epidemic.

We firmly believe that the key to ending AIDS lies within communities themselves. By delivering resources directly to local organizations, the SLF ensures that support reaches those who need it most. We acknowledge the input and expertise of grassroots organizations and foster peer mentorship, networking, and co-learning opportunities.

The SLF partners with community-led organizations in 14 countries across sub-Saharan Africa: Botswana, Democratic Republic of the Congo, Ethiopia, Kenya, Lesotho, Malawi, Mozambique, Rwanda, South Africa, Swaziland, Tanzania, Uganda, Zambia, and Zimbabwe.

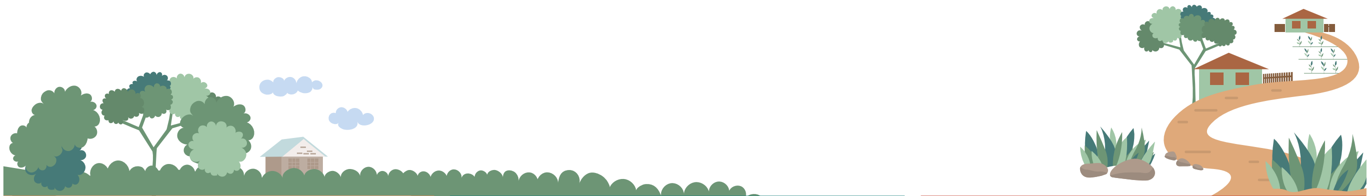
The SLF focusses on several key areas:

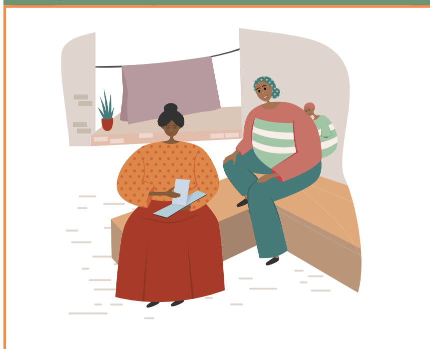
1. **Children and youth:** Supporting organizations that provide care for children orphaned by AIDS-related illnesses and offering sexual and reproductive health education and services to adolescents.
2. **Grandmothers:** Recognizing the crucial role played by African grandmothers in caring for children orphaned by AIDS-related illnesses and advocating for their rights.
3. **Home-based care:** Contributing to volunteer workers who provide essential care and support to those affected by HIV and AIDS, acting as a bridge between communities and health care providers.
4. **Positive living**: Empowering people living with HIV, particularly women, to raise awareness, provide leadership, and advocate for better access to treatment and supportive laws.
5. **Violence against women and girls:** Collaborating with organizations that address gender-based violence, providing vital care and support to those affected.
6. **LGBTIQ Africa Initiative:** Partnering with human rights defenders who support marginalized, stigmatized, and criminalized LGBTIQ communities, offering HIV testing, counselling, legal services, health care, and solidarity.

The SLF provides funding for a range of areas critical to an organization's operations and programs. We work closely with partners to ensure the funding is meaningful and adaptable to their changing needs. Funding can support administration, human resources, governance, emotional and psychological well-being of staff, operational considerations, and emergency responses.

Five Anti-Colonial Funding Principles

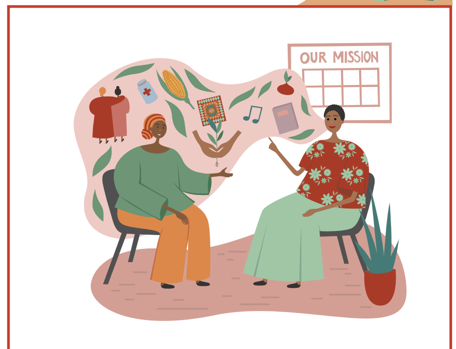
Our work integrates progressive feminist principles and is guided by our **Five Anti-Colonial Funding Principles** which are:





1. Respect the agency and expertise of CLOs by responding directly to their needs and priorities; implementing co-decision-making processes, and providing flexible, context-specific funding.

2. Provide multi-year grants as part of long-term investments in the people, infrastructure, and growth of CLOs.



3. Expand traditional approaches to demonstrating impact in community-based health initiatives and ease the burden of reporting.

4. Streamline application processes or support intermediary funders who have existing close relationships with CLOs and work in anti-colonial ways.

5. Build partnerships with CLOs that extend beyond funding to include peer learning, and advocacy.

Our Impact and Learning Processes and Tools

Impact Assessment Framework

The SLF recognizes that impact is understood not simply by the number of people reached through CLO initiatives, but through the sustainable changes that occur for people and communities as a result of this engagement.

We support holistic approaches to advancing real change in people's lives. Our CLO partners respond to the needs of the whole person and restore long-term well-being and dignity. It is for this reason that we work with CLOs as our primary partners. We know they are best placed to understand the needs of people affected by HIV and AIDS in their communities.

To better understand the effect of these changes, we have designed a series of global indicators for each level of impact outlined in our IAF. They are not imposed on partners. Instead, partners are invited to select the global indicator for each level of impact most relevant to their work.

Photo Credit: Neema Ngelime, Tanzania

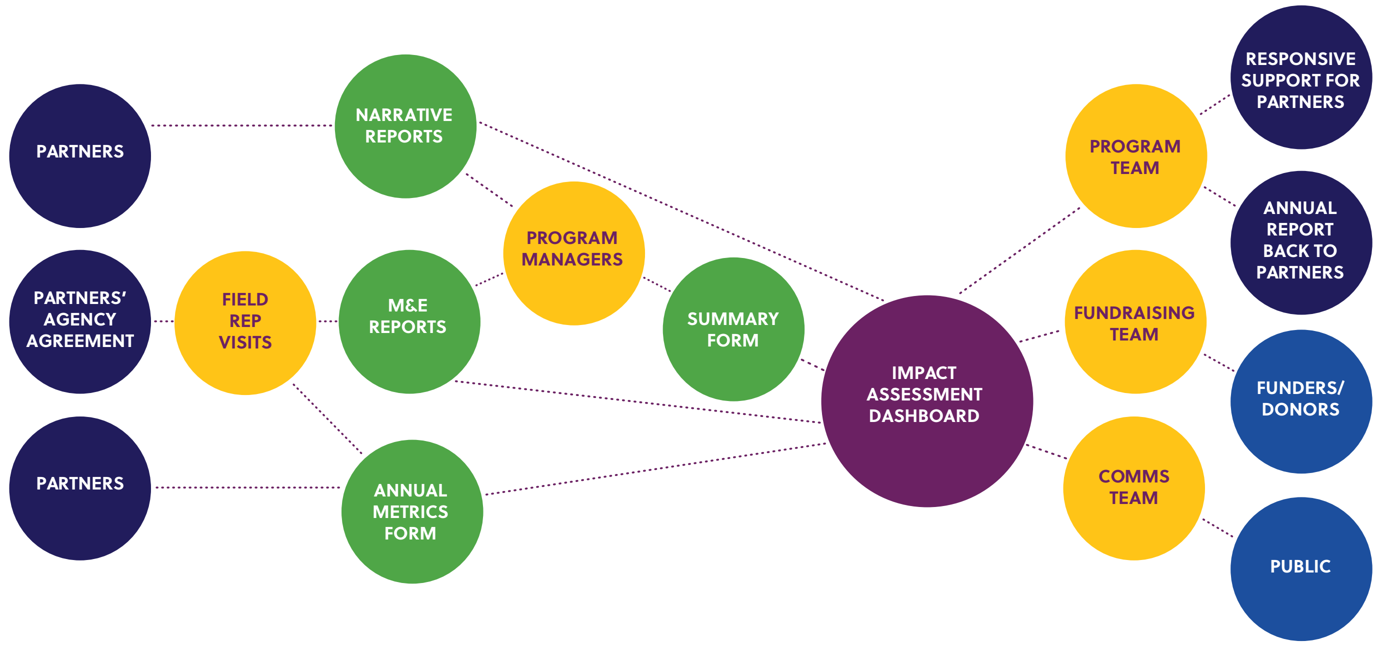
Immediate needs of individuals are met through investments in treatment, counselling, education, incomes, housing, and nutrition.

Communities are strengthened through investments in outreach and testing, local knowledge sharing, organizational capacity building, referrals, and mutual support.

Social change is achieved through movement building and investments to advance human rights, including gender equality and LGBTIQ rights, and climate change mitigation.

Our approach to impact and learning is rooted in collaboration and understanding the experiences of our CLO partners. We co-create our monitoring and evaluation (M&E) process and indicators, ensuring they align with our partners' needs and priorities. We don't allow measurement to overshadow effective program delivery. We believe that a better understanding of the work will lead to increased engagement in their remarkable efforts. We go beyond numbers and metrics to capture their holistic impact. Through active listening and understanding, we gain insight into what drives positive change.

Impact and Learning Information Process Flow



We have developed a robust system for gathering information and ensuring our information process flow and impact and learning tools are integrated and aligned. Through an appreciation for diverse ways of acquiring and sharing knowledge, we carefully craft clear and concise data collection tools. These tools allow for open reflection and information sharing, which enhance our understanding of the impact that each CLO is making in their communities.

We recognize the importance of contextual factors and provide opportunities to reflect on changes and factors affecting progress. Our tools emphasize storytelling, which is effective in conveying the experiences and impact of our CLO partners and their communities. These stories contribute to our ability to communicate impact effectively.

We gather data using five powerful tools: the **Semi-Annual Progress Report**, **Annual Narrative Report**, and **Annual Impact Survey** submitted by partners in accordance with their respective Agency Agreements, and the **Annual Field Representative Survey** and **M&E Visit Reports** completed by SLF Field Reps.

Each tool assesses impact in different ways, informs learning, and helps us to understand partner relationships and community impact.

Agency Agreement (AA)

We refer to the contracts that outline funded activities and details of our support for CLO partner organizations as Agency Agreements. These agreements are based on project proposals submitted by CLO partners. We emphasize flexibility in our funding approach and don't prescribe proposal templates. We incorporate a CLO's vision and language into the final agreement.

Each Agency Agreement contains comprehensive information about the organization's history, approach, the needs of their clients, and the desired impact within the specified timeframe. These agreements serve as a roadmap for achieving the intended impact. They encompass elements including monitoring and evaluation, implementation plans, and budgets. In line with our commitment to long-term funding, most of our Agency Agreements are multi-year agreements, typically lasting 2–3 years, with the option for renewal based on various factors.

Narrative Reports (NRs)

Our CLO partners submit Semi-Annual Progress Reports and Annual Narrative Reports, Annual Impact Surveys, and financial reports as part of their Agency Agreements. The reports provide valuable insights into our partners' work, progress, and the specific impact they are making. Partners also provide an Activity Progress Report, highlighting their achievements and milestones based on agreed-upon activities. The narrative description section allows partners to explain their approach in detail, and in their own words, and demonstrate how it aligns with the indicators and activities outlined in the Agency Agreements.

To add depth and personalization, partners can include stories in the reports, which can be accompanied by photos of clients if consent is confirmed. We request an update on people whose stories were previously shared, creating a connection between reporting periods and tracking progress over time.

Open-ended prompts provide partners with the opportunity to offer further context and insights into their work. They can describe how their approach has responded to the specific needs of their clients and showcase innovative or tailored strategies.

The reports also address challenges encountered by partners and how they successfully overcame them. This section allows partners to highlight their problem-solving skills and resilience.

Finally, partners identify the most significant impact they have observed, allowing for reflection on their work and the outcomes that stand out the most.

The Narrative Reports serve as an informative tool to enhance learning about our CLO partners' progress and implementation of the funded project. The Narrative Reports are are easy to submit digitally, using Google Forms, with responses automatically populating a Google Sheets database. This process ensures streamlined data collection and organization.

Photo Credit: Neema Ngelime, Tanzania

SLF Field Representatives

Who is a Field Rep?

Our Field Reps are committed and experienced individuals who provide a link between the SLF and our partners. Field Reps are seasoned independent professionals with years of expertise in various fields, such as community development, social work, public health, human rights, HIV and AIDS activism, and education.

Field Reps embody the core values of our organization. They strive to build relationships based on respect, trust, honesty, and solidarity with our partners and the communities they serve. Our Field Reps are self-aware and sensitive to issues related to gender, race, sexual orientation, and disability, ensuring inclusivity and awareness of power dynamics in their role. Field Reps provide expression to our principles of feminism, social justice, and our anti-colonial funding principles.

Our Field Reps are not just observers; they share information, relay feedback, and recommendations from CLOs to our SLF team in Canada, ensuring that our programs are responsive to the needs and realities of their communities. The recommendations and analysis provided by our Field Reps assist us in supporting the ongoing growth and development of our partners. While Field Reps don't make funding decisions, their insights strengthen the relationships between the SLF and our partners, enabling us to make a greater impact together.

Photo Credit: Neema Ngelime, Tanzania

SLF Field Representative Visits

Field Rep visits are a crucial component of our impact and learning and M&E approach. During these visits, Field Reps personally engage with our partner organizations through virtual or hybrid visits, which combine online and in-person visits. Field Reps observe and assess the implementation of activities, evaluate progress toward set goals, and collect qualitative and quantitative data.

Field Rep visits allow us to gather firsthand information about the challenges and successes experienced by our partner organizations. They provide an opportunity to understand the contextual factors that may influence program outcomes and make informed decisions on how to address any issues that arise.

Through these visits, we strengthen our relationship with our partners, provide capacity assistance and guidance, and offer support tailored to their specific needs. Field Reps act as a bridge between the partner organizations and our SLF team in Canada, facilitating communication and information sharing.

Types of Field Rep visits

Field Rep visits are categorized into four areas:

1. Preliminary visits: These visits assess CLOs for new partnerships. The primary objective is to gather information for decision-making regarding potential funding of new projects. Field Reps focus on understanding the organization's history, past achievements, challenges, and structure. Financial management is a main focus during these visits, which are in person or hybrid.

2. Monitoring and evaluation (M&E) visits: These visits are normally conducted annually for ongoing monitoring and evaluation. They can be virtual or hybrid. Most Field Rep visits fall into this category as they are part of our regular monitoring and evaluation processes.

3. Targeted visits: Targeted visits are conducted in response to specific situations such as capacity-building needs, external donor requirements, or the documentation of promising practices. These visits are tailored to address specific needs or objectives identified by the partner organization or the SLF. They are typically in-person or hybrid visits.

4. Investigative visits: Investigative visits are conducted in urgent, crisis, or priority situations. The Field Rep's role in these visits is to gather information and provide it to the SLF to inform our response. The Field Rep does not directly intervene but plays a crucial role in assessing and reporting on the situation. These visits are typically in-person or hybrid.

Field Rep visits — virtual and hybrid

In response to the COVID-19 pandemic, our Field Rep visits underwent a significant transformation. We quickly shifted from in-person to virtual visits, using technology to maintain support for and connection with our partner organizations, and meet our impact and learning, and M&E requirements.

As travel restrictions ease, we are introducing an innovative blend of virtual and in-person interactions. This hybrid approach enables us to maintain the flexibility and efficiency of virtual visits while also facilitating crucial face-to-face engagements when appropriate.

Typically, Field Rep M&E visits occur on an annual basis, but the frequency may vary depending on the organization and the need for more in-depth conversations. Preliminary visits are one-time pre-assessment visits, while targeted and investigative visits are conducted when needed.

While planning and preparation is similar, each type of visit serves a distinct purpose and contributes to the SLF's overall understanding, support, and response to our partner organizations. Each visit is tailored to flexibly address the issues and needs of the partner as well as the context.

Virtual Field Rep visits

Virtual visits take priority in the following situations:

1. Strong partnerships: When we have built enduring relationships with our partner organizations, virtual visits offer an efficient and convenient way to stay connected, maintain relationships, and monitor progress. These visits serve as routine check-ins when there are no major concerns. Many of our M&E visits fall into this category.

2. Widening participation: Virtual visits allow us to engage with interviewees from a broader geographic area. By embracing technology, we are able to transcend geographic boundaries for partners who work in multiple locations and ensure that more individuals can actively participate, share their insights, and contribute to the monitoring and evaluation process.

3. Safety and confidentiality: For sensitive matters, virtual visits provide a safe and confidential space. Virtual visits enable individuals, particularly those from marginalized communities, conflict zones, or countries operating under restrictive legal frameworks, to engage in discussions with anonymity and confidentiality.

Virtual Field Rep visits are cost-effective and allow for flexible scheduling. Virtual visits involve a series of calls usually over two days using platforms like Zoom, Teams, Google Meets, WhatsApp, or phone calls, depending on the connectivity preferences of the CLO. We make a small financial contribution to support any additional costs — data, airtime, transport for participants to meet at a central location — associated with the virtual visit.

While technology integration has been successful for most of our partners post-COVID-19 pandemic, challenges such as electricity outages, network coverage limitations, or equipment availability can impact the effectiveness of virtual visits. Nonetheless, we remain committed to finding solutions with our partners.

Hybrid visits (in-person and virtual)

Hybrid and in-person visits are prioritized in the following situations:

1. Preliminary, targeted, and investigative visits with new partners or to address urgent concerns.

2. Major changes: Significant changes, such as funding shifts or leadership transitions. Evaluation of new programs or projects, and when considering implementing new programs or projects, for deeper understanding of the CLO's capacity and context.

3. Work in volatile or isolated areas and with marginalized communities, in challenging environments to demonstrate solidarity with the partner and build stronger relationships, strengthen capacity, and to allow for meaningful community interaction.

4. To strengthen relationships and understand impact by building bonds between the SLF and partners. In-person meetings can enable better understanding of the organization's impact and create a more collaborative environment.

5. For meaningful engagement with clients and community members, to build trust, gather firsthand observations, and promote a deeper understanding of the community's needs and aspirations.

Hybrid visits are a combination of virtual and in-person meetings. The in-person component is informed by issues or needs affecting the organization. Ideally, in-person interactions prioritize meetings with key staff, clients, stakeholders, and community members. Virtual meetings are best for routine and administrative aspects of the work as well as meetings with people who live in harder to access geographic locations. This approach ensures balance between the benefits of virtual meetings and direct, face-to-face engagement.

Planning a Field Rep visit

Setting up	Preparation	The Assessment	Report and wrapping up
1. Confirm dates with SLF and FR **2.** SLF contacts project partners **3.** SLF send documents to FR (including agency agreement, narrative report and previous M&E report if available) **4.** FR emails partners to set up dates **5.** FR calls project partners to support planning for the visit	**6.** FR to email detailed guidance to partner to plan the visit including the M&E checklist (see appendix) and list of documents required **7.** Partners send relevant documents in advance of the visit **8.** SLF Program Manager prepares and sends briefing notes to FR **9.** FR shares Organizational Self-Assessment Tool with partner when relevant	**10.** FR shares interview schedule/itinerary with SLF **11.** FR conducts online interviews/in-person meetings **12.** FR schedules feedback call, if needed **13.** Thank you email to partners	**14.** SLF to send survey of M&E experience to partner organization **15.** FR compiles report **16.** FR sends expense reconciliation **17.** FR to invoice **18.** SLF to pay upon submission of above

Once the SLF has determined whether the visit will be virtual or hybrid, planning begins. (See Appendix A: Guidelines for a virtual Field Rep visit and Appendix B: Guidelines for a hybrid Field Rep visit).

Planning a Field Rep visit involves close coordination between the Field Rep and the SLF Deputy Director of Impact and Learning:

1. Determine availability: We start by checking the Field Rep's availability to find suitable dates for the visit

2. Confirm visit dates: 2–3 weeks prior to the visit, the SLF Deputy Director of Impact and Learning reaches out to the partner organization to propose the visit and finalize dates. (See Appendix C: SLF email to project partners for a virtual visit and Appendix D: SLF email to project partners for a hybrid visit.)

3. Confirm visit and plan schedule: The Field Rep follows up with the partner organization to confirm the dates for the visit and plan the schedule and itinerary (See Appendix E: Field Rep email to project partners for a virtual visit; Appendix F: Field Rep email to project partners for a hybrid visit; Appendix G: Planning checklist for a virtual Field Rep visit; and, Appendix H: Planning checklist for a hybrid Field Rep visit.)

Planning a hybrid visit:

- Arrange virtual meetings: The Field Rep manages the virtual component of the visit which usually occurs before the in-person visit. This includes sharing links to Zoom or Microsoft Teams and contact information for phone or WhatsApp calls, ensuring smooth and effective communication. Topics likely to be covered in the virtual component include the organizational overview, aspects of financial management, and governance. Topics vary depending on the issues and needs of the organization.

- Arrange in-person meetings: The Field Rep coordinates the in-person component of the visit in collaboration with the partner organization. Topics likely to be prioritized for the in-person component include the project overview, the financial management system, and meetings with clients, stakeholders, and community members. This will vary depending on the issues and needs of the organization.

- Arrange travel: The Field Rep arranges travel plans for in-person visits. They rely on insights from previous Field Rep reports in the "Travel Tips" section of the reports, which include recommendations for drivers.

- Accommodation: Field Reps ensure they stay in reasonably priced, comfortable, and safe accommodations. To maintain professionalism, they do not stay at the homes of partner organization staff.

- Trip advance and expense reimbursement: Prior to departure, the SLF provides an advance to the Field Rep's bank account, covering basic travel expenses, including flights, visas, ground transportation, and hotels. Instead of a per diem, the Field Rep submits other expenses with supporting documents for reconciliation following the visit.

Planning a virtual visit:

The Field Rep takes care of all necessary arrangements for virtual visits. This includes sharing links to Zoom and Microsoft Teams meetings and contact information for phone or WhatsApp calls, ensuring smooth and effective communication.

Scheduling time with project partners

Field Rep visits typically take place over two days. For hybrid visits, one day is reserved for in-person meetings and a half day is reserved for virtual meetings. This is a proposed schedule for routine visits, including M&E and preliminary visits. Each visit is unique, and depending on the partner and the context, the order of meetings can vary:

1. Organization overview: The Field Rep meets with the Executive Director and other staff members either online or in-person. This session, lasting approximately 1–1 ½ hours, provides an opportunity for an organizational overview, contextual information, history of the organization, and an update on how and what the organization is doing.

2. Project overview and management: We discuss details of proposed or funded projects, including management and administration. We review the proposal and Agency Agreement, Narrative Reports, and monitoring and evaluation tools. This meeting, with the Executive Director or relevant staff members, usually takes around 1–2 hours.

3. Financial management: To understand the organization's financial management practices we meet with the finance manager or relevant finance team members to review financial documentation. This session lasts about 1–1 ½ hours.

4. Governance structures: To gain insights into the organization's governance, we meet with board members or steering committee members. Additionally, we review board minutes to understand decision-making processes and overall governance structures. This session generally takes 30 minutes to 1 hour.

5. Project impact: A crucial aspect of the M&E visit is evaluating the impact of the organization's projects. We meet with community members, clients, and other stakeholders. Depending on the location, we may also conduct site visits and interact with clients in person. This part of the visit can take from 2–4 hours, depending on the number of sites to be visited and distance between them.

By comprehensively covering these areas, we aim to gain a holistic understanding of the organization, the context, their projects, and their impact.

For targeted and investigative visits, the SLF provides guidance, supporting documents, and specific input which determine how the visit is scheduled.

Preparing for a Field Rep visit

Supporting documentation

Field Reps share a checklist that supports partners to plan the itinerary and schedule and prepare documents that are required in advance of the visit (See Appendix G: Planning checklist for a virtual Field Rep visit and Appendix H: Planning checklist for a hybrid Field Rep visit.)

Briefing notes

Field Reps receive briefing notes prior to their visits compiled by the SLF Program Manager. These notes provide a concise summary of the Agency Agreement and include the Program Manager's assessment of the organization as well as important and specific questions to guide the Field Reps during their information gathering process. The questions may be related to confidential concerns.

Field Reps are provided with additional documents, such as the Agency Agreement or project proposal, Narrative Reports, financial reports, and previous Field Rep reports before their visits. These documents offer further insights and background information to support the Field Reps in their interactions with the partner organization.

Organizational Self-Assessment Tool

The **Organizational Self-Assessment Tool** is designed to help partner organizations reflect on and assess their internal processes. It serves as a guide for organizations to review their systems and approaches and identify changes they may want to make. The tool encourages organizations to recognize their strengths and what's working well, while also identifying opportunities for growth and improvement in areas including governance, financial management, community engagement, project management, and monitoring and evaluation.

It's important to note that the tool is not prescriptive. Instead, it is meant to support reflection and learning within organizations. It helps organizations to assess their needs, goals, and priorities. We understand that every organization has its own journey, and we respect the diverse contexts in which they operate.

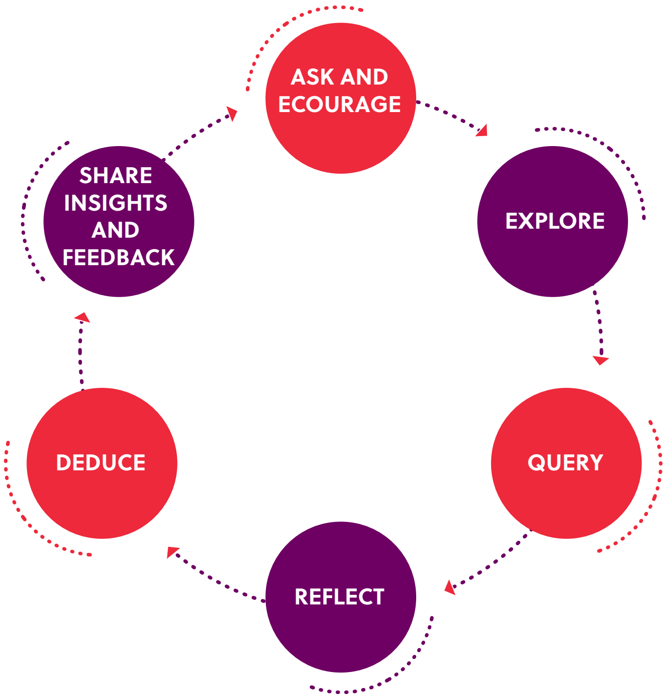
The tool can be helpful in preparing for visits from Field Reps. By reviewing the assessment process, organizations can gain a better understanding of the areas that will be covered during Field Rep visits and be better prepared.

Overall, our Organizational Self-Assessment Tool is a user-friendly resource that serves as a guide for organizations to evaluate and enhance their internal processes, ultimately contributing to their overall success and impact.

By following these steps, we ensure well-planned and organized Field Rep visits, whether they are conducted in-person, hybrid or virtually.

Conducting a Field Rep visit

During the visits, our Field Reps conduct a series of meetings with relevant individuals, either online or in-person, as outlined in the itinerary and schedule. While the proposed schedule is usually followed, we maintain flexibility to accommodate necessary adjustments. During these visits, Field Reps interact with the staff, volunteers, and clients, gaining firsthand insights into their activities, challenges, and successes. They observe program activities, assess the quality of services provided, and gather important data through interviews, and other methods. Field Reps may also provide guidance and support to partner organizations, helping them improve program effectiveness.



Our approach emphasizes impact measurement from the perspective of the CLO. Field Reps adopt an open and conversational style during visits. They create a professional and warm atmosphere that builds respect, engagement, trust, and openness to diverse perspectives. Inclusivity and participation of all attendees are encouraged whenever possible. If translation is required, the organization provides a translator, often a staff member.

Photo Credit: Neema Ngelime, Tanzania

Field Reps also focus on understanding the evolving context, actual changes that have occurred (both intended and unintended), innovations, and how the organization's intervention has contributed to those changes. The Field Rep visit prioritizes meaningful engagement, enabling honest discussions that encompass both successes and challenges faced by the organization.

Recognizing the holistic nature of our partners' efforts, we value narrative content, such as case studies, storytelling, drawings, or songs as effective means of understanding their impact. When appropriate, our Field Reps delve into the personal stories of individuals involved, including staff, clients, and other interviewees. These stories may explore experiences like caring for orphaned children or coping with the effects of HIV and AIDS, as well as hopes for the future. Such stories are of great interest to us, as they help us connect with the motivations, experiences, and wisdom of the people behind the organization.

The process is guided by collective, collaborative, and non-judgmental reflection. Our Field Reps understand that how questions are asked is just as important as the questions themselves. They emphasize that the visits are mutual learning opportunities.

During both in-person and virtual meetings, our Field Reps take notes. With permission, they may also record virtual or in-person meetings. However, it is important to note that recording meetings can impact participants' responses, especially when sensitive or confidential topics are being discussed.

Visual storytelling

Photographs are a way to visually capture the essence of a project and provide project staff at the head office with a sense of the people involved. They also serve as a powerful tool for our communications staff to share stories of change.

During in-person visits, our Field Reps always seek permission before taking any photographs. Respecting the privacy and preferences of individuals and communities is of utmost importance to us. If consent is granted, these photographs may be used on our websites, newsletters, and other outreach materials. The consent process is under continuous review, as contexts change over time.

Feedback to partner organizations

We recognize the importance of feedback and dedicate time at the end of each visit to share some with our partner organizations. Our Field Reps highlight positive aspects they have experienced and observed during the visit, acknowledging the strengths and successes of the organization. We believe the visits are an opportunity for partners to be seen, heard, and celebrated, as they share a comprehensive picture of their work.

In addition, Field Reps share best practices, strategies, models, and approaches from other partners. If relevant, Field Reps offer recommendations or identify areas that could benefit from strengthening or improvement.

While our Field Reps can make recommendations, it's important to note that they are not decision-makers. The final decisions and any additional recommendations or guidance will be provided by the SLF Program team. Following the Field Rep visit, ongoing correspondence with the partner organization will be continued by the Program Team.

Debriefing

There are times when Field Rep visits can be difficult or challenging for various reasons. If necessary, we schedule a debriefing call between the Field Rep and the SLF to provide an opportunity for reflection and discussion. The debriefing call allows the Field Rep to share their experiences, challenges, and any concerns they have or issues they encountered during the visit.

Photo Credit: Neema Ngelime, Tanzania

Field Rep Reports

After conducting virtual or hybrid visits, our dedicated Field Reps compile comprehensive reports. Our M&E Visit Report is a user-friendly Google Forms template. This standardized report ensures information is captured systematically and can be easily compared across the organizations we support. The form is designed to align with our Impact Assessment Framework, allowing us to assess the effectiveness of the initiatives.

The M&E Visit Report form includes open-ended questions that allow Field Reps to report in their own style to capture the necessary level of detail for narrative-based data collection. The template facilitates consistent and structured data collection while providing a platform for Field Reps to share their unique perspectives and narratives. This format serves as an organizing framework for sharing important findings, stories, and analysis from each visit.

Field Reps provide detailed justifications for their recommendations. These justifications are then compared against other sources of information that the SLF has about the partner organization. For preliminary visits, Field Reps will provide analysis to guide the SLF on whether the project is a good fit with the SLF's mission and values as well as its organizational capacity.

Our Field Rep Visit Reports capture important details, including:

- Information on governance, management, and financial systems, highlighting their strengths and areas for growth
- Observations and progress made on the agreed activities for an M&E visit
- Observations and the potential of the proposed activities in the case of a preliminary visit
- Descriptions of the local context, such as the location, team dynamics, and feedback from clients and stakeholders

- Impressions of the organization's approach and its impact on individual and community needs, as well as social change
- Analysis of strengths, challenges, learnings, and innovative insights gained during the visit, including personal perspectives from the Field Rep
- Recommendations and feedback given to the organization based on the findings
- Travel tips for future in-person visits, including hotel contacts, transportation options, and weather considerations

Field Rep Visit Reports are confidential and are not shared outside of the SLF. They are submitted 2–3 weeks after the visit, along with an expense report detailing all travel costs and an invoice from the Field Rep once all reports are submitted.

These reports make a significant contribution to the range of data sources that the SLF uses to inform decision-making and improve support for partner organizations.

The Enriching Contribution of Field Rep Visits

Field Rep visits are exceptionally valuable to the work of the SLF. These visits contribute to building and strengthening meaningful relationships over time. Our dedicated Field Reps, who have been working with the SLF for an extended period, play a crucial role in documenting these visits through detailed reports which capture the history of our partners' work and the evolving community responses to HIV.

Our staff members highly appreciate Field Rep reports as they serve as a holistic check-in on the well-being of our partners and the communities we aim to support. Through these reports, we can stay connected, stay informed, and continue to strengthen the relationships we have built. The information supports our Programs, Fundraising, and Communications teams.

Our partners have shared with us how beneficial they find the Field Rep visits for their organizations and their communities. These visits serve as an enriching opportunity for learning and relationship building. They create a safe space to share successes and challenges that might be difficult to communicate through other means or platforms.

Field Rep visits open doors to identify capacity-building and networking opportunities. They foster a culture of reflection and celebration, where we can acknowledge and honour the remarkable achievements of our partners.

Annual Field Rep Survey

The Annual Field Rep Survey is a tool that collects information and reflections from Field Reps about their visits to partners in the previous year. The survey captures insights on emerging themes, enabling us to stay up to date with the changing landscape of our partner's work. Field Reps also have the chance to share what they found most interesting or inspiring during their visits, highlighting the impressive work being done. This survey aids in improving our support to partners and ensuring our work aligns with their evolving needs. The survey is submitted digitally using a Google Form template, with responses automatically populating a Google Sheets database.

Impact Assessment Dashboard

The Impact Assessment Dashboard makes information easily accessible and relevant to our teams. Program Managers review reports and save them in a shared drive, while providing concise summaries using Google Forms. These summaries populate a shared Google Sheets database for all staff members to view. The dashboard ensures everyone has the information they need to support their work and make informed decisions.

Annual Impact Report

We believe in the power of knowledge and the responsibility to share it. That's why we have developed a structured process to gather information and learnings from our work to share with our partners and stakeholders.

One channel is the Annual Collective Impact Report, which we create in collaboration with our partners. This report highlights important trends, challenges, and best practices that we have observed throughout the year.

To create the report, we gather data and insights from numerous sources. We collect information from our partners through an Annual Metrics Form, which they fill out and submit online. We use digital tools like Google Forms to streamline the data collection process, making it easier for our partners to provide us with the information we need. This allows us to compile and analyze the data efficiently and create a comprehensive report.

By collecting and synthesizing this information, we gain a deeper understanding of the relationships between our partners and the impact they are creating. This knowledge helps us improve our programs and better support our partners in their important work.

Conclusion

In their work in communities, our partner organizations realize the transformative power of human connection. CLOs understand the importance of tuning in to the unique needs of the individuals and communities they serve. They go beyond providing support by connecting people to vital services and networks that can make a real difference in their lives.

CLOs operate in challenging environments, where they build relationships based on trust, empathy, and understanding. They listen attentively and respond with care to the complex and sensitive issues faced by their communities. By nurturing these deep connections, our partners create lasting change and empower people who are living with or affected by HIV and AIDS.

At the SLF, we are inspired by the impressive work of our CLO partners. Their dedication and compassion shape our impact and learning approach. We learn from their practices and incorporate their wisdom into our strategies. As a principled and values-guided organization, we will continue the learning and unlearning that is necessary as we work in solidarity with CLOs responding to the HIV epidemic in countries across sub-Saharan Africa.

Appendix A: Guidelines for a virtual Field Rep visit

Step	Process	Who	When	Supporting documents and correspondence
1.	Determine possible dates for virtual interviews and in-person visits	SLF and FR	3 weeks prior to interviews	Email
2.	Reach out to partners via email to explain the online M&E process, introduce the FR, and share optional dates for FR meeting	SLF	3 weeks prior	Email
3.	Send relevant project background documents to the FR for review	SLF	3 weeks prior	AA, and NR, financial, and FR reports
4.	Follow up with partners to explain the process, request documents, and establish a time frame. Online meetings can be scheduled over a few days.	FR	3 weeks prior	Include: Attach letter to projects (See Appendix C) and online M&E checklist
5.	Schedule a call with the person organizing the virtual visit to answer any questions about the process, if needed	FR	2–3 weeks prior	
6.	FR to receive completed online M&E checklist from project partners	SLF Partner	2 weeks prior	M&E checklist received
7.	Submit relevant documents as outlined on the M&E checklist	SLF Partner	1 week prior	See M&E checklist for document list
8.	Briefing notes sent to FR	SLF	1 week prior	Briefing notes
9.	Share interview schedule with SLF	FR	1 week prior	Completed M&E checklist
10.	Conduct online interviews/meetings via WhatsApp, Zoom, Teams	FR	As scheduled	Online M&E template
11.	Schedule follow up, feedback, and thank you calls with organization leader(s)	FR	TBC	
12.	Send Thank you emails to partners	FR	Within 1 week of interviews completed	
13.	Send a survey about the online M&E experience	SLF	1 week after process completed	
14.	Compile report	FR	Varies depending on # of projects visited	Project documents and interview notes
15.	Reconcile expenses, including any costs related to telephone, Zoom or internet	FR		Expense reconciliation
16.	Invoice SLF using SLF template	FR		Invoice
17.	Send payment upon receipt of reports	SLF		Reports, expense reconciliation, and invoice

Appendix B: Guidelines for a Hybrid Field Rep visit

Step	Process	Who	When	Supporting documents and correspondence
1.	Determine possible dates for virtual interviews and in-person visits	SLF and FR	4 weeks prior to interviews	Email
2.	Contact partners via email to explain the hybrid M&E process, introduce the FR, and share optional dates for FR meeting	SLF	3–4 weeks prior	Email
3.	Send relevant background documents to the FR for review	SLF	3 weeks prior	AA, and NR, financial, and FR reports
4.	Follow up with partners to explain the process, request documents, establish a time frame and which meetings will be virtual or in-person based on the purpose of each meeting. Online meetings can be scheduled over a few days. A date for in-person meetings to be finalized.	FR	3 weeks prior	Letter to projects (See Appendix C) Attach SLF hybrid M&E checklist
5.	Book travel and accommodation using the travel advance from the SLF, and apply for travel visas if needed	FR	2–3 weeks	
6.	Schedule a call with the partner contact planning the hybrid visit to answer any questions	FR	2–3 weeks prior	
7.	Send FR completed M&E checklist and confirmed schedule	SLF Partner	2–3 weeks prior	M&E checklist received
8.	Submit documents outlined on the M&E checklist	SLF Partner	1 week prior	See M&E checklist for document list
9.	Send briefing notes sent to FR	SLF	1 week prior	Briefing notes
10.	Share final interview itinerary with SLF	FR	1 week prior	Completed M&E checklist
11.	Conduct online interviews/meetings via WhatsApp, Zoom, Teams, and in-person	FR	As scheduled	M&E template
12.	Schedule follow up, feedback, and thank you calls with organization leader(s)	FR	TBC	
13.	Send Thank you emails to partners	FR	Within 1 week of interviews completed	
14.	Send survey about the online M&E experience	FR	1 week after process completed	
15.	Compile report	FR	Varies depending on # of projects visited	Project documents, interview notes
16.	Reconcile expenses, including any costs related to telephone, Zoom or internet, and travel	FR		Expense reconciliation
17.	Invoice the SLF using SLF template	FR		Invoice
18.	Send payment upon receipt of reports	SLF		Reports, expense reconciliation, and invoice

Appendix C: SLF email to project partners for a virtual visit

(Adapt as needed)

Dear **[CLO partner]**,

Warm greetings from the Stephen Lewis Foundation — we hope you and the [CLO partner] team are all well.

Due to COVID-19, it has been some time since the SLF has visited **[CLO partner]** for M&E purposes. As we transition back into travelling for in-person visits, we are also continuing with our M&E engagement in a virtual capacity. The virtual process mirrors our in-country visits, and the purpose remains the same: to learn firsthand about the implementation of your work and to discuss elements of your project that can be difficult to capture in reports or routine emails and phone calls.

We deeply value the opportunity to gain a better understanding of your work, your organization, and the communities you serve.

Just like in-person visits, we will review and discuss the progress of the projects, and any successes, challenges, and learning. We will also be using some additional online tools to:

- Virtually engage with various staff members, including volunteers and board members
- Schedule time to learn more about your organization's systems, including financial and administrative documentation methods, processes, and procedures
- Review financial, administrative, and project data collection documents (including the tools that you use to submit Narrative Reports) to support this learning process

This virtual visit process will include a few meetings on dates to be determined (TBD) by you and the SLF Field Representative, with some preparatory work involved. Proposed dates include **[insert proposed date range].**

Please let me know if this timing presents any issues. **[Name of Field Rep]**, the Field Representative who is leading this M&E process with you, will be in touch in the coming days to provide more details and next steps, and work with you to schedule specific days and times for the virtual meetings.

To cover costs to your organization incurred by this virtual visit, related to translation, airtime fees, data charges, or transportation, the SLF will be adding a CAD [amount] transfer to your next Agency Agreement (AA) instalment. You are not required to report on this stipend and can use it as needed.

We know this will take time from your already busy schedules, and we appreciate your flexibility and willingness to accommodate the M&E process.

If you have any questions or concerns, please contact me, and I will be happy to help.

With warm regards,

[Insert signature]

Appendix D: SLF email to project partners for a hybrid (in-person and online) visit

(Adapt as needed)

Dear **[CLO partner]**,

Warm greetings from the Stephen Lewis Foundation — we hope you and the **[CLO partner]** team are all well.

Due to COVID-19, it has been some time since the SLF has visited **[CLO partner]** for M&E purposes. We are pleased to let you know that we will be gradually resuming in-person visits, combined with some engagement in a virtual capacity. A hybrid in-person and virtual approach will allow us to optimize the time we have together.

The purpose of our hybrid visits remains the same: to learn firsthand about the implementation of your work and to discuss elements of your project that can be difficult to capture in reports and routine emails or phone calls.

We deeply value the chance to gain a better understanding of your work, your organization, and the communities you serve.

Together, we will review and discuss the progress of the projects, and any successes, challenges, and learning. Through our in-person and virtual tools we can:

- Engage with various staff members, including volunteers and board members
- Schedule time to learn more about your organization's systems, including financial and administrative documentation methods, processes, and procedures
- Review financial, administrative, and project data collection documents (including the tools that you use to submit the Narrative Reports) to support this learning process

This process will include a few meetings on dates to be determined between you and the SLF Field Representative, with some preparatory work involved. Proposed dates include **[insert proposed dates].**

Please let me know if this timing presents any issues. **[Name of Field Rep]**, the Field Representative who is leading this M&E process with you, will be in touch in the coming days to provide more details and next steps, and work with you to schedule specific days and times to meet. They will also identify what will be covered virtually or in-person.

To support any costs incurred through virtual and in-person visits, including translation, airtime fees, data charges, or transportation, the SLF will be adding a CAD [amount] transfer to your next Agency Agreement (AA) instalment. You are not required to report on this stipend and can use it as needed.

We know this will take time from your already busy schedules, and we appreciate your flexibility and willingness to accommodate the M&E process.

If you have any questions or concerns, please contact me, and I will be happy to help.

With warm regards,

[Insert signature]

Appendix E: Field Rep email to project partners for a virtual visit

(Adapt as required)

Dear **[CLO partner contact person],**

I am looking forward to meeting with you and the **[CLO partner]** team through our online M&E process **[Insert date if known].**

The purpose of our online conversations, like in-person visits, is to gain an understanding of your organization as a whole, learn how you are coping and adapting to changing contexts as a result of COVID-19, and for an update on the SLF-supported project.

Here are some details to help with planning:

We will schedule a series of WhatsApp, Zoom, or phone calls to discuss:

- Organizational overview with the executive director and/or relevant staff members (1–1 ½ hours)
- Project, management, and administration overviews, including a review of the Agency Agreement and Narrative Reports with the executive director and/or relevant staff members (2 hours)
- Financial management overview with the finance manager and/or relevant finance team member (1–1 ½ hours)
- Meeting with board or steering committee members (0.5–1 hour)
- Meeting with clients (if possible) (1–1 ½ hour)

A checklist is attached to help you prepare for the meetings, including documents to provide. Please complete the schedule in the checklist and include all relevant contact details.

Please also feel free to ask any questions you may have and share any ideas that could help strengthen this M&E process. We are happy to schedule a call.

With warm regards,

[Insert Signature]

Appendix F: Field Rep email to project partners for a hybrid (in-person and online) visit

(Adapt as required)

Dear **[CLO partner contact person],**

I am looking forward to meeting with you and the **[CLO partner]** team for our online meetings on **[Insert date(s) if known]** and a one-day in-person M&E visit on **[Insert date if known]**.

The purpose of our hybrid **(in-person and online)** M&E process will be to get an understanding of your organization as a whole, learn how you are coping and adapting to changing contexts as a result of COVID-19, and for an update on the SLF-supported project.

Here are some details to help with planning:

With guidance from your SLF contact person, you will create a schedule for in-person and online visits, based on the purpose of the visit.

We will schedule a series of WhatsApp, Zoom or phone calls for virtual visits, and set up in-person meetings to take place on a single day to address the following:

- Organizational overview with the executive director and/or relevant staff members (1–1 ½ hours)
- Project, management, and administration overviews, including a review of the Agency Agreement and Narrative Reports with the executive director and/or relevant staff members (2 hours)
- Financial management overview with the finance manager and/or relevant finance team member (1–1 ½ hours)
- Meeting with board or steering committee members (0.5–1 hour). **[If there are no concerns around governance, the meeting can be virtual.]**
- Meeting with clients and community members are prioritized for in-person meetings (2 hours, depending on travel)

A checklist is attached to help you prepare for the meetings, including documents to provide. Please complete the schedule in the checklist and include all relevant contact details. All supporting documents should be emailed to the Field Representative at least one week prior to the visit.

This is a new way of working together for all of us. If you have any ideas that could strengthen this process, or if you have any questions, please let us know. We are happy to schedule a call.

With warm regards,

[Insert signature]

Appendix G: Planning checklist for a virtual Field Rep visit

(Document shared as an email attachment)

Name of organization:

Date of Field Rep visit:

Name of Field Rep:

We will schedule a series of WhatsApp, Zoom or phone calls over two days to address the following:

- Organizational overview with the executive director and/or relevant staff members (1–1 ½ hours)
- Project, management, and administration overviews, including a review of the Agency Agreement and Narrative Reports with the executive director and/or relevant staff members (1½–2 hours)
- Financial management overview with the finance manager and/or a relevant finance team member (1–1 ½ hours)
- Meeting with board or steering committee members (30 minutes–1 hour)
- Meeting with clients and community members, if possible (1–1 ½ hour)

Position/Role	Name	Preferred contact method (Zoom, WhatsApp, or phone)	Contact details for Zoom/WhatsApp	Date and time of meeting/ Interview (include time zone)
Organizational overview				
Project, management, and administration overview				
Financial management				
Board member/governance structure				
Clients				

Project documents, as applicable — to be shared with the Field Rep 1 week prior to meeting

Document	Date Sent
Strategic plan	
Board minutes (for previous 3 meetings)	
Organogram (graphical representation of organizational structure)	
Annual report (most recent)	
Evaluation reports	
Workplans	
Minutes of staff meetings and review sessions	
Samples of M&E tools	
Project proposal (for preliminary visit)	
Other relevant policies, procedures	

Finance documents, as applicable — to be sent one week prior to meeting

Document	Date Sent
Audit (recent)	
Scan or copy of three recent bank statements	
Scan or copy of three recent bank reconciliations	
Cashbook or ledger	
Budget tracking documents	
Finance policy	
List of current funding sources and amounts	
Other relevant documents	

Appendix H: Planning checklist for a hybrid Field Rep visit

(Document shared as an email attachment)

Name of organization:

Date of Field Rep visit:

Name of Field Rep:

We will schedule a series of half-day meetings via WhatsApp, Zoom or phone calls, and one day for in-person visits. **[Determine with the CLO/partner which meetings will be online or in-person based on the purpose and requirements of the visit.]**

- Organizational overview with the executive director and/or relevant staff members (1–1 ½ hours)
- Project, management, and administration overview, including a review of the Agency Agreement and Narrative Reports with the executive director and/or relevant staff members (2 hours)
- Financial management overview with the finance manager and/or relevant finance team member (1–1 ½ hours)
- Meeting with board or steering committee members (30 minutes–1 hour). **[If there are no concerns around governance, the meeting with the board member could be done virtually.]**
- Meeting with clients and community members are prioritized for in-person meetings (2 hours, depending on distance)

Position/Role	Name	Preferred contact method (Zoom, WhatsApp, or phone)	Contact details for Zoom, WhatsApp or phone	Date and time of in-person meeting/ online interview (include time zone)
Organizational overview				
Project, management, and administration overview				
Financial management				
Board member/governance structure				
Clients, community members, and other stakeholders				

Project documents, as applicable – to be sent one week prior to meeting

Document	Date Sent
Strategic plan	
Board minutes (for last 3 meetings)	
Organogram (graphical representation of organizational structure)	
Annual report (most recent)	
Evaluation reports	
Workplans	
Minutes of staff meetings and review sessions	
M&E tools	
Project proposal (for preliminary visit)	
Other relevant policies, procedures	

Finance documents, as applicable – to be sent one week prior to meeting

Document	Date Sent
Audit	
Scan or copy of three recent bank statements	
Scan or copy of three recent bank reconciliations	
Cashbook or ledger	
Budget tracking documents	
Finance policy	
List of current funding sources and amounts	
Other relevant documents	

Championing health and human rights with community-led partners to respond to the HIV epidemic in sub-Saharan Africa.

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