

## PARTNERSHIP DISCUSSION PAPER

### 1 INTRODUCTION

At the request of the PDAP Canadian Secretariat, questions on the partnership issue were added to the needs assessment study done by the Development Workshop for the PDAP Development Education Advisory Committee. The objectives were:

1. to explore PDAP members' views on partnership, specifically principles of partnership, levels of organization and areas of activities where the membership prefers to develop partnership relations;
2. to inventory resources that can be potentially be shared by member agencies in PDAP partnership activities;
3. to recommend measures to the Partnership Advisory Committee that will help foster the development of partnership relations within PDAP.

Eleven out of the 12 implementing members and three out of the seven associate members participated in the study. Among the implementing agencies, only the Canadian Rotary Committee for International Development (CRCID) did not ~~reply~~ accomplish the survey form, the CRCID representative was, however, interviewed. Associate agencies that responded are Project Bata, Canadian Cooperative Association and International Marinelife Alliance Canada).

### 2 FINDINGS

#### 2.1 Current Links: Development Assistance

The PDAP membership has diverse sectoral concerns although there are some areas of common interest to most agencies: child welfare, women, environment, training and income generation. Slightly over a third (36%) of the agencies

supported projects in the Philippines before PDAP's inception and close to two-thirds of the members currently support nonPDAP projects in a variety of sectors. NonPDAP projects are mostly with the members' traditional partners.

Most of the agencies make 1-2 visits a year to the Philippines. Three agencies - CCA, Save the Children B.C. and Project Bata - currently have staff members who have worked in the Philippines. For Project Bata, five of its volunteer staff are all former Philippine residents trained in social work. Excluding Project Bata, a total of some 22 staff members from the agencies surveyed have visited the Philippines. Eight of the agencies (Project Bata not included) have at least 2 agency staff members who have visited the Philippines.

Field visits to the Philippines by member agencies are, however, not the most important sources of information on the Philippines for the membership. Agencies state that Philippine NGO partners (through project reports and other materials) are the most important source of information.

## 2.2 Current Links: Development Education

Except for the Canadian Rotary Committee for International Development, all the agencies contacted have some form of development education programme in Canada. (Christian Children's Fund stated that it does not have a development education programme as such, but its regular publication features education materials on its projects overseas. For CRCID, education activities are the function of local and regional Rotary Clubs). The specific objectives and content of development education programmes vary widely depending on the agencies' specific mandates. Current development education activities in Canada are primarily geared to information and education; action and advocacy activities are secondary. Most of these activities are closely tied with

fundraising.

Development education activities receive a substantially smaller share of most of the members' financial resources compared to overseas development assistance. Sixty four percent of the agencies estimate that they spend less than 6 percent of their total agency funding on education activities. Nonetheless, a variety of development education activities are supported by member agencies. Some 30 development education events are sponsored by agency members each year. Most agencies also produce at least one regular publication for its education activities.

Nine of the agencies have made attempts to link their overseas project work with education activities in Canada through such methods as preparing media features (both print and audio-visual), visits, and exchanges (by Filipinos to Canada and by Canadians to the Philippines).

### 2.3 Partnership Principles

Although some key principles of partnership emerge as more critical to the members than others, the members surveyed do not as yet have a commonly held understanding of the concept of partnership. The principles deemed important by member agencies are: a common understanding of development problems in the Philippines (71%); @agreement to share resources, information and exchange ideas (50%); @mutual recognition and respect (50%) and agreement on a common set of purposes and goals (43%) . Only 2 of the agencies - YM/YWCA and CCA - have actually developed a statement on partnership.

While PDAP members agree that partnerships are desirable, they note that partnerships are very demanding on agency resources, especially for the smaller NGOs. Funding constraints, especially limited staff, are the most serious constraints agencies face in entering developing partnerships. The increasing use of NGO consortia programming in development

assistance for specific countries or geographic regions also increases demands on staff of the member agencies. More than 75 percent (9 out of 12) of the agencies contacted are members of 4 or more NGO consortias (PDAP included). Christian Children's Fund Canada tops the list with membership in at least 12 other NGO consortia, followed by Oxfam-Quebec with 10 other memberships.

It is also important to note that 79 percent (11 out of 14) of the PDAP members are also members of the Philippine Canadian Human Resource Development Program (PCHRD).

#### 2.4 Preferred Organizational Levels for Partnerships

Partnerships can be developed at different organizational levels such as:

1. one-on-one partnerships with other Canadian NGOs, with the Philippine secretariat, with endorsers, with Philippine NGO project holders or with people's organizations.
2. cooperative partnerships involving three or more parties - Canadian NGOs, the Philippine secretariat, Philippine endorsers, Philippine NGOs or with people's organizations.

Members contacted are open to partnerships with other Canadian NGOs both on a one-on-one or on a cooperative basis. In contrast, for Philippine partners - expectedly - there tends to be at this stage a preference for continuing with one-on-one partnerships. The members, however, express a desire to develop more partnerships with the Philippine NGO project holders. The intent is to move from a concentration of relationships with endorsers characteristic of PDAP Phase I to the next lower organizational level.

## 2.5 Preferred Areas of Activity for Partnerships

Project funding, development education, and project development, consecutively are the preferred areas of partnership activity. Few agencies express interest in developing partnerships related to advocacy and fund raising activities.

Agencies have expressed a desire to move from simply a donor-donee relationship which dominates project funding activities. Developing "people-to-people links" through relationships both between Canadian and Philippine NGO staff and between Canadian NGO constituencies and Philippine project participants or beneficiaries is how real partnerships can evolve from project funding activities.

Focussing funding on projects of Philippine NGOs that have previously received agency assistance and less on projects of new or first-time recipients is seen as important in progressing from a donor-donee relationship to a more meaningful partnerships. At the project level, funding what PDAP terms as participatory partnerships, i.e., second-time (or more) projects of Philippine NGOs supported by a Canadian NGO through PDAP will also promote partnership development.

To some agencies, a criteria for pursuing partnerships is that the Philippine partners have shown a capacity to manage resources and to be accountable.

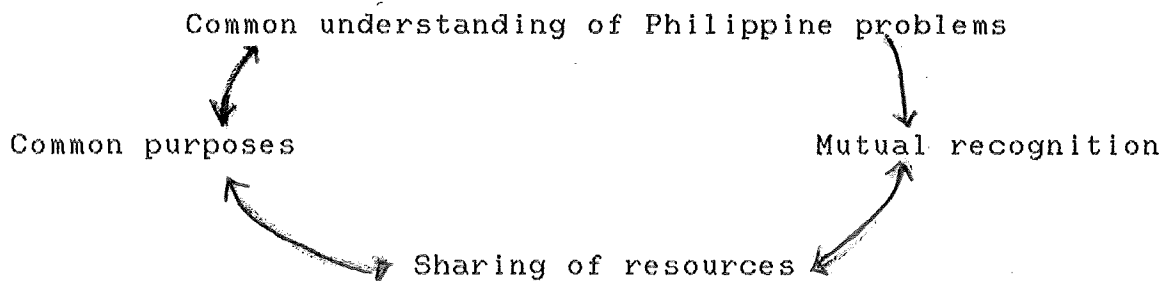
In development education, agencies contacted are more open to cooperative partnerships especially in producing educational materials such as audiovisual presentations. Several agencies stress, however, that there should be an agreement between Canadian NGOs and Philippine partners on the "message" to be transmitted by the PDAP programme to the Canadian Half of the agencies contacted express interest in developing partnerships through working both with Philippine endorsers and with NGOs in project development.

Member agencies view PDAP's role as that of a facilitator in developing partnerships. Specific suggestions as to how PDAP can facilitate partnerships include: providing timely information on NGOs and their current initiatives both in Canada and the in the Philippines, documenting successful NGO initiatives and cooperation between Canadian and Philippine NGOs; supporting activities that promote linkages between and among Canadian and Philippine organizations such as exchanges, study tours; providing staff support that would focus on the the development of partnership relationships.

### 3 CONCLUSIONS AND RECOMMENDATIONS

Partnership development has recently been the subject of considerable discussion and a certain amount of confusion among NGO circles. About a year ago Partnership Africa Canada comissioned a study to examine the concept of partnership from the African and Canadian perspectives. Early this year, a major Asian regional consultation was held to analyse development partnerships. The confusion stems in part from the somewhat indiscriminate use of the term and from the fact that there is yet no commonly held understanding of the concept of partnership.

The PDAP membership as well does not as yet have a commonly held understanding of the concept of partnership although some agreement has been expressed on what constitutes the key principles of partnership, these are:



At this point it is useful to note a conclusion from the recent Asian Regional Consultation: Strategic Analysis of Development Partnerships in Asia held in Chiangmai, Thailand 5-9 February 1990: "Partnership is a continuum evolutionary process where organizations involved are learning from each other." Because of the evolutionary nature of partnerships, PDAP cannot codify a set of procedures and rules of conduct on partnerships in the way that it has for project funding applications, approvals, monitoring and evaluation. The task for the PDAP Partnership Advisory Committee is to take leadership in identifying conditions that will facilitate or promote development partnerships and to oversee their attainment in the different areas of PDAP activity -- development assistance, development education, training, etc.

A broad outline of what may be the elements of an operational strategy for the Partnership Advisory Committee is as follows:

1. working towards the goal of developing equitable relations among parties involved.

Partnerships imply an equitable relationship. This, however, is difficult to achieve when the parties have an unequal access to resources and hence to the power and influence that derive from these. Canadian NGOs clearly have greater access to resources relative to their Philippine counterparts. This poses a basic difficulty about equality of relationships.

PDAP's advantage, however, is that the structures and procedures that have been developed over the first phase have sought to redress this imbalance by ensuring that parties are given equal opportunity to express their needs and to participate in decision making.

During PDAP Phase II these participatory mechanisms should be enhanced by a concerted institutional development effort. By institutional development we refer here to building capacity in existing institutions to promote sustainable development (details of this element are discussed below).

2. support institutional development efforts in Canada and in the Philippines.

Developing partnerships and institutional development efforts are inextricably linked. Effective partnerships require that the partners evolve towards greater equality in all facets of their relationship. The premise is institutional development will enable partners to enter into more equitable and sustainable relationships. Before we proceed with specific recommendations on institutional development, it is useful to outline briefly what may be considered as basic elements of capacity building strategies. Capacity building focuses on developing process capacity in institutions and at the same time on improving organizational performance.

To develop process capacity, interventions are geared towards creating a learning environment where beneficiaries and organizations can learn to work together to plan, implement and evaluate development programs as for example, developing linkages between community groups and project holders in order to share design and implementation responsibilities. Complementing process capacity is a set of interventions typical of the more traditional institutional development efforts undertaken by organizations -- improving management skills and abilities among staff (e.g., through training) as well as improving management functions (e.g., budgeting, planning, monitoring). The precise mix of of these two sets of interventions will vary with the specific context and with the existing capacities of the parties involved.

A brief review of the PDAP reports indicates that the Philippine Committee members as a whole and as individual organizations have supported a variety of training, capacity building types of activities. As among the initial activities first step it is suggested that a stocktaking of these efforts be undertaken by the Partnership Advisory Committee in coordination with the Philippine Committee and the PDAP Philippine Secretariat. It is suggested that the assessment be designed to address the following issues:



- a. What training needs/areas have been addressed?
- b. What groups and which organizational levels have been reached by the institutional development efforts to date?
- c. (Selectively, if possible) How have the trainees made use of skills learned in their actual working situations?
- d. What resources are available to address institutional development needs? What institutional arrangements are possible to carry out institutional development initiatives?
- e. What are the priority areas for further institutional development intervention during PDAP Phase II?

This assessment along with the inventory of resources in Canada (collected through the development education needs assessment) can form the basic input to the development of an institutional development strategy for PDAP Phase II.

3. promote the exchange of information and experiences among organizations.

(NOTE: Although information and communications - as management functions - are generally regarded as part of institutional development efforts we have chosen to treat this separately because of its importance to PDAP members).

Information is a basic resource in developing partnerships. Members stress the need for up to date and current information. Information generally serves 2 closely related purposes: to assist organizations in the performance of their tasks, and to record organizational experience and hence facilitate organizational learning.

Improvements in the type, quality, and flow of information

have to be addressed systematically, i.e., it has to be viewed as a system from collection, processing, analysis, storage, and through to dissemination of information.

The information flow relative to a given project appears to be well established from the project holder -> the endorser -> Philippine Secretariat -> Canadian Secretariat -> Canadian NGO supporting project. There are indications, however, that - at least in Canada - information flow tends to be linear with the project being the locus of information generated. Exchange of information between member agencies tends to be minimal, especially between implementing agencies and associate agencies. (In general, it seems - though we cannot be conclusive since only 3 of the associate agencies were contacted - that the potential contributions of associate agencies in different PDAP activities has not yet been fully tapped). Within, a given agency, in a couple of cases, information was restricted to the staff responsible for projects; development education staff were not even aware of PDAP activities of their respective agencies.

Thusfar, information collected broadly falls into 2 general categories: project monitoring information which Philippine NGOs/endorsers/Secretariat generate to meet specific reporting requirements of supporting Canadian NGOs or the Canadian Secretariat and general information, current events like the news clippings collected and distributed by the Canadian Secretariat. Less information exists - or perhaps it exists but it is less accessible - on learnings from project experience, on what specific approaches or interventions work, under what conditions.

Several agencies also note that though there is a lot of information available this is not always easily accessed or is not readily useful.

Given the above, we suggest that interventions to improve PDAP's information system give attention to the following:

- a. Promoting a more multidirectional (i.e. between and among Canadian NGOs, Philippine NGO project holders and endorsers) flow and exchange of information about effectiveness of specific development interventions.
- b. Developing a learning repository for PDAP'S collective development experience. This repository will collect information on specific approaches or interventions work that have worked (or failed), under what conditions, partnership experiences etc. A corresponding strategy to disseminate this information in the Philippines and in Canada should be developed.

A new structure is not necessary to be set up for such a repository. This may be housed with either the Philippine Secretariat whose responsibilities include the building up of a data bank on Philippine development projects or with a Philippine Committee member which already collects similar information.

An adjunct to the development of this repository is the strengthening of applied research capacity among the PDAP membership through institutional development interventions. Early establishment of a strong applied research capacity that continually fed back into the planning/ programming process was, for example, a key factor in the success of the Bangladesh Rural Advancement Committee.

- c. Examining ease of retrieval and use of information collected at various nodes of the PDAP information system. Information technologies for the creation and management of bibliographic data bases are now readily available at little cost for use with personal computers by information and documentation centres (for example, UNESCO'S CDS/ISIS package). Here the Partnership Advisory Committee can also play a supportive role in helping to access other Canadian assistance (for example from the Information Sciences Division, International Development Research

Centre) to improve the organization and retrieval of information.

- d. Providing resources for organizing and implementing different fora to exchange information and experience such as workshops, networks, study tours and exchanges within the PDAP network as well as in similar NGO consortia. For example, Partnership Africa Canada plans to sponsor a conference on Partnership, PDAP may wish to be involved in this effort.

#### 4. design specific incentives to encourage organizations to develop partnerships

Current procedures of PDAP such as higher funding limits for participatory and cooperative types of partnership projects and travel support to a great extent already provide incentives for partnership development. We suggest development of incentives for collaborative pilot and experimental projects to enhance learning about partnership relations as well as for coalition building types of initiatives.

#### 5. periodic evaluation of partnership relationships

Given that partnership is an evolutionary process it is important that whatever operational strategy the Committee adopts it should set for itself the task of periodically evaluating the partnerships as they develop. We recommend a review of current monitoring and evaluation requirements to ensure that these generate information which will enable the Committee to evaluate partnerships.