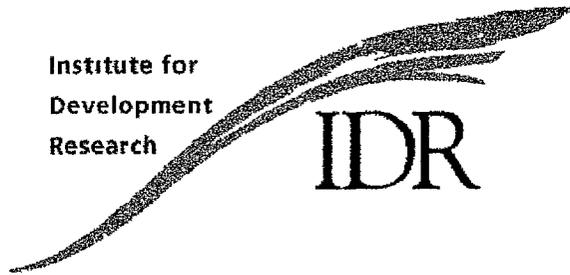


Institute for
Development
Research



**Strengthening North-South Cooperation
US PVOs & African NGOs**

**Report of the Conference
held March 2-5, 1999 in Nairobi, Kenya**

Darcy Ashman
Institute for Development Research
&

T S Muyoya
MWENGO
Harare Zimbabwe

May 30 1999

*Based on conference proceedings and follow-up contributions
From participating organizations*

Acknowledgments

The authors appreciate the financial support of the Office of Private Voluntary Cooperation (PVC) of the US Agency for International Development (USAID) and the in-kind contributions of the participating agencies (see page 2 for a list of their names) Conference co-facilitators Gurudev Khalsa and Godwin Hlatshwayo of the Global Excellence in Management Initiative (GEM) John Yanulis of IDR and Kisuke Ndiku of MWENGO provided very helpful input as well as facilitation Ndiku's interpretation of African community members' participation in the interviews was instrumental in shaping the case reports Finally very valuable feedback on the conference report was received from most of the conference participants our co-facilitators and L David Brown IDR

Preface

The Conference on Strengthening North-South Cooperation, held from March 2-5, 1999 in Nairobi, Kenya, convened ten private development agencies from Africa and the United States to discuss ways of improving cooperation between African nongovernmental organizations (NGOs) and U S private voluntary organizations (PVOs) The conference was part of an action research project organized by the Institute for Development Research (IDR) of Boston, MA, together with MWENGO, of Harare, Zimbabwe, and the Global Excellence in Management Initiative (GEM) of Washington, DC and Cleveland, Ohio The project was financially supported by The Office of Private Voluntary Cooperation (PVC) of the United States Agency for International Development (USAID) and in-kind contributions from the participating agencies

Table of Contents

Project Background and Conference Participants	1
Conference Goals and Agenda	2
A Preview Innovative Conference Findings	2
Case Presentations	4
Common Themes Principles, Practices, and Action Strategies	9
Partnership Phase #1 Start-Up Phase	11
Partnership Phase #2 Operating Phase	10
Partnership Phase #3 Weaning Off Phase	11
Effective Partnering Process Communication	12
Capacity to Cooperate International NGOs	13
Capacity to Cooperate African NGOs	14
NGO Financial Sustainability	14
Managing the External Environment	15
Action Steps Strengthening the Participating Partnerships	16
Impact and Follow-Up from the Conference	17
References	19

Strengthening North-South Cooperation

Conference Report by Darcy Ashman & TS Muyoya

Executive Summary

The Conference on Strengthening North-South Cooperation, held from March 2-5, 1999 in Nairobi, Kenya, convened ten private development agencies from Africa and the United States to discuss ways of improving cooperation between African nongovernmental organizations (NGOs) and US private voluntary organizations (PVOs). It was organized by the Institute for Development Research (IDR) of Boston, Massachusetts, together with MWENGO of Harare, Zimbabwe, and the Global Excellence in Management (GEM) Initiative of Washington, DC and Cleveland, Ohio. The conference was part of a research project financially supported by The Office of Private Voluntary Cooperation (PVC) of the United States Agency for International Development (USAID) and in-kind contributions from the participating agencies.

The goals of the conference were to improve understanding of how effective partnerships evolve, identify principles and realistic action strategies for strengthening cooperation between US PVOs and African NGOs, and develop concrete action plans for the participating agencies. These goals were addressed through an action learning process consisting of four major steps: participants presented their own cases and reflected on them together with representatives of other partnerships, the group generated a list of common issues and themes found in the cases, the group prioritized issues and developed principles, practices and action strategies for five core themes, and each partnership developed an action plan for strengthening its own cooperation.

Innovative Findings

In IDR's view, four major findings of the conference contribute new understanding and guidance for strengthening cooperation between US PVOs and African NGOs:

Effective partnerships are vision-centered rather than partner-centered Joint agreements and mutual responsibilities are based on a shared vision of the central role in sustainable development of African civil societies, and especially of African NGOs as development catalysts and service-providers.

Common partnership principles take diverse partnership forms Cornerstones of effective partnerships are mutual understanding, trust and influence, actual partnership agreements vary with respect to type of support from the PVO (funding, capacity building, informal support) and length of the relationship (long-term to short-term). Effective PVO partners moderate power differences through transparency, flexibility and capacity building.

"Weaning off" is a culturally appropriate way of planning for sustainability The difficult issue of terminating financial support was broached by discussing it in terms relevant to African NGOs. African NGOs perceive exit strategies as being imposed suddenly by PVOs, with the result that it is difficult to sustain project activities. Weaning off, an African concept related to the process by which adults become independent from their families, indicates a more effective strategy which would include mutually agreeable stages of capacity development leading to a point where African NGO partners can sustain projects and programs themselves.

Understanding the wider systemic factors involved in PVO-NGO partnerships is essential Most frameworks for understanding partnerships are limited to the two organizations directly involved, yet the conference discussion showed that PVOs and NGOs are involved in a partnership chain which extends

from donors through them to the African communities. Donor policies can hinder or support PVOs' efforts to respond to NGO needs. Host country governments can create an enabling or disabling environment for PVO-NGO cooperation. Partnerships can be strengthened through joint action as allies to influence wider systems and the environment.

Core Themes

The five core themes prioritized by the conference participants include

- (1) Partnership Phases-Start Up, Operating and Weaning Off*
- (2) Partnership Process-Communication,*
- (3) Strengthening the Capacity to Cooperate-US and African NGOs,*
- (4) NGO Financial Sustainability*
- (5) Managing the External Environment*

For each theme, participants discussed important principles and practices, barriers and realistic action strategies. These results are directly applicable to other partnerships between US PVOs and African NGOs.

Case Presentations

There were two partnerships each from Kenya and Ethiopia, and one from Malawi. Two represented spin-offs of successful PVO programs into local NGOs, two represented well-established long-term partnerships between PVOs and local NGOs, and one was a new visionary partnership between a project office within a PVO and its seven local partners (one of the seven attended the conference).

Action plans

Next steps to strengthen the partnerships included a range of goals: developing mutually agreed-on M&E and reporting guidelines, capacity building in technology and fund-mobilization, planning for the end of current agreements, whether through 'weaning-off' or extending and renegotiating partnership, building mutual trust and confidence, and influencing government policy through active participation in the national NGO network.

Conference impact and follow-up

Participants reflected on ways in which the conference impacted them and their partnerships. Four major themes emerged:

- (1) It is helpful to reflect on one's own partnership and learn from others.
- (2) Partnership is much more than formal agreements and exchange of funds and reporting-it involves human relationships, team spirit, openness and flexibility.
- (3) Effective partnerships require a lot of effort and constant review.
- (4) Partnerships extend from communities to NGOs to PVOs and external donors.

IDR, MWENGO, and GEM will finalize case reports and the conference report. Opportunities (and deadlines) for feedback from participants will be given before drafts are finalized. Each participating partnership will receive a copy of the conference report and its own case. The report and cases will be disseminated to African, US, and international NGOs and networks through the channels of the facilitating organizations. In response to participants' requests for a follow-up conference, MWENGO, with support from IDR and GEM, will take the lead in exploring this possibility.

Strengthening North-South Cooperation

Conference Report by Darcy Ashman & TS Muyoya

Project Background and Conference Participants

Strengthening North-South partnerships to be more equitable and effective has been a priority of most Northern and Southern development agencies since at least the mid-1980s. Many studies and organizational self-studies have been conducted to determine the principles and practices of effective partnership. Most definitions of partnership include the cornerstones of mutual respect, trust and mutual influence. However, recent research suggests that there is a gap between the perceptions of Northern and Southern NGOs concerning the extent to which partnership ideals have been put into practice (Leach, Kalegaonkar & Brown, 1998, IFCB, 1998). Many US PVOs say that influence has shifted to their Southern partners, primarily in program implementation (Leach, Kalegaonkar & Brown, 1998). However, Southern NGOs, especially in Africa, say they have little influence in their relations with Northern agencies. African NGOs value the financial resources received, but report that cooperating with Northern NGOs threatens their missions and autonomy (IFCB, 1998).

Current trends indicate that many US PVOs anticipate a higher level of working in partnership with Southern NGOs in the next five years, primarily in order to achieve sustainable development impacts. Expanded efforts to work in partnership are more likely to be successful in they are based on a better understanding of what makes partnership effective from the perspectives of *both* Northern and Southern actors. The focus of this research is on the ways in which systemic factors, such as organizational arrangements and external stakeholders, influence joint activities. Research project goals include

- Better understanding and case studies of the evolution of partnerships,
- Improvements in the systems and processes of participating partnerships,
- Dissemination of key lessons, practices, and systems to improve North-South cooperation in other settings

The participating organizations were selected from among nine partnerships of US PVOs and African NGOs that volunteered to participate in the project. They were all located in Eastern and Southern Africa, involved programs widely implemented by PVOs and NGOs, and were committed to action learning. Some were long-term partnerships which had evolved over ten years or more, while others were relatively new initiatives, including two spin-offs of PVO programs into indigenous NGOs.

Prior to the conference, African-US research teams interviewed each of the participating organizations about how their partnerships had evolved, eliciting both lessons learned and challenges they were facing. The findings were summarized in draft case reports and distributed to the participants before the conference.

African NGO	US PVO partner	Program focus	Age of partnership
Farming Systems Kenya (FSK) Nakuru Kenya	Lutheran World Relief (LWR) Nairobi Kenya & New York	Self-reliance promotion & loans to small farmers	11 years
Business Initiatives and Management Assistance Services (BIMAS) Embu Kenya	PLAN International Nairobi Kenya & Washington DC	Microfinance	5 years as PLAN program 1 1/2 years as partnership with indigenous NGO
Nazareth Children's Center and Integrated Development (NACID) Addis Ababa Ethiopia	Catholic Relief Services Addis Ababa Ethiopia & Baltimore MD	Integrated health agriculture & women's savings & credit	10 years
Kangaroo Child and Youth Development Society (KCYDS) Addis Ababa Ethiopia	Save the Children Fund Addis Ababa Ethiopia Westport CT & Washington DC	Basic education access & quality	2 years
DevCentre Malawi	World Learning Inc Washington DC	Management training & technical assistance to civil society organizations	8 years as World Learning program 2 years in transformation to NGO

Conference Goals and Agenda

The conference was based on an action learning model it progressed from collective goal setting to sharing partnership experiences to discussing the common themes and lessons learned Principles, practices and barriers or challenges were explored in depth on issues selected by the participants Finally, participants developed action plans for strengthening their own partnerships and discussed follow-up and dissemination activities

Participants and facilitators shared three major goals for the conference reflecting as a group on current partnerships, exploring principles of effective partnerships, and developing concrete recommendations to enable partnerships to improve their effectiveness The agenda progressed as follows

- Day 1 Conference Themes and Goals, Begin Case Presentations
- Day 2 Complete Case Presentations, Identify Common Themes and Issues
- Day 3 Prioritize and Discuss Key Issues, Recommendations for Action
- Day 4 Action Planning in Individual Partnerships

A Preview Innovative Conference Findings

In IDR's view, conference discussions yielded many interesting new insights and recommendations for improving cooperation, as per the project goals Joint facilitation by US and African researchers created an enabling environment for both US and African participants This section highlights the most innovative perspectives emerging from the conference Specific lessons learned and guidelines applicable to other partnerships are provided in this section, which summarize the case presentations, common themes and issues, and action plans

Effective partnerships are vision-centered rather than partner-centered

Strong partnerships are based on a shared vision of strengthening African civil societies, with NGOs as leading development catalysts and service-providers Many partnership studies and guidelines focus on

ways in which the organizations involved relate to each other, negotiate agreements, carry out responsibilities, and evaluate impacts. These are important elements of partnership, but if they are not based on a strong shared vision of the central role of national NGOs, they do not build cooperative relationships that lead to mutually desired impacts.

Many US PVOs are shifting and expanding their roles from direct operations to capacity building of African NGOs. Effective partnerships are built on complementary, not competing, roles. PVOs in this study are transferring successful programs to new local NGOs and expanding their support from funding programs to investments in capacity building. Some PVOs have a track record of operating through local partners, they are therefore useful sources of ideas and practices.

A strong common vision can lessen the impact of power differences on the partnership, because both partners are guided by shared criteria for success. In the two long-term partnerships, US PVOs have supported African NGOs for ten years. They have grown from nascent local groups into well-known and respected organizations.

Common partnership principles take diverse partnership forms

The Chinese saying could be modified to "let a thousand partnerships bloom." Most participants, Africans and Americans alike, agreed on similar common principles of successful partnerships, including mutual understanding, trust, and influence between African and US organizations. Project participants have broken with past patterns of 'donor-recipient' relations in which the PVOs, as funders, dominated local African NGOs. In partnerships where the greater influence of US partners was acknowledged, ways of moderating the power differences through practices such as flexibility, transparency and capacity building were pointed out. Yet there was no single model of partnership demonstrated by the cases. They ranged from long-term relationships with significant funding components to newer spin-offs and short-term capacity-building projects. African NGOs and US PVOs are working creatively with their present realities to improve and enhance relationships to be more effective and equitable.

"Weaning off" is a culturally appropriate way of planning for sustainability

One of the most critical issues concerning both US and African development organizations is how to deal with the inevitable end of project support, especially financial resources. Both African and US agencies want to promote self-sustaining development results and avoid dependency, yet due to their economic context, the need of African NGOs for financial and technical resources remains consistently high. Strong concerns with sustainability were expressed by virtually all of the partners during the interviews. A number of African NGO participants raised the issues of "weaning off", as they put it, at the outset of the conference. Substantial progress was made. Issues were discussed from both US and African perspectives, a number of suggestions for improvement were made, and virtually all of the partnership action plans included some attention to the process by which the African NGOs would become less dependent on the US PVO.

Three aspects of the "weaning off" concept have broad relevance. First, by framing the issue in a culturally familiar way, significant ambiguity and tension was reduced for many of the African NGO participants. "Exit strategy" may sound normal and predictable to a US practitioner, but Africans do not share the same cultural context which gives it meaning. "Weaning off", on the other hand, is a familiar and accepted concept of how one becomes independent, based in the African family context. Second, "weaning off" is the last in a series of stages in the process of increasing independence. Conference participants agreed that both parties should discuss and agree on a series of steps which would enable the African NGO to be able to achieve project objectives and fully sustain projects and programs at a certain point in time. Third, adult Africans remain interdependent with their family members, relationships continue past weaning off, even though they take different forms. Both US and African conference participants voiced the value of on-going relationships that may not include much direct funding.

Experience-sharing, technical assistance and regular communication are all ways of continuing relationships beyond financial dependency that continue partnerships for sustainable development

Moving beyond a relational to a systemic understanding of effective partnerships is essential

Many partnership studies and guidelines have focused on improving the relationships between the US PVOs and African NGOs, both at the interpersonal and organizational levels. Yet as noted above, the gap in perceptions of success between Africans and US practitioners remains wide, despite a decade of efforts to improve partnership. This action research project shows that some reasons for the continuing perceptions of northern dominance by southern NGOs lie in systemic factors beyond the immediate control of the individual partnership implementers. These factors strongly influence their choices, policies, and practices. Donor policies and procedures make it possible to provide funds to African NGOs, but they also can limit the flexibility of US PVOs in the field. Internal auditing procedures in historically operational PVOs can hinder otherwise responsive program personnel. Host country governments and macro-political or economic forces can make it impossible for NGOs to achieve desired program results. They also can stimulate emergency needs for new resources from external partners. Partnerships can be conceived of as a chain, from donor to community, through the US and African agencies. They operate in a dynamic environment, to which they must respond strategically, in order to maximize program benefits for sustainable development.

Case Presentations

Each of the partnerships shared their own experiences, describing the background and programmatic focus of the partnership, the elements which made it effective, the barriers that had been successfully addressed, and the challenges still remaining.

BIMAS-Plan International

BIMAS is a new local NGO created by PLAN and local Kenyan stakeholders to take over PLAN's 'high performance' microfinance program in Embu, Kenya. Registered as an independent organization in 1993, BIMAS became operational in late 1997, and currently serves about 1000 small entrepreneurs. BIMAS is planning to expand its number of clients and become financially sustainable as of 2000. Two driving forces behind the 'spin-off' were the investment and strong ownership of communities in the microfinance program and the shared vision of key staff within PLAN, at both the country and international levels, of creating a locally based, sustainable, microfinance institution. It was not easy for PLAN to let go of the program and transfer it to a local institution. Without significant organizational and community commitment, it could not have worked.

Creating a spin-off is an enormous and difficult task for a PVO. PLAN invested a substantial amount of financial, technical, and human resources. Two main factors contributing to the effectiveness of the partnership were the community participation and the formal partnership arrangements. Community members participated in planning and forming BIMAS. For its part, PLAN invested significant resources and local Kenyan expertise in developing the formal arrangements, which included a legal agreement and a 3-year funding commitment for the transition. The agreement states the goals and objectives of the partnership as well as the parties' mutual obligations. Other important factors included recruiting and training qualified leadership, e.g. an experienced executive director and locally respected board members. The significant financial and technical resources provided by PLAN have enabled BIMAS to continue the successful microfinance program and build its capacity to operate as an independent organization. More information on the kinds of resources invested in creating BIMAS can be acquired by directly contacting PLAN International's Credit/MED Technical Team in Washington, DC.

Within PLAN, a major challenge was the lack of understanding and commitment to the transition to BIMAS beyond those directly involved in the project. To address these issues, the team worked hard as advocates and educators to encourage other staff to accept and support the process. They realized that many of PLAN's line staff were not accustomed to operating through a partnership, rather than operational, approach, nor to a business-like, high performing, program, rather than a charitable approach. With so many attributes new to PLAN, the program was hard for many to digest, "like a spicy meal". The high turnover of management staff also slowed down the implementation process, as the team had to start all over with new staff. Other actions which helped to smooth the process included emphasizing the distinctive needs of microfinance, submitting a credible proposal for funding and development of the new organization, and reserving a (non-voting) seat on BIMAS' board for PLAN to provide technical assistance and oversight.

From BIMAS' perspective, key barriers included delays in the purchase and transfer of fixed assets, the need to develop ownership and support of key staff (noted by PLAN), including the former PLAN program staff who were hired by BIMAS, increasing the trust level between PLAN and BIMAS, and developing a mechanism to monitor the progress of the partnership. BIMAS and PLAN are still working on several of these barriers. At present, BIMAS and PLAN see themselves as facing two main challenges: ensuring that BIMAS will be independent and financially self-sufficient when the current funding and technical assistance agreements end in 2000, and defining the next stage of partnership.

NACID-CRS

NACID is an indigenous Ethiopian NGO operating relief and integrated community development programs in three regions of Ethiopia. From its beginning as an orphanage for war victims, NACID has grown into a substantial NGO offering programs in health care, education, agriculture, and credit. CRS has played a major role in supporting NACID's development, and at present is its major donor. NACID is one of four major partners of CRS, which has traditionally implemented its programs by working in cooperation with local counterparts. The presenters highlighted the significant level of training (staff and community), technical assistance, and capacity building that CRS has contributed to the partnership. NACID now has the logistical, financial, administrative, and program capacity necessary to design and implement large-scale integrated development programs.

This particular partnership works well because the two agencies share a common development vision, mission & goals. It was strengthened over the years by evolving together from a relief to a development orientation. The partnership is based on complementary needs: CRS needs a strong local partner and NACID needs a reliable source of funding. NACID is a strong and transparent local organization, which meets CRS' organizational criteria, however, a challenge for NACID is locating enough funds for the overhead necessary to administer & report on the large USAID grants it receives from CRS.

After ten years of cooperation, the partners find that the most stubborn barriers to an effective partnership are in the external environment. The process of obtaining agreements from the Ethiopian government for cooperative programs are extremely bureaucratic. They take a lot of time to secure, and involve a high degree of uncertainty and ambiguity. NACID also finds that the donor policies, procedures, systems to which it must adhere are sometimes in conflict with each other. This can create dilemmas such as facing overhead costs of up to 40%, while being granted only 10%, or striving to be financially sustainable, but find barriers to potential strategies in donor or government regulations.

The partners have addressed the barriers associated with the government in two ways. They find that vigorous follow-up can help to keep the agreements on track in the bureaucracy. They also collaborate in NGO forums to develop joint guidelines to submit to the government in order to influence its policy.

KCYDS-SCF-US (PIE)

Kangaroo Child and Youth Development Society is a new indigenous Ethiopian NGO dedicated to improving access to and quality of basic education in Ethiopia (about 38% enrollment rate for school-age children). It currently runs several education programs in Oromia region, and has plans to expand. KCYDS met representatives of Save the Children's Partnerships for Innovations in Education (PIE) when they began to look for funding partners that shared their vision. KCYDS became one of PIE's several local NGO partners.

Although Save the Children has a strong track record in the education field, PIE is a unique program. Funded by the Banyan Tree Foundation, US, PIE is an action research project designed to generate knowledge of (1) better education models in Ethiopia and (2) how to strengthen the capacity of local NGOs to run effective education programs. The Banyan Tree Foundation has been very flexible and generous in giving resources and time to the PIE project.

PIE follows a visionary, process-oriented approach to developing partnerships with local NGOs. They spent 3-6 months just scanning the environment, investigating potential partners and identifying needs. Their criteria for selecting partners were: registered organizations, demonstrated willingness to carry out innovations in education, flexibility and willingness to work in close partnership, shared vision, mission, and working principles, commitment to community participation, and responsive to a community's learning needs. Once they identified partners like KCYDS, they began discussions around issues of vision, mission, and program, rather than focusing on funding. PIE encourages flexible proposals and MOUs are only written up after extensive dialogue produces mutual understanding. PIE does not want to impose its own ideas or methods on its partners.

One of the PIE project's most important contributions to sustainable innovative education programs in Ethiopia is the Basic Education Network (BEN) it has initiated among its partners and other education influencers, influencing government policy. PIE also fosters sustainability by encouraging its partners to look for other sources of funding, even assisting them with proposal writing and accompanying them to other Northern donors. The focus of its capacity-building activities include creative community-based and community-managed programs, cost-effectiveness, child-centered teacher training, and improving organizational capacity.

PIE attributes its effectiveness to several factors, including the flexibility of the donor (Banyan Tree), the time taken by the PIE team to develop partnership and form a feeling of team spirit among partners based on transparency, open communication, mutual understanding and trust, the time taken to clarify expectations and establish common goals (e.g. sustainability, innovation, cost effectiveness, and community based), project proposal and plans were done together (both partners own projects and work together), both agencies remained flexible and were willing to compromise, both understood that they were to learn from one another, both understood the other's limitations, both are comfortable enough with each other to freely discuss problems and successes of programs, and the programs not defined by PIE, nothing imposed by PIE.

Of course, funds are an important part of the support provided by Pie. Funds are released quarterly, so they have a mechanism for checking on the progress of the projects. SCF has offices in many communities, so it is not difficult to communicate. PIE encourages partners to keep bank accounts in local communities, their philosophy is that any mistakes that might be made are part of a learning process ultimately leading to sustainable financial management capacity.

In general, PIE found that the most stubborn barriers to effective partnerships included breaking the donor-recipient relationship image among the local NGOs, clarifying expectations of high amounts of funding (especially since PIE was a US organization), and overcoming local NGOs' reluctance to try

something new and change from the already established system. The creative solutions to these barriers included open communication and trust, transparency concerning limitations and expectations, frequent meetings, solving problems before they get bigger, starting with simple, feasible projects and then expanding from there, building capacity, offering full support (concept of team spirit and cooperation)

DevCentre-World Learning

DevCentre is a new indigenous Malawian NGO created by World Learning to carry forward the goals and objectives of its USAID-financed SHARED Project. Since 1990, the SHARED project has provided grants and technical assistance to Malawian NGOs. In short, through the creation of the DevCentre, World Learning is transforming SHARED into a local NGO support organization.

The mission of DevCentre is "to promote a strong and vibrant civil society through strengthening the capacity of and enhancing the resources available to, local organizations and their partnership efforts with government, communities, the private sector, and donors in order to improve the quality of life of the people of Malawi and empower them to determine their own destiny."

To date, DevCentre and World Learning have taken a number of steps towards creating a new local NGO, naming the institution as DevCentre, developing a Constitution and capability statement, hiring an experienced Malawian national as SHARED Project Director and recruiting a respected local Board of Trustees for the DevCentre, identifying possibilities for new business, requesting land and a building for its office, and developing an on-going strategic planning process. For its part, World Learning has made a commitment to continue providing technical assistance, such as partnering on projects, exchanging information of project opportunities, and sharing new technology, products, and tools.

The relationship reflects two parallel, yet overlapping, partnerships. The first is between World Learning's home office and the SHARED project management unit (PMU), staffed by all Malawian nationals. The second is between World Learning and the DevCentre's board and staff (the same as the PMU).

These steps have been taken through a process of reflection, evaluation and strategic planning by the World Learning offices in Washington and Malawi, with the assistance of the Global Excellence in Management Initiative (GEM). The transformation team is planning for the resource mobilization of the new organization. Key issues to address include deciding on a funding strategy, including finding new donors, tapping private sector resources, endowment funding, earning fees from training and technical assistance, and expanding public relations and marketing capacity. DevCentre must research and respond to the changing needs of the growing Malawian NGO sector. The parties are working on an MOU whereby World Learning could subcontract the remainder of the SHARED project activities and transfer SHARED assets to it when the project ends in 2000.

As they look to the future, three main issues confront the transition team:

- (1) How DevCentre will concretely adhere to its Mission statement,
- (2) How DevCentre will be positioned in the Malawian NGO community,
- (3) How DevCentre will develop relationships with USAID, World Learning and other international and local donors

Farming Systems Kenya (FSK)-Lutheran World Relief (LWR)

FSK was created as a company in 1981 by the Nakuru Region Laypeople Fellowship of the Africa Inland Church in order to help church members in the region, it was registered as an NGO in 1993. FSK provides support to small farmers through a number of activities, including training, credit, research, marketing, and mobilization. At present, FSK has four donor/partners, LWR is its major one. In the past, FSK has had five other bilateral and INGO partners.

The partnership with LWR consists of four major activities, in addition to receiving funds: interaction, through site visits and monitoring reports, evaluation and monitoring, replicating FSK approaches in other areas, and capacity building, or training. FSK sees four major reasons why the partnership with LWR has worked well: its flexibility in responding to FSK's changing program approaches (e.g. shifted from individual to group approach), its long-term focus (projects are funded for 3 years, and they are now in their 11th year of working together, the last 8 of which have involved funding), the range of support offered (e.g. including regular project support, bridging funds to cover needs between projects, and facilitation grants, which fund short-term emerging needs, such as curriculum development or emergency programming), and assisting FSK to source other partners (e.g. Canadian LWR). In comparison, FSK's other partners have been much more rigid and bureaucratic.

The partnership has not been without barriers, or challenges, as FSK prefers to think of them. For example, staff changes in LWR have made it necessary to re-build interpersonal relationships, funding is limited in that LWR gives small amounts and the three year period is too short for long-term results.

LWR has clear policy guidelines for funding local partners. It works in the areas of relief and rehabilitation, peace and reconciliation, marginalised groups, and environmentally sustainable activities. LWR has traditionally worked with local partners rather than operating its own programs. Its process for developing a partnership is well established: a partnership is typically initiated by the receipt of proposal document. LWR then discusses with the potential partner the issues raised, and the proposal is revised as per LWR guidelines. Other issues may emerge and they are addressed by the two parties, visits back and forth are common. Once the proposal is revised, it is presented to the regional, and then head office in New York. There, the Screening Committee reviews it. Changes are often requested, when the proposal is approved, formal contract agreement papers are drawn up. A disbursement rate and schedule are agreed on, along with reporting guidelines for financial and narrative reports. The whole process could take two plus years to establish this working relationship/partnership. But where immediate need arises Facilitation Fund or Seed Fund will be provided.

LWR sees its strengths as a partner in welcoming other donor-partners on board. They don't believe in the "ours or theirs syndrome". They also engage in regular discussions with partners as may be necessary so that they are aware of the progress of the projects. LWR brings partners together through workshops and other capacity-building activities so that they can learn from each other and discuss LWR partnership practices. LWR promotes self-reliance with its partners. In the end, LWR sums up its philosophy as one of teamwork. LWR and its partners all have resources to contribute. As the funding partner, LWR tries not to dominate, not to be an "unwanted guest" in its partners' houses. It can be stressful, but LWR aspires to the Luo saying, *'Wendo en gweth'* (a guest is a blessing).

Common Themes Partnership Principles, Practices and Action Strategies

Participants identified long lists of important principles, lessons, and challenges in each of the cases. Five common themes were prioritized as most important. Small groups of African and US participants discussed three topics for each theme: important principles and practices, barriers to effective partnership, and realistic action strategies. The highlights of their reports are summarized below. The five major themes included:

- (1) *Partnership Phases-Start Up, Operating and Weaning Off*
- (2) *Partnership Process-Communication*
- (3) *Strengthening the Capacity to Cooperate-US and African NGOs*
- (4) *NGO Financial Sustainability*
- (5) *Managing the External Environment*

Partnership Phase #1 Start-Up

The start-up phase was defined as interaction between the partners in the period leading up to the signing of a formal agreement. The partners may be either a PVO and a local NGO, or a PVO and the African stakeholders involved in spinning off a program into a new local NGO.

In the early phases of spin-off partnerships (BIMAS/PLAN and DevCentre/ World-learning), the focus tends to be on issues like crafting the partnership agreement, establishing identity and ownership, defining relationships, building confidence and trust, setting up structures and systems (property, infrastructure, recruiting and training), technical support and resource transfer. The traditional donor-recipient mentality has to be changed on both sides. Common frustrations concern new and as-yet undeveloped procedures, systems, and communication practices, delays in resource transfers, and difficulties in building trust. The African partner may feel vulnerable due to having only a single donor at this point, but this is offset by the high commitment usually felt by the US partner to the success of the spin-off.

Principle The existence of shared vision, mission, values and mutual objectives is the motivation for coming together as a partnership. Associated practices to determine the extent of shared goals include getting to understand one another, learning about each other's vision, mission, objectives, strategies, program activities, exchanging written documents about each other's organization, outlining capacities and competencies, follow-up meetings, seeking independent information about potential 'partners', including an environmental scan.

Barriers to determining the character of potential partners include inaccurate/misleading information, hidden agendas, potential for miscommunication/misunderstandings, absence of openness and frankness, cultural differences, lack of patience, lack of attention to detail, and the donor/recipient mentality (on both sides).

Costs to the partners include the potential to limit their independence, requires more time for decision-making, the potential for conflict is much higher, and they may discover that the partnership may not be sustainable.

Gains include the expansion of base of expertise, more effective use of resources, greater access to resources, and sustainable relationships.

Action Strategies Each party needs to be clear about its development vision and the type of partner it seeks. A written document, such as policy guidelines or a checklist, can be helpful. At the same time,

selecting partners is a process which may take some time. Prospective partners need to learn about each other, initiate relationships, and assess their mutual potential to work together.

- Develop guidelines for identifying partners. Look for track record, openness, and flexibility
- Understand partner's values, vision, mission and objectives--this requires patience
- Initiate contact and ensure that own values, vision, mission and objectives are clearly understood
- Engage in open and frank discussions between partners and with stakeholders
- Build a shared vision and a common basis for future agreement (including consultation with stakeholders)
- Agree on roles and responsibilities
- Detail respective expectations from partnership
- Verify legal implications of the partnership agreement
- Review draft agreement (understand the "small print" and "legal jargon")

Partnership Phase #2 Operating Phase

The operating phase can be defined as putting the partnership into practice. Operating phase begins once agreements are in place, with partner contributions identified, goals & objectives identified, and roles of the partners clarified. Typically, PVOs provide financial and technical assistance, while NGOs implement programs with communities and develop their own capacity. NGOs provide reports, financial and narrative, to PVOs at agreed-upon times and according to set guidelines. Funds are usually disbursed once reports are received and approved. There is a tendency in this phase for the burden to be on the NGO to live up to the PVO's standards. NGOs find little recourse when PVOs do not disburse funds on time or respond to emerging needs. Internal PVO policies and practices, such as rigid accounting procedures or staff turnover may hinder partnership agreements from being implemented smoothly. Partnership monitoring and evaluation typically focuses on program impact, there is a need to also monitor and evaluate the partnership itself.

The well-established partnerships (FSK/LWR and NACID/CRS) and the 'visionary partnership' (KCYDS/PIE) shared several common characteristics: greater flexibility founded on trust, regular dialogue, on-going support from the donor partner, long-term focus on sustainability, capacity building, diversified donor portfolio of NGOs, and practice of autonomy and independence. These partnerships demonstrate a shift in relationship from one-way demands for accountability from PVOs to well-developed systems that reflect good accountability practices and a culture of self-regulation. Challenges in these partnerships tend to concern staff turnover within the donor partner, large and bureaucratic systems, finding new partnerships.

Principles Several principles of the operating phase were identified:

- (1) That all parties take responsibility for the success of the partnership,
- (2) That all parties are mutually accountable and committed (bi-lateral process vs power relationship), e.g. in joint planning, problem solving, mutual respect, mutual trust, joint activities,
- (3) That parties share the authority to mutually bring about change, e.g. respond to each other's needs, monitoring and evaluation (how to make this a mutual responsibility), communication goes both ways (reporting is bi-lateral also),
- (4) Constantly work together to identify required resources,
- (5) Collaborative capacity building, e.g. systems, expertise, technology, programmatic,

- (6) Mutually monitoring the partnership and program, e.g. effectiveness of communication, effectiveness of systems, individually reflect, jointly reflect, schedule the days for reflection to monitor the partnership (and give it priority),
- (7) a partner does not enter into activities that undermine the other partner,
- (8) there is room for NGO partner to retain own identity,
- (9) the partners are accountable to the communities they serve (and stakeholders) in the use of funds/resources in the partnership, e.g. impact of services and management of operations/funds

Barriers to effective operational phases include inadequate resources, e.g. technological, human resources, and financial, existing biases, e.g. donor-recipient mentality, cultural, gender, previous lack of experience, e.g. in being good partners, in the region, and in the program area, information gaps and inadequacies, and personalities (can cause failures regardless of the "systems")

Gains include empowered NGOs, successful and more relevant programs, ability to leverage resources, expanded outreach, cost/benefit ratio improved (shared financial resources to cover more people), and development of network

Partnership Phase #3 Weaning Off Phase

The issues involved in this phase drew a lot of attention. Shrinking resources and changing funding criteria in the US have led to increased pressures to "phase out" or develop an "exit strategy". One PVO director said that phasing out was "*a hard issue to deal with, perhaps the hardest*". Many US PVOs don't want to encourage dependency of their partners, yet African NGOs operate in a context of great need and scarce resources. The potential end of partnership support is received uneasily on both sides. PVOs may not want to lose trusted partners. Many NGO programs have failed when support has been dropped with little warning or time for advance planning. Both parties find it difficult to discuss these issues openly, the conference provided an environment for exploring the issues from the perspective of both US PVOs and African NGOs. Emphasis was placed on the value of *gradual change*, with *mutually negotiated* shifts in responsibilities as objectives are attained. African NGO representatives used the term "weaning off" to describe this process.

"Weaning off" has a meaning in the East and Southern African context which differs from that in the US. Whereas North Americans and Europeans think of weaning as the process of encouraging a child to switch from breast feeding to bottled milk or solid food, in many African cultures it refers to the process of supporting grown children (adults) to establish their own households and become independent from (or interdependent with) the parents. Typically, there is much more interdependence of adult family members in African cultures than in the US.

Principles

- (1) Have a strategy for ending a funding relationship that is clear, negotiated and agreed upon by both parties,
- (2) Characteristics of effective weaning: gradual, flexible (both parties), and negotiated,
- (3) Consider how partnership can evolve, moving from PVOs providing finance to other forms of support, such as capacity-building, advice, dialogue. Time should not determine what partnership will do, rather, what the partnership will do should determine the time,
- (4) Weaning process should not happen in isolation (external and internal partnership processes affect weaning), PVO effectively builds NGO capacity to mobilize resources toward sustainability, e.g. human, financial, and material,
- (5) Recognition/application of the capability of NGO to develop/implement programs effectively,
- (6) NGOs feel empowered to implement programs interdependently

Barriers and Gains Developing an exit strategy means you all acknowledge you may lose a good partner (the challenge of "letting go"), Developing a new relationship is not easy, takes time, Gradual nature of exit strategy may be costly However, the failure to have an effective exit strategy can dramatically affect impact of programs, and the lack of exit strategy creates dependence for communities and NGOs

Action Strategies

- Build exit strategies into the initial partnership agreement
- Exit strategy should reflect not only funding reductions but also roles and responsibility definitions
- Exit strategy should include clear indicators to measure progress which are continually being monitored
- Exit strategy and partnership agreement should be flexible enough to learn from and adapt to changing realities (on the ground, external, etc)

Effective Partnering Process Communication

Many principles of effective partnering suggested by earlier research were found to be important, such as fostering mutual trust, behaving with openness and flexibility, building mutual understanding, frequent and meaningful dialogue, and mutual commitment The issue of communication was chosen as a particularly important barrier

Principle & practices Effective communication is essential to partnership, and includes both formal and informal communication Effective communication is frequent, consistent, candid, two-way, culturally sensitive, friendly/respectful, relevant, and involves all parties Two critical issues are culturally sensitive communication and relevant communication The principles of culturally sensitive communication include understand the value systems of the community in which you're working, partners understand each other's value systems, understand differences in communication styles, e.g American directness, oral vs written communication, written may carry much more weight than oral in some cultures, and oral may be more holistic/personal Different understandings may be overcome with time Written communication can support institutional memory, know when to use which The practice of hiring national staff by US PVOs who interact with local NGO staff significantly reduces cultural barriers in communication However, they may not have the management authority to make key decisions which could enhance partnerships

Given the time pressures on communicating, the group highlighted the most relevant kinds of communication revisiting the vision, goals, principles, objectives, discussing issues that relate to the above (things that matter), issues related to daily issues of managing activities, and issues related to building relationships

Barriers to effective communication include the often large size of the US PVO as compared to the local NGOs and the distance and technology gaps between the US and Africa Issues named included bureaucracy, distance (lack of physical proximity), unreliable, unavailable, or costly technology, people being absent due to job demands such as travel and attending meetings, technology gap between partners, mistrust, misunderstanding, skills gap, information gap, language differences, irrelevance of some communication, cultural differences, volume of work and performance pressures, different interests, lack of attentiveness, resource dependency, and bias

Action Strategies The group affirmed the need to consciously plan and carry out partnership communication strategies, even if they increase costs Without good communication, misunderstanding and 'bad will' can fester and detract from effectiveness Funds may be delayed or denied, emerging

needs ignored, or progress go unrecognized Inappropriate reporting procedures may place undue burdens on NGOs

- Clearly establish lines of communication e.g. who, when, how frequently, and by what means
- Clarify what needs to be written/formalized vs orally agreed to (and how soon)
- Build capacity into the partnership agreement e.g. buying equipment to fill technology gap, training to fill skills gap, and building costs for these into the budget
- Take time to really know each other by meeting regularly, making conscious effort to learn about each other's culture, informal gatherings If there is misunderstanding, ask/pursue! Regular, joint meetings
- Recognize that how one communicates may not be understood by those from another culture, ask "What does this mean?", "Is there a need to document this?" Learn to recognize *symptoms* of misinterpretation/miscommunication
- "Diagnose" and follow-up when there are such symptoms Plan (and budget for) regular, active learning on communication e.g. workshops, regular meetings, reflections, and active listening

Capacity to Cooperate International NGO (INGO)

Typically, capacity building is considered a need of Southern NGOs However, the presentations and discussions suggested that Northern and Southern agencies both need to develop policies, systems, and structures that support and enable cooperation Thus the distinctive aspects of the capacity to cooperate were discussed for northern and southern NGOs (the term, INGO, rather than PVO, was used to indicate that the principles apply to any international NGO operating in East and Southern Africa)

Principles INGOs should concentrate on the following four principles

- (1) *Power Equity* Partnership governance and resource management are fully negotiated and understood (without compromise to independence) between INGO and ANGO, and without (undue) influence from National Government,
- (2) *Management of Resources* INGO has flexibility to mobilize and disburse resources to the LNGO according to the mutually appreciated needs of target communities,
- (3) *Protecting Mutual Relationship* INGOs and ANGOs develop strong advocacy roles with their own governments to place their strategic community interests and needs at the heart of their partnership,
- (4) *Long-term Empowerment* INGOs and ANGOs concentrate on long-term capacity building which ensures that ANGOs/local communities take ultimate responsibility and leadership of development agenda in ANGO countries

Challenges to INGO capacity arise when Northern governments place their own strategic interests over interests of Southern governments, Northern governments see INGOs as agencies to implement own foreign policies, INGOs seem to play into the policy of their own government, and not fully advocate for their partnership

Gains include more flexibility of resource mobilization and usage, better response to communities' felt needs, value added to the resources currently transferred in ANGO countries, and shift of responsibility in decision-making in the use of resources and management

Action Strategies

- INGOs and ANGOs develop joint partnering framework that spells out mutual goals and values, guidelines and roles, procedures and processes that ensures equitable benefit to all stakeholders (Communities are the primary stakeholders),
- INGOs and ANGOs/Communities develop collective advocacy strategies to shift development paradigm to be more community focused, influence government thinking on local-global development issues, and allocate more resources and decision-making to "the people"

Capacity to Cooperate African NGOs

African NGOs can approach partnerships from an empowered position when they are driven by values and program needs, rather than the fear of not having funding

Principle and practices Partnerships will only work if there is a match in values between the NGO and the PVO African NGOs sometimes feel compelled to accept any source of funding, even if the match is not good For, example, if an African NGO values gender equity, if it engages with a PVO which is not gender sensitive, it will experience a lot of conflicts, making the partnership more costly and less productive African NGOs have choices of partners, even though resources are scarce Developing visions and missions which clearly communicate their values help NGOs to make choices about donor partners

Barriers, Costs and Gains It is difficult for NGOs to adhere to this principle when they lack clarity about values, do not have a clearly articulated vision and mission, feel themselves vulnerable because of inadequate resources ("beggars can't be choosers"), and do not have a track record yet that would enable them to choose partners The gains, however, outweigh the costs sticking to one's principle may prove costly in the short or mid-term, but in so often pays off in the long term By declining to engage certain partners on account of our principles, we may lose a funding partner, which may even put our organization at risk However, in the process, we win respect and build a reputation for ourselves, a situation which makes organizations attractive to a host of other partners

Action strategies

- Revisiting and clarifying values, vision, and mission
- Learning about the values of the potential partner and seeing how they relate to one's own
- Ascertaining whether the potential partner has a good track record from previous partnerships

NGO Financial Sustainability

The working group defined financial sustainability as the ability of an NGO to have control over its financial destiny, and serve its mission effectively

Key principles include entrepreneurial thinking, strategic thinking/planning, PVO/Donors acknowledge operating costs and encourage NGOs to have multiple donors, NGO will have multiple sources of funding and a balanced mix of funding, NGOs need to know their fixed and variable costs (i.e., what it costs to do business), NGO will operate cost effectively, and NGOs are aware and responsive to clients needs/wants

In practice, NGOs will have multiple sources of funding and a balanced mix of funding NGOs analyze their operating costs effectively and share that understanding with PVO/Donors, NGOs establish effective systems that facilitate response to PVO/Donor requirements, PVO/Donors are flexible and willing to work with other donors, and PVOs help NGOs build capacity in strategic financial planning and management

Common Barriers include NGOs lack understanding of their operating costs, NGOs lacking effective systems and capacity to meet PVO/donor requirements, NGOs lack entrepreneurial thinking, Pressing demands for NGOs to deal with different PVO/donor requirements, donor hesitance to have other donors support NGO ("donors" wanting to retain control), Lack of financial discipline or skills or different cultural norms, Cost of establishing the required level of systems and staffing for accounting, Cost of preparing proposals, networking to get multiple donors, Cost of building NGO capacity to meet the challenge of multiple PVO/donor resource base

Gains Independence from a single donor, ability to serve own mission, capacity to realize impact in line with mission, increased cost effectiveness, improved capacity for financial planning and management, capacity to be attractive to donor community, and sustainability

Action Strategies

- Conduct effective cost analysis
- Keep good financial records
- Educate PVO/donors on NGO's overhead costs
- Develop a network of potential donors
- Conduct needs assessment for capacity development in NGO
- Encourage NGOs to develop their own resource base
- Diversification of resources, e.g. selling services

Managing the External Environment

A number of actors and forces in the external environments of partnerships influence the effectiveness of the partnership, including governments, (external) donors, the social and economic environment, the policy environment, other NGOs, and the international development community. The working group chose to focus on managing the influence of national governments on PVO-NGO partnerships and the role of external donors.

Principles For effective partnership, there should be (1) High cooperation between partnership and host government, and (2) Flexibility of external donors in providing resources for the partnering process.

High cooperation between partnership and host government is achieved when relevant government departments are involved in the planning and execution of partnership projects, to convince governments, partnerships should show impact, frequent contact and exposure to NGOs' programs with government, and relevant government agencies become more flexible and accommodating to NGO partnership needs.

Barriers are many, and depend on the specific country. Although there are some similarities, Ethiopia, Kenya, and Malawi vary greatly in the ways their governments deal with PVO-NGO partnerships. Outstanding barriers include bureaucracy, lack of government understanding/appreciation of NGO work, lack of trust between NGO and government, government impression (sometimes justified) that NGOs are not open and/or abuse funds and/or unwilling to cooperate with government, some NGOs have questionable agendas, lack of NGO coordination to influence government policy (see each other as competitors rather than potential cooperators), PVOs' lack of understanding of local policy, culture and bureaucracy, unwillingness of government to allow bilateral organizations to work with NGOs, lack of effective communication between government and NGOs.

Gains, however, are worth the effort of developing cooperative relationships efficient implementation of partnership programs, government recognition of NGO work, development of trust and mutual understanding between government and partnership, attracting more external resources to support local NGOs in the country (creating a more welcome environment for PVOs and NGOs), and creation of long-term sustainability of NGO work

Action Strategies

- Establish effective communication between partnership and government, e.g. frequent meetings, government site visits
- Establish NGO network to influence government, PVO staff should understand local government policies and culture
- NGOs sticking to what they say they will do

Note on Donor Influence Some participants regretted that more time was not spent on the issues of managing the influence of external donors. Evidence from the cases suggests that the terms of donor funding significantly influence the effectiveness of the partnerships, whether from external sources such as bilateral agencies or foundations, or internal private sources in the PVOs

- Both partnerships committed to joint action learning about the partnership received funds explicitly designated to do so (PIE, PLAN)
- Restrictions on a local NGO in a well-established partnership stemmed from the external donor, not the PVO (CRS/NACID). The qualities of partnership in CRS/NACID are found in the extent to which the partners find ways to bring transparency and flexibility to the strict donor guidelines
- Both spin-offs are highly influenced by the terms of receiving funds and normal accountability procedures, whether they stem from external donors (World Learning/ DevCentre, or private sources (PLAN))

Although they are a small sample from which to generalize, these cases suggest two patterns: (1) partnership-oriented funders that provide relatively small amounts of funding and are responsive to NGO needs and interests (Banyan Tree/SCF-PIE/KCYDS and LWR/FSK), and (2) program-oriented funders that provide relatively large amounts of funding, but carry guidelines and restrictions that are perceived by African partners to involve some limits to their flexibility to become sustainable and respond to local development needs (USAID/ CRS/ NACID, USAID/World Learning/ DevCentre, PLAN/BIMAS)

Action Steps Strengthening the Participating Partnerships

The final day of the conference was devoted to integrating and applying the general principles, practices, and action strategies developed the day before to the participants' own partnerships. Meeting first as individual organizations and then as partnerships, the participants chose specific change goals and developed action plans for putting the changes into practice on return to their offices. Summarized below are the major action steps agreed to by each of the partnerships. They fall into five main categories: capacity building of the African NGO, developing a weaning off or exit strategy, developing indicators or a process for monitoring and evaluating the partnership (separate from the program), renegotiating the partnership, and strengthening mutual confidence and trust.

PLAN-BIMAS

- Capacity-building of BIMAS, e.g. FIS/MIS systems, purchase and transfer of assets, develop program methodology to increase outreach to poor women, add education
- Develop an exit strategy to insure BIMAS will be sustainable
- Build trust between PLAN and BIMAS

CRS-NACID

- NACID-CRS should devise and be ready to phase out the project
- Partnership should assess possible interventions in other sectoral or geographic (non food-secure) areas to continue with the partnership
- Participate actively in the NGO Network (CRDA) in order to initiate and influence policies which will enable NGO operation in the country

Save the Children US (PIE)-KCYDS

- Develop mutually agreed upon guidelines for reporting
- Establish indicators for monitoring and evaluating the partnership
- Fill the technology gap: additional phone lines for PIE office, photocopier and printer for KCYDS
- Develop indicators of when KCYDS is mature enough to move on (weaning phase) including the time-frame, and how to go about doing so
- Build the capacity of KCYDS to fundraise effectively (find donors and other creative strategies)

World Learning-DevCentre

- Register DevCentre as a Trust
- Conduct a successful launch of the DevCentre
- Complete Memorandum of Understanding between World Learning and DevCentre
- Strengthen mutual confidence between DevCentre and World Learning

LWR-FSK

- Increase impact on activities by extending length from 3 to 5 years
- Evaluate how the partnership is working, as distinct from the program
- Sensitize each other on weaning process
- Coordinate donors to reduce burden of reporting & strengthen NGO capacity to report

Impact and Follow-up from the Conference

Impact on Participants

Participants shared the following reflections on their experience of the conference

Learning from other partnerships and reflecting on one's own

- I am encouraged to know that other (partnerships) have challenges, too
- We realized that we too have gaps in our partnership, and that we can address them
- It was great to see the relative strengths and weaknesses of my partnership

- I enjoyed reflecting on our partnership, it has affirmed the direction we are taking and consequently it is motivating for me
- I have learned from how NGOs work in other countries

Partnership is much more than formal agreements and exchange of funds and reporting

- Partnership demands team spirit among PVO-NGO, two organizations working toward the same goal with different, complementary capacities
- Partnership needs the human element-not just the institutional arrangements
- We cannot be restricted by the contract or agreement-we must have an open mind within the partnership
- Partnerships can go beyond project and financial arrangements

Effective partnerships require a lot of effort and constant review

- This Conference was an eye-opener, effective partnership takes a great deal of preparation
- In order to have great results, it requires a lot of work
- Partnership requires careful planning and constant review
- We cannot take the partnership for granted-we must go on reviewing the partnership itself
- We can focus on the process of partnership as a product to work towards
- Partnership is fluid and, as such, change requires reviewing

Partnerships extend from communities to NGOs, PVOs, and donors

- Partnerships between PVO & NGO can reflect the partnership between the NGO and the communities
- Partnerships are going to be affected by donors

Future Steps

The IDR-MWENGO-GEM team will take several steps to finalize the case studies, prepare the summary report, and disseminate the findings to the wider development community interested in fostering effective partnerships. Specifically, the researcher team will

- Continue to solicit and incorporate partnership team feedback into the final versions of their case reports. Case reports are to be sent out to partnership teams by the end of March 31, 1999, and the finished product completed by June 1, 1999
- Develop a draft Case Conference Report and solicit feedback from the partnerships prior to a wider dissemination by March 31, 1999. The final Case Conference Report is to be completed by June 1, 1999
- Disseminate the Report via the existing networks of IDR, MWENGO, and GEM as well as through internal PVO/NGO partnership channels

Participants requested a follow-up conference to see how the action plans have worked out and to discuss some of the other pressing issues. MWENGO, with support from IDR and GEM, will take the lead in conceptualizing and exploring the possibility of a follow-up conference. This might take place in a year or so and may include participants from this conference as well as from other partnerships. Emphasis would be on continued learning from one another and the further development of strategies for effectively fostering and implementing partnerships between Northern and Southern NGOs.

References

International Forum on Capacity Building (IFCB) (1998) Southern NGO Capacity-Building Issues and Priorities A Synthesis of Consultations and Surveys with Southern NGOs, Northern NGOs, and Donor Institutions Prepared by Secretariat of Interim Steering Committee, Society for Participatory Research in Asia (PRIA), New Delhi, India

Leach, M , Kalegaonkar, A , & Brown, L D (1998) PVO Perceptions of Their Cooperation with NGOs Draft Report Institute for Development Research, Boston, MA USA