



# **PARTNERSHIP POLICY**

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# PWRDF PARTNERSHIP POLICY

## INTRODUCTION

“To look outward is to acknowledge that the horizons of God are broad and wide... When we reach out, it is to try and grasp God’s leading and direction as well as to offer our own gifts and talents to others who may need them. Reaching out has a twofold meaning. It suggests both giving and receiving. We offer what we have and know, and we receive what we need and seek.”

**Archbishop Michael Peers**

Creating an updated Partnership Policy was identified as a priority by the PWRDF Board at its April 2002 meeting. Subsequently, the goal of having an approved policy by May 2004 was established. This will keep PWRDF in compliance with our commitments to Partnership as a member of the Canadian Council for International Cooperation (CCIC). A Partnership Task Group (PTG) was created, and in its discussions affirmed that partnership is both a “value” and a “model for work”. The PTG agreed that an updated policy should provide greater clarity about this “model for work”, which would then enable the development of “management guidelines”.

The following document sets out PWRa Biblical Vision for partnership. This Vision of PWRDF is further elaborated through the Principles and Definitions that we understand guide our partnership relationships. The Partnership Policy itself seeks to address the “models for work” that will govern the life of those partnership relationships. Finally some comments about board and staff Roles and Responsibilities are also included along with some Background information.

## BIBLICAL VISION

Contributed by Rev. Gavin Rumsey

Biblical faith is grounded in COVENANT. The God of the Hebrew faith establishes a covenant with God’s people: *“They will be my people and I will be their God”* (Jeremiah 32:38). At its highest expression this vision of covenant partnership is seen to embrace the whole human family and the whole creation.

*“When the rainbow is in the clouds, I will see it and remember the everlasting covenant between God and every living creature of all flesh that is on the earth.” God said to Noah, “This is the sign of the covenant that I have established between me and all flesh that is on the earth.” Genesis 9:9*

The early Christian communities believed that Jesus the Christ – Risen and Glorified – renewed the covenant partnership. This “New” Covenant (Gospel) is meant to be proclaimed to all the world. It is a covenant of reconciliation based in justice and peace.

Jesus stood up to read, and the scroll of the prophet Isaiah was given to him. He unrolled the scroll and found the place where it was written:

*“The Spirit of the Lord is upon me,  
because he has anointed me to bring good news to the poor.  
He has sent me to proclaim release to the captives  
and recovery of sight to the blind,  
to let the oppressed go free,  
to proclaim the year of the Lord’s favour.” Luke 4:18-19*

*So if anyone is in Christ, there is a new creation: everything old has passed away; see, everything has become new! All this is from God, who reconciled us to himself through Christ, and has given us the ministry of reconciliation.  
2 Corinthians 5: 17-18*

The Anglican Communion has received the reconciling word of covenant partnership in the tradition of the Christian faith. In its relationships with partners and with God, PWRDF incarnates this covenant partnership in programs of relief and development. The fundamental message (Gospel) of programs “on the ground” is to “embody” reconciliation, justice and peace through committed partnerships.

*We witness... by being a community of reconciliation, a forgiving community of the forgiven. Archbishop Desmond Tutu*

## **PRINCIPLES**

PWRDF’s partnership policy is governed by the following principles:

- 1. Shared Values:** Partnerships should be built on shared values, visions and goals for society that imply mutual support and solidarity beyond the implementation of specific programs and projects. (Adapted from CCIC Partnership Principles 2.3c);
- 2. Equity:** Partnerships should be founded on principles of equity; acknowledging that inequities often exist as a result of power dynamics, especially in situations of funding relationships, partners should recognize the many elements of mutual responsibility and accountability that would engender a more equitable partnership (Adapted from CCIC 2.3.d);
- 3. Accountability and Responsibility:** Partnership demands consensus between partners in regard to goals and objectives, criteria, evaluation and commitment to seeing projects to completion. Partnerships are not unilaterally terminated, but are phased-out based on previously agreed guidelines. (PWRDF Guidelines of Partnerships and Funding)
- 4. Autonomy and Mutuality:** Partner organizations should respect one another’s autonomy and constraints and strive to foster a climate of mutual trust in all their partnership activities (CCIC 2.3g). Mutuality is underscored by a deep sense respect for, and trust between partners. In decision-making, mutuality means sharing power. For example, major decisions affecting partners should not be taken

without their participation in the decision whether by their presence when it is made, or by prior consultation (Anglican Principles of Partnership).

- 5. Communication and Transparency:** Based on relationships of trust, partners shall strive to deepen their understanding of one another through the regular and transparent sharing of information. The activities of all parties shall be open and accessible to scrutiny by the other parties, respecting individuals' rights to privacy. (Adapted from (CCIC 3.6.2d);
- 6. Cultural Inclusiveness:** International relationships involve the encountering of cultural differences. These differences can create problems in partnerships but also provide an opportunity for mutual challenge in order to recognize and build on each other's strengths. There must be a willingness to understand each other's perspective, and to seek an ongoing dialogue that enables progress in the partnership. (adapted from PWRDF Guidelines on Partnerships and Funding)
- 7. Transformation:** Partnership needs to include openness to transformation by the partners involved in the relationship. This requires flexibility and adaptability of institutions (both North and South) in changing social, economic, and political contexts (from Brazil Partnerships discussion).
- 8. Solidarity:** We are part of each other. We are committed to one another in Christ's body. What touches one member touches the others. Thus, no one must be left to suffer alone (Anglican Principles of Partnership). Partnership therefore calls us to stand in solidarity with all people, particularly with the poor and the oppressed, and to challenge the value systems of this world (adapted from WCC Guidelines for Sharing, El-Escorial).

## DEFINITIONS

Based on the principles articulated in this policy document, as well as previously developed understandings of partnership (see Appendix 1: Background), PWRDF understands partnership to be defined in the following way (note that the elements for partnership identified constitute a comprehensive list, not all of which will apply to every partnership):

- 1. Development Partnership:** A partnership is one that involves mutually agreed upon goals and a high degree of reciprocity. The partnership is agreed to by both PWRDF and an overseas organization or church. A partnership is characterized by a number of elements, such as:
  - ◆ shared values and concerns, both joys and sorrows;
  - ◆ the possibility of bringing transformation to each partner;
  - ◆ a commitment to mutual growth;
  - ◆ the financial component of the relationship not being a central feature;
  - ◆ a built in mechanism for preventing dependency in order to deal with issues of power imbalance and resentment;
  - ◆ a process of sharing not only what we have but what we are;

- ◆ a process of mutual accountability;
- ◆ an expectation that there would develop through the partnership an enhanced capacity to continue more effectively with the work;
- ◆ an education component designed to facilitate solidarity within the partnership and strengthen the relationship;
- ◆ the connection of people to people;
- ◆ the possibility to address short term project funding needs that are over and above the usual program grant.
- ◆ a mechanism for evaluating, and, when appropriate, phasing out the partnership.

#### Preamble

The following Partnership Policy seeks to live out the PWRDF vision of “communities fully restored”, as well as the Biblical Vision, Principles and Definitions contained in this document. It should be noted that the “model for work” that will govern our partnerships will be further elaborated in an implementation plan that will include elements in line with the PWRDF Board’s fiduciary responsibilities, letters patent and other governance documents, as required by law. The implementation plan will be developed following approval of this policy.

#### PARTNERSHIP POLICY

### **DEVELOPMENT PARTNERSHIPS**

#### **1. Identifying Potential Partners**

- a. Board approval will be sought when PWRDF plans to enter into a partnership in a country or region where work has previously not taken place or where work is being reinitiated. Staff will provide a contextual and programmatic rationale for board approval. As well, a mandate to staff to explore specific potential partnerships will be requested. (See also roles and responsibilities)

#### **2. Initiating a Partnership**

- a. Partnership relationships, whether they include a funding component or not, must be consistent with the vision, mission statement and strategic themes of PWRDF, and with the principles and vision articulated above.
- b. Programs and projects funded by PWRDF must fall within PWRDF priorities in terms of country and program as determined in the strategic planning process, or there must be a compelling reason why an exceptional grant would be made. (PWRDF Guidelines on Partnerships and Funding)
- c. Within PWRDF priorities, criteria for funding will include the following:
  - A special emphasis on partners, that is consistent with PWRDF’s inclusion principles such as, women, indigenous peoples, youth, vulnerable groups, and whole communities;
  - The context is one in which there are significant social and economic justice, human rights or environmental concerns;

- Is a response to calls for support by partners, local civil society, and/or ecumenical organizations, even though the media may have lost interest;
- There is sufficient compelling evidence that support is needed and there is potential both on PWRDF's part and the part of partners, to make a difference;
- There is potential to develop strategic links to PWRDF through ecumenical networks, national and international forums (be they ecumenical or secular), and denominational relationships;
- There is potential opportunity to become engaged in public policy dialogue and in raising public awareness.

### **3. Maintaining a Partnership**

- a. PWRDF partnerships will be maintained based on Management Guidelines that will include the following:
- Memorandums of Understanding:
    - 1- that spell out mutual goals,
    - 2- that specify timelines for periodic evaluation and lessons learned processes, during which the future of the partnership will be reviewed to determine whether or not to continue with the partnership;
  - Funding agreements with clearly stated timelines and adequate criteria for mutually agreed upon reporting requirements to ensure that all parties use development funds as agreed;
  - Criteria for maintaining the partnerships with or without funding, including mutually agreed upon acceptable organizational practices;
  - Clarity about the life of the funded program which may or may not coincide with the life of the relationship;
    - Identified processes for resolving fundamental differences in the partnership;
    - Processes and criteria for ending partnerships.

(Adapted from PTG Report to Board, September 2002; CCIC 3.6.2b.)

### **4. Ending a Partnership**

- a. Partnerships that have a financial component to them will be contractual in nature and will have an "ending" written into the financial obligation. However the relational aspect of the partnership can continue indefinitely or realistically, so long as it is mutually beneficial;
- b. The final phase of the programme or project needs to build into it disengagement strategies according to the context, needs and capabilities of each partner. (as above)

## ROLES AND RESPONSIBILITIES

### Board:

- a. Through the Strategic Plan the board will define the Development Program framework, based on staff input. The Strategic Plan will include the identification of potential program and partnership shifts and will address both the initiation and the ending of programs/partnerships;
- b. Periodic assessment and evaluation processes, facilitated by staff, could include visits by board members to partners, participation in partnership roundtable discussions (ie: The Brazil Roundtable), and other expressions of solidarity and mutual learning.

### Staff:

- a. Overall management of the partnership relationship from it's inception to it's ending;
- b. Acts as a resource to the board by providing information, periodic reports and analysis on programs/partnerships, and by facilitating any periodic assessment and evaluation processes.

## APPENDIX 1: BACKGROUND

The following review and summary of World Council of Churches, Anglican Church and PWRDF policy is an attempt to provide a background for our understanding of partnerships so that the final result reflects our history and experience and is rooted in the ongoing life of the PWRDF community.

**PWRDF** received a **General Synod Mandate** in 1973 that highlighted an understanding of partnerships that went beyond the Church:

“In addition to emergency relief, rehabilitation and refugee support, the Primates’ Word Relief and Development Fund gives priority to those projects and processes that relate to development, self-determination, liberation and a total sharing of resources, even though they may not relate to the Church’s own immediate welfare or to those kinds of institutions or structures to which we have become accustomed.”

In 1987 the World Council of Churches convened the “Consultation on Koinonia: Sharing Life in a World Community” in El Escorial, Spain. Representatives of PWRDF and Partnerships were present at this important ecumenical gathering. Out of that consultation came a “covenant text” of **Guidelines for Sharing** that committed the participating churches:

“To a new understanding of sharing in which those who have been marginalized by reason of sex, age, economic and political condition, ethnic origin and disability, and those who are homeless, refugees, asylum-seekers and migrants take their place at the centre of all decisions and actions as equal partners.”

The covenant text goes on to outline the means by which this “new understanding of sharing” will be implemented ecumenically, including:

- “working towards the kind of self-reliance and self-determination which are an essential condition of interdependence”;
- “keeping one another informed of all plans and programs and submitting ourselves to mutual accountability and correction”;
- acknowledging that “there are no absolute donors, nor absolute recipients, but all have needs to be met and gifts to give, and to work for the structural changes in the institutions in the North and the South which this calls for”;
- “shifting the power to set priorities and terms for the use of resources to those who are wrongfully denied both the resources and the power...”

In February 1993, “Ten Principles of Partnership” were developed by the **Mission Issues and Strategy Group (MISAG)** to form an understanding of partnership within the **Anglican Communion**. The Ten Principles identified were: local initiative, mutuality, responsible stewardship, interdependence, cross-fertilization, integrity, transparency, solidarity, meeting together and acting ecumenically.

The Ten Principles reflected the ecumenical commitments made at the WCC convened El Escorial meeting, and “the Lambeth call for Anglicans to explore ways of being involved in mission cooperatively with other Christians.”

With respect to “mutuality” the document states:

“In decision-making, mutuality means sharing power. For example, major decisions affecting partners in the South should not be taken without their participation in the decision whether by their presence when it is made or by prior consultation.”

“Responsible stewardship in partnership” was defined as “partners [who] see their resources as jointly owned and held in trust by each member for the common good.”

In 1998, **PWRDF** developed **Guidelines on Partnership and Funding** that built on the principles contained in the three documents noted above, and on the Development Principles of the Code of Ethics of the Canadian Council for International Cooperation. Principles related to mutuality, cultural issues, communication and transparency, and accountability and responsibility formed part of the PWRDF Guidelines, elements of which have been integrated into this current policy document. In addition to these principles, the document states that,

“PWRDF is committed to a process with each implementing partner that clarifies to each other’s mutual satisfaction:

- the nature of the relationship
- the shared values;
- the mutually agreed goals
- the role that both PWRDF and the implementing organization will play;
- the timelines of the relationship;
- a plan to review and evaluate the relationship.”

**Current Context**

As noted in the introduction, the Partnership Task Group finds much in these background documents that speaks to partnership relationships as a “value”. What is now needed is a policy that builds on the commitments stated immediately above (“a process with each implementing partner...”) that will govern our partnership relationships as a “model for work”.

The implementation of this policy will therefore require the elaboration of Management Guidelines, some elements of which exist and some of which (i.e. Memorandums of Understanding and criteria for maintaining partnerships) require elaboration.