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**A Partners' Consultation:
*Reengineering Relationships***

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A PARTNERS' CONSULTATION: REENGINEERING RELATIONSHIPS

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Introduction:

How can an ensemble sound like an orchestra and not a cacophony? While there are interrelated explanations, from the skill of the performers to hours of practice, a great deal has to do with the understanding the performers have that they are there to engage in a common effort that gives each an opportunity to perform in an overarching atmosphere of support and mutual purpose, and how they organize themselves to achieve this purpose. We believe the concept of "orchestration" as different from "coordinate," "managed" or "direct" best describes the approach that transformed a traditional USAID/ Manila Annual Conference with its non-governmental organizations (NGO) grantees into an incredibly exciting partner consultation. In the process, we and our partners learned a lot not only from each other but how better to work with each other. We would like to share some of these lessons with you.

Background:

Traditionally USAID/ Manila's Office of Voluntary Cooperation (OVC) held an annual conference with its substantial number of NGO grantees. The conference agenda was planned by USAID and largely designed to review the status of activities over the past year. It focused on discussing major lessons learned from those activities;

and on updating people on new USAID procedures and policies. The majority of the conference was conducted in the form of presentations from a speakers table; followed by questions and answers. It was generally appreciated and effective as a means of USAID communication to others.

The Reengineering Context:

The Agency's reengineering initiative had immediate effects on USAID/ Manila and its Office of Voluntary Cooperation. First, there was the clear new mandate for a reorientation from patron-client to partnership between USAID and the NGO community. Second, USAID/ Manila was appointed as one of a few reengineering labs (CELs) that were given a specific mandate for experimentation. Third, programmatic reengineering had resulted in the determination that the existing OVC program was to be transformed into a more focused democracy initiative that would focus on targeted support to coalitions of common purpose groups rather than individual organizational efforts. (Reflected in the office reorganization as the Office of Governance and Participation [OGP].)

The Agency's new emphasis on participation and customer focus meant the old USAID' management style was deemed inappropriate. The appointment of the Mission as a CEL

psychologically empowered the conference organizing team towards maximum creativity and innovation, and emboldened them for risk taking. The new programmatic directions meant the new orientation was meant to maximize listening to partners, while still effectively communicating USAID's own new understandings and realities.

Two other additional factors need mention. One was the announcement by USAID/W of the idea of a planned "New Partner Initiative" (NPI) between the Agency and the NGO community. The second was the new Agency mandate on developing measurable results oriented activities with clearly defined objectives and indicators. This mandate is consistent with the reengineering core value of managing for results.

Redesigning Relationships:

In response to the above needs, a series of very conscious decisions was made. First, the conference was reformulated as a "partners consultation." Second, it was given a clear overarching theme of "Coalitions and Civil Society." (This served to both focus discussions and to impart a spirit of common purpose among attendees that reverberated through the three day gathering.) Third, it was decided that the majority of the meeting should be in the hands of USAID partners not USAID itself. (i.e. voluntary partner facilitators were put in charge of leading the majority of the activities.) Fourth, it was decided to avoid a sense of hierarchy and to create an atmosphere of dynamic

movement of people and ideas. Fifth, it was decided that there should be a broad mix of participants representing a wide social, ideological and functional spectrum; and including new faces as well as present partners. Lastly, it was decided that the Mission had the explicit Agency support to "run with the new ideas of NPI" and "an indicator measurable, results-oriented program."

Theory into Reality:

A. A New Partnership with Clients

1. Diversity of Participants

110 representatives from about 79 civil society organizations (CSOs), local and national government agencies, and 4 foreign donor organizations attended the 3-day conference. As a result, there was created a mix of top government officials, key non-government organization (NGO) leaders, individual thinkers, and real customers from the disadvantaged sectors.

The representation from government included two cabinet secretaries, two undersecretaries, the presidential advisor for Mindanao, and a progressive governor, who is concurrently head of the League of Provinces. The NGO participants included both individuals acknowledged to be "grandfathers and grandmothers" in the community, (being pioneers among their peers as well as prime movers and shakers) and a new generation of emerging leaders. The conscious effort to invite a wide

spectrum of CSOs was successful. Participating CSOs included those with and without past and current involvement with USAID. The foreign donors included Ford Foundation, Canadian International Development Agency, United Nations Development Program, and AusAid. (The ADB, JICA and World Bank were invited but were unable to attend.)

Though organized by the new Mission's Civil Society Result Package (RP) team, there was broad representation from the entire USAID Mission in Manila. This allowed a comprehensive dialogue with our partners concerning all of USAID new strategic objectives (SO), not just our democracy agenda. The concept of a New Partnership Initiative was extensively discussed and received strong interest from the participants. A Management Systems International (MSI) study team (funded by the Global Bureau) working on democracy indicators also partook in the conference. The study team made a preliminary presentation of the proposed AID Democracy indicators and substantially interacted with our partners.

Most importantly, there was significant representation from peoples' organizations (POs), particularly from the urban poor, marginalized fisherfolk and indigenous peoples (USAID's three initial customers from the disadvantaged sectors). Inviting the POs had been seen as an unusually risky venture, untried in previous USAID conferences. However, like most risky

ventures, when they do succeed, the pay off was very high. The POs spoke for themselves and directly addressed tough questions to the government officials. The questions zeroed on inconsistencies between government policy and action. During the Q&A sessions the government officials spoke directly from the floor rather than the podium. They themselves quickly picked up the spirit of true dialogue and were neither defensive nor authoritarian. For the very first time, it was explicitly stated that the paramount concern was effective honest communication and therefore, (as decided by each speaker) the local language (Pilipino) as well as English was used as the lingua franca of the conference, further lending a more free and natural interchange of ideas.

2. Customer-focused Conference

In furtherance of the decision to reformulate the conference, the consultation sessions focused on issues most relevant to our partners and customers. Development substance rather than donor process was stressed. The new agenda was designed to allow for various focused group discussions on generic issues most relevant to coalition building and civil society, such as consensus building; posturing vs. lobbying vs. advocacy; preserving a coalitions' cause; the challenges of coalitions and partisan politics; how and whether to sustain coalitions etc. It was left to the participants themselves to give these concerns concrete form in terms of their immediate issues and

action priorities.

To reinforce the concept of the New Partnership Initiative (a relationship between equals), numerous habits and traditions from past meetings were abandoned. A presidential table on the stage was replaced by a small round table on a much lower dais. All individuals were labelled participants in the conference materials, rather than resource persons, guests, participants or observers. USAID did not monopolize the facilitation nor rigorously structure the small group discussions. Since volunteers from among the participants were the facilitators and activity leaders there was created a true sense of ownership of the meeting.

One of the most interesting phenomenon (upsetting to some) was the use of round rather than long tables of eight to ten people, dispersed around the room with no obvious center. This resulted in substantial movement between groups and side conversations. As a result, substantial new networking spontaneously occurred. Some found this distracting. However, this actually resulted in some immediate small victories.

To wit, the various groups working with different indigenous tribes were able to connect with each other and plan on future collaborative activities. The marginalized fisherfolk coalition was able to secure a side meeting with the Secretary of the GOP Department of Environment and Natural Resource and thereby brought the

fisherfolk coalition to the forefront of the GOP decision makers' awareness. Two major federations of fisherfolk and a key advocacy NGO were able to come together and openly discuss the issues that affect their members. Three groups were able to agree on a single position with regards to the three basic priority issues affecting the fisherfolk sector. (The establish of direct contact with the environment secretary opened other doors for them to further participate in the public policy arena.)

The relatively new Secretary General of the Housing and Urban Development Coordinating Council (HUDCC) was also able to meet and discuss openly with an urban poor coalition for the first time. (This initial meeting resulted in a concrete agreement to immediately "challenge" each others' full cooperation in a pilot activity in an agreed upon poor area in Metro Manila.)

The overall interaction between and among USAID staff and the participants was also extremely open and culminated in a most effective two-hour customer feedback session on the last day of the Conference. The participants raised some very valid issues and bold comments on USAID's strategic objectives, business operations, and future directions.

B. Creating Synergies

Apart from the natural synergy which emanated from bringing various CSOs working in common areas together in one forum, the conference also created synergy within USAID's

SOs and with other donors' programs. With sufficient mission representation, the audience of 110 participants was able to benefit from an increased knowledge of the mission's SOs in environment, population and health, and economic development; and to better understand their interrelationships. The New Partners Initiative as well as other themes such as reengineering was also prominently discussed. The consistency between our democracy strategy and the Government of the Philippines' (GOP) social reform agenda (SRA) was made very evident during the discussions, led by a dynamic presentation on the SRA by the Secretary of the Department of Social Welfare and Development (DSWD) and the Secretary General of the Social Reform Council.

A new spirit of collaboration was one of the immediate gains of the conference. One clear and direct result of the conference was the opening of potential extensive collaboration between our environment SO and the indigenous peoples and fisherfolk coalitions. Within our environment SO, USAID has significant activities in community forestry and the uplands and in coastal resources management, that directly affect members of both these groups.

The Ford Foundation, apart from our already existing collaboration in local government, is also now interacting with the Mission with respect to our indigenous peoples grant. Through useful leads from the AustralianAid, we were able to connect

with some Australian groups and federal agencies involved in the aboriginal peoples movements. Their experience and learnings have much use and potential application in our current activity for Philippine indigenous peoples.

C. Launching of Results Package (RP) for the Disadvantaged

USAID/ Manila's Democracy SO is defined as **broadened participation in the formulation and implementation of public policies in selected areas**. The achievement of this SO requires parallel results in both local government (RP1) and civil society (RP2). The conference launched broadened participation for the disadvantaged as a fundamental results package (RP) within the Democracy SO. A clear definition of our new democracy strategy was particularly needed in light of the fifteen-year history of the PVO CoFinancing Program. As communicated to the 110 CSOs and donor representatives, our civil society RP to enable disadvantaged groups to coalesce and participate in the public policy arena was positively received and endorsed.

D. New Understandings of Coalition Building Processes

The consultation helped clarify everyone's understanding of a "coalition" as differentiated from other civil groups, such as networks or

federations. A coalition was defined as the coming together of diverse groups who share a very defined, discrete, practical objective. It was clarified that the institutionalization of the coalition is not necessarily the primary, basic interest. This does not mean that its institutionalization may not be important or necessary. However, for the purposes at hand the emphasis is on forging a united effort to achieve one or more clearly delineated major objectives. Also, emphasized was that for coalitions of disadvantaged groups, the coalitions must be not just be for them, but with and ultimately, of them.

Many attendees expressed the opinion that the conference itself exemplified this -- with USAID playing the critical role as host of a common forum effectively designed to forge new relationship and understanding between groups who beneath their diversity share fundamental values and objectives.

E. Replication Consultations

An important unexpected result of the partners consultation was the establishment of a new model of partner consultation and coalitions with apparent great appeal. Since the consultation, two of the attendee organizations held "echo" events where, with similar themes and methods, they had major consultations with diverse groups within their regions on coalition building and new models of cooperation.

The consultation outcomes are

available in separate documents. A synopsis of these consultation documents is as follows:

Module 1: Coalitions: Their Coming of Age

A. Coalition Building and Civil Society in the context of USAID Priorities

The past relationship as well as prospects for a continued partnership between USAID and civil society organizations was discussed, particularly in the context of USAID/Manila's Democracy Agenda. Highlights of USAID's reengineering efforts and New Partners Initiative were noted. This session concluded with a comprehensive analysis of coalition-building from USAID's perspective.

B. Issues and Lessons Learned in Building Coalitions

The group discussions focused on issues and lessons learned in building coalitions centered on three topics, namely: consensus building, getting at effective advocacy, and preserving the coalition's cause. This section contains the presentation of the three workshop groups and the key points raised by the participants during the plenary.

C. Issues and Lessons Learned in Making Coalitions Work

The group discussions on issues and lessons learned in making

coalitions work centered on three topics, namely: communicating your message, NGOs in politics, and sustaining the coalition. This section contains the presentation of the three workshop groups and the key points raised by the participants during the plenary. Also included was a presentation by a noted NGO leader on strengthening coalitions, and guidelines on building sustainable coalitions culled from the experiences of the Agribusiness System Assistance Program (ASAP) of USAID.

D. Specific Issues and Challenges

Four workshop groups tackled specific issues and concerns relevant to indigenous peoples, marginalized fisherfolk, urban poor, and coalitions with business, respectively; organized around the presentation of the four group leaders and the reaction of the participants during the plenary.

E. Measuring Success

This section contains the presentation of Mr. Lawrence Heilman (and Mr. Richard Gaeta), a USAID/ Global consultant from Management System International, on the initial list of indicators for measuring progress in building coalitions and the feedback of the participants.

Module 2: Dialogue with Government

A. Keynote Speech of Secretary Victor O. Ramos

In his keynote speech, Secretary

Victor O. Ramos of the Department of Environment and Natural Resources shared how civil society organizations and government have collaborated to successfully shape many policies of national government. He specifically called for the recognition of indigenous peoples' rights, and, during the open forum, numerous policies on aquatic, forestry and industrial issues were discussed.

B. GOP Panel Presentation on Coalition-Building

Secretary Lina Laigo of the Department of Social Welfare and Development and Secretary General Patricia Lontok of the Social Reform Council outlined the government's Social Reform Agenda and discussed the relevance of coalition building to it. Governor Roberto Pagdanganan talked about coalition building from the point of view of local governance. An open forum immediately followed the presentations.

C. Social Equity Vis-a-vis Economic Growth in Mindanao

Mr. Paul Dominguez, Presidential Advisor for Mindanao, outlined the government's key development strategies to promote economic growth and social equity in Mindanao. He identified key development issues and called for deeper involvement from the private sector. (This module also contains the key points and issues raised by the participants in response to his presentation.)

Module 3: Networking and Consultations

A. Specific Opportunities: Linkage with Other USAID Offices, Donor Agencies and the Business Sector

This provides a compendium of the presentations given by panelists from other USAID offices; and representatives of the Ford Foundation, the Canada International Development Agency, the Philippine Australian Community Assistance Program, and the business sector. The purpose of these presentations was to identify potential areas for synergy and cooperation. The key points raised during the open forum are included.

B. International Connectivities

Mr. Horacio Morales of the Philippine Rural Reconstruction Movement discussed the importance of global networking among coalitions of civil society organizations and gave illustrative examples of how diverse networks from different countries had coalesced and successfully influenced major policy decisions of global agencies like the United Nations and the World Bank. (Feedback from the participants is included.)

C. Client Consultations

This module contains feedback provided by the participants in the areas of: future conferences, USAID policies and program directions, networking, operational/implementation matters, and

the conduct of meetings.

Summation:

USAID's new partner initiative calls for a fundamental realignment between AID and the NGO/CSO community where common purpose, joint effort and consensus define the essence of the relationship. Reengineering advocates for teamwork, empowerment and accountability, results, and customer focus. USAID Philippines specifically made an effort to put these to the test this year in its Partners Conference on Coalitions and Civil Society. The results judged from both our own perspective and partner feedback, proved outstanding.

Historically, the USAID/Philippines Office of Voluntary and Cooperation (OVC) held an annual meeting with non-government organizations (NGOs), primarily inviting those with existing projects co-financed with USAID. This year its new Office of Governance and Participation (OGP) in response to organizational and programmatic reengineering, instituted substantial change in the meeting's character in tandem with the participants.

The meeting, held on October 13-16, 1995 in Davao City, Mindanao, was renamed Annual Partners' Conference. The new direction of the conference was emboldened by the Agency's reinforced emphasis on participation and customer focus. Reengineering allowed the Mission room for creativity

and innovation, in taking risks that can and do pay off and resulted in a far more client-oriented partnership and co-ownership.

If there was any one overriding conclusion it was that taking the chance of moving from an unequal to a more equitable partnership relation is worth the risk. We recommend it to others.