



ERFA Partnership Principles

Details

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ERFA Partnership Principles

ERFA's vision is for access to quality education and life-long learning opportunities for all, supporting empowered communities who determine their own futures.

Partnership types and philosophy

Through implementing Partners, ERFA works together with communities, supporting them to recognise their strengths and create solutions for what they have identified as their biggest needs. In this way, communities partner in locally-owned projects that promote continuous improvement, wellbeing and sustainable outcomes.

To enable our work, ERFA partners with Australian supporters whose attitudes and beliefs align with our values of presence, compassion and liberation. ERFA seeks to develop opportunities for deep engagement and connection between donors and partner projects.

ERFA recognises that the root causes and impacts of poverty and the drivers of marginalisation are substantial and complex. ERFA believes that it is only through collaboration with a wide range of actors with complementary skill sets, resources and a shared vision, that the Sustainable Development Goals can be achieved.

In maintaining relationships with a diversity of stakeholders, ERFA strives to build partnerships which:

- align with ERFA's vision and values;
- enable mutual and complementary contribution to shared goals and learnings;
- are based on integrity and transparency and are genuinely collaborative and respectful of each partners' skills, strengths and responsibilities;
- ensure effective use of resources and sustainable outcomes for communities.

Implementing partnerships

As a development organisation ERFA aims to achieve Project impacts by working in close cooperation with implementing Partners. This involves ERFA distilling principles of best practice and sharing learnings with its implementing Partners. It also involves ensuring sound risk management and policy compliance through structured monitoring. ERFA engages in actively listening to and soliciting feedback from its implementing Partners to develop its own principles of best practice and to pursue development activity that is tailored to a community's unique circumstances.

ERFA is conscious that many of its relationships are characterised by a power imbalance. This is especially true for implementing partners of the overseas Projects that ERFA funds. Overseas, ERFA operates exclusively in low-income or 'developing' countries. Due to its background, the majority of ERFA's overseas implementing partners are Edmund Rice entities. However, ERFA recognises the importance of partnering with a diversity of organisations in order to achieve its own goals and the goals of the communities in which it operates.

The power imbalance is also true for the domestic projects that ERFA partners with. The Beneficiaries that ERFA supports in Australia include vulnerable children and youth who typically come from a background of economic and social disadvantage: this includes, refugee students, students with a disability and students enrolled in flexible education.

Due to the inherent power imbalance in ERFA partnerships, ERFA manages the potential risk that relationships with its Partners could become one-sided and didactic rather than collaborative and mutually-informative. This risk is compounded for ERFA's overseas operations due to the factor of distance, and the reality that ERFA's Australian Staff can only have limited face-to-face interaction with overseas Partners. These risks underline the need for a set of principles that guide the relationship between ERFA and its Partners.

ERFA's relationships with its Partners are guided by 4 Partnership Principles:

1. Transparency and mutual accountability
2. Equity and autonomy
3. Collaboration
4. Continuous learning

1. Transparency and mutual accountability:

ERFA's commitment to transparency and mutual accountability with its implementing Partners is communicated in the MOU and/or Project Funding Contract. Transparency from all parties is a pre-condition for accountability and both are essential for fostering a relationship of trust.

The information and documentation required to enable ERFA to conduct due diligence and capacity assessments of its Partners are detailed in the ERFA Funding Application template, namely: legal structure, status and name of the governing authority; when the status was last renewed; copy of the governing instrument; names of the governing authority chair and membership; description of the program leadership, management structure and systems in place for program delivery and copy of the organisational chart; description of the program's internal financial management systems; names and roles of key program personnel and personnel responsible for program financial management; copies of program/staff handbook/manual and finance manual; copy of program property lease agreement or deed of ownership; details of authorisation of the funding application.

The critical document which sets out shared and respective contributions, expectations and mutual responsibilities of ERFA and its implementing Partners is the MOU and/or Project Funding Contract, which situates these within a context of respectful dialogue and collaboration. The agreement provides clarity with respect to leadership structures and roles and responsibilities of parties; the project financial support to be provided by ERFA for the period of the agreement and mutual accountabilities including those relating to reporting, sharing of information and policy compliance.

Transparency between ERFA and its implementing Partners in turn enables transparency and accountability to be extended to ERFA's Beneficiary and Donor stakeholders, achieved through increased confidence in the expected benefits of a Project and the appropriate use of funds respectively.

2. Equity and autonomy:

ERFA is conscious of the power balance that characterises its relationships with implementing Partners. Whilst certain requirements are conditional to funding, and non-compliance with these may result in ERFA's intervention and subsequent instruction to an implementing Partner, ERFA seeks to ensure that concerns are addressed in a collaborative and supportive manner. ERFA respects the autonomy of its implementing Partners to determine their own identity, govern and manage their entities, programming and resources.

These principles are founded upon mutual respect. ERFA's commitment to working in mutually respectful ways with its implementing Partners is articulated in ERFA's MOUs and Project Funding Contracts, which emphasise a spirit of respectful dialogue and collaboration. Through MOUs/Project Funding Contracts, parties commit to an alliance with mutual benefits and clearly identified responsibilities and accountabilities, where they will work together to achieve specific objectives in support of sustainable community-based education initiatives, which is ERFA's primary focus.

3. Collaboration:

Collaboration is critical to delivering development projects that are tailored to a particular community's identified needs and an implementing Partner's strengths, vision and purpose. Prior to establishing an MOU, entering a funding agreement or effecting a project, ERFA engages in a process of mutual ideation with the potential project implementing Partner to agree on project design and

strategy. Development tools such as logical frameworks, results chains and budget templates are used to combine both parties' input into an agreed document. ERFA maintains and fosters the partner collaboration process throughout the lifetime of a project. The monitoring and evaluation process is used by ERFA to gauge a project's outputs, outcomes and impacts and to determine links of causality between these performance measures as well as between these measures and the project's stated goals. ERFA works with implementing Partners, respectfully negotiating project strategies and delivery if and when required, to ensure ongoing alignment of vision and realisation of goals.

4 Continuous learning:

Healthy, effective partnerships need to continuously review their purpose, goals and impact. ERFA is committed to creating an environment where all parties to an agreement are provided the opportunity to evaluate one another's efforts. ERFA is invested in supporting the continuous learning and capacity building of its implementing Partners in a number of contexts. ERFA assists implementing Partners with their Project planning, budget preparation, Log Frame development, risk management planning and formulation of internal M&E Plans. Training sessions in fields such as financial management and policy compliance are also provided as is funding for specific approved capacity building initiatives. ERFA maintains regular contact with its implementing Partners and facilitates specific requests with respect to capacity building and providing opportunities for sharing information across projects in its wider network.

In Quarterly Monitoring Reports ERFA asks implementing Partners to indicate any future needs or issues that emerged during the quarter. All report templates invite implementing Partners to provide feedback on any aspects of their working relationship with ERFA. An annual Partnership Health Check and Capacity Building Survey enables implementing Partners to provide feedback to ERFA on the partnership and the quality of capacity-building support. These reports and surveys provide an avenue for continuous learning for all parties. Constructive feedback provided by implementing Partners allows ERFA to reflect on its role as Partner and to adapt strategies to best enhance capacity building activities. Likewise, ERFA provides report feedback to implementing Partners requesting clarification if required and sharing knowledge and learnings.

ERFA Stakeholder Definitions

1.0 Purpose of this document

The following document seeks to clarify the nature of the relationship Edmund Rice Foundation Australia (ERFA) maintains with its various stakeholders.

2.0 Organisational overview

ERFA is an international development organisation with a global footprint. ERFA is committed to supporting the education of the most vulnerable. Projects supported by ERFA have a clear and deliberate focus on the education of people and their communities. These Projects seek to develop the life skills of their Beneficiaries and to change their own world and be a force for positive change around them. In partnership with others across the globe ERFA supports the UN Sustainable Development Goal Number 4:

Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

ERFA's core functions are to:

- support local communities in developing countries through projects which are inclusive, empowering, community-led and which aim to result in local ownership and autonomy;
- support projects in Australia to advance education, create opportunities and advocate for youth and those affected by marginalization
- partner with Australian supporters for impact and offer innovative opportunities for deep engagement between donors and the projects they support;
- grow and diversify funding streams including seeking funding from the Australian government and corporate Australia;
- build an efficient, effective and sustainable organisation committed to financial transparency and investing in the skills and expertise of staff and programs.

3.0 Areas of operation and role of ERFA

ERFA operates in various overseas countries, including countries in Africa, India, Papua New Guinea, the Philippines and Timor Leste. Within these countries ERFA works with implementing partners to provide identification and design support, funding, capacity building, monitoring and evaluation for education-based projects.

ERFA provides grants for education and advocacy projects in Australia that are governed by an Edmund Rice entity. ERFA monitors these projects but, compared to its overseas operations, there is less focus on capacity building, project design and evaluation as the responsibility for this falls to Edmund Rice Ministries Oceania (ERMO).

ERFA's focus on education spans three areas: formal education (including schools, co-curricular, learning support, vocational education & training); community education (e.g. health, sanitation, livelihoods, agriculture, life-skills); and development education (grassroots advocacy such as human rights, environment, gender equality).

Projects are the fundamental building block of ERFA's development work. Projects facilitated by a common stakeholder or with a shared goal in mind can be grouped under the umbrella category of Program.

4.0 Project and Program distinction

Projects	Some Projects are the development activities of a larger Program. Some Projects are standalone initiatives.
Program	Programs are overarching development approaches and initiatives that set priorities and guide Project outcomes, results and activities. Programs can be Edmund Rice ministries or other entities.

5.0 Stakeholder definition

This document makes a distinction between ERFA's Organisational Stakeholders and Project Stakeholders.

5.1 Project Stakeholders

Project Stakeholders comprise a complex set of relationships that are broadly defined as anyone who is involved with the physical delivery or acceptance of an ERFA-partner Project. This category includes:

- **Partners:** those organisations who receive cash and in-kind support from ERFA are responsible for the delivery of Projects. Partners are not directly employed by ERFA. Whilst ERFA has an active, engaged and qualitative role with its Partners, working to build capacity and maximise the impact of best practice development outcomes, these are not partnerships in the legal sense. Rather, they are alliances that ERFA has formed with in-country organisations whose vision, mission, values, policies and development goals are congruent with those of ERFA. In short, Partners implement Projects and ERFA supports them.
- **Beneficiaries and Associates:** Project "Beneficiaries" are the primary stakeholders and are those who are the direct participants and recipients in ERFA-partner Projects. "Associates" are members of the community in which a Project is facilitated, who, whilst not being the direct recipient of the service, are involved in some capacity with the facilitating Partners and Beneficiaries. For example, a parent who escorts their child to and from an education-focused Project is regarded as an Associate.

Project Stakeholder definitions

Partner	Any organisation which has a MOU / contract with / or receives funding from ERFA
Beneficiaries or Primary Stakeholders	Children and adults who participate in and benefit from Projects
Associates	Anyone in the community who interacts with an ERFA Project whilst not being the direct beneficiary of a Project

5.2 Organisational Stakeholders

Organisational Stakeholders are defined as those outside of the Project Stakeholder category, namely, those involved in the behind-the-scenes, organisational side of Project delivery. This includes ERFA's staff in Australia and Kenya. Staff are directly employed by ERFA.

ERFA's Australian staff, based at offices in Brisbane and Melbourne, manage responsibilities relating to both domestic and overseas programs. ERFA's Kenyan staff, based at an office in Nairobi, provide capacity-building support to all ERFA's African-partner programs and, in some cases, provide support to programs in the greater Edmund Rice network.

Organisational Stakeholder definitions

Staff	Employees, contractors, subcontractors, outworkers, apprentices and trainees, work experience students, volunteers and any other person who performs work for ERFA
Donors	Edmund Rice Education Australia (EREA) and other schools, corporate organisations and members of the public who contribute to ERFA in cash or in kind

6.0 Types of Partner agreements

Due to the variability inherent in ERFA's definition of Partner – “any organisation which has a MOU / contract with / or receives funding from ERFA” - ERFA's Partners differ in scale and scope. Consequently, the formal agreements that ERFA holds with its Partners also differ.

In the case of entities or Edmund Rice Ministries seeking funding for projects, the agreement takes the form of an annual tripartite project funding contract, one that commits ERFA, the Program Governing Body and the Program's internal Project Partner(s) to a common goal.

In the case of standalone projects designed and implemented with other INGOs, the agreement takes the form of a Memorandum of Understanding (MOU), generally of a 3-year duration, characterised by delegation of responsibilities and three (3) terms of annual funding agreements.