Development and Cooperation from A to Z

A manual for a successful partnership
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Preamble

This guide builds on the experience gained by EI and its affiliates in the field of international cooperation and was developed with the valuable contributions of trade unionists involved in cooperation projects in the North and the South. Based on those concrete experiences and on the successes and difficulties encountered, this document aims to highlight a few guidelines for a successful international trade union cooperation project. Given that education is at its very core an intervention by humans on humans, teacher trade unionism is necessarily complex and thus it is difficult to predict the success of a project in this field. In other words, there are thousands of ways to proceed, and no model is infallible! Nevertheless, we hope that this tool will contribute to reflection, create vocations among the trade unions not yet engaged in international cooperation projects, help to avoid certain pitfalls and make use of human and financial resources as efficiently as possible.

Introduction: trade unionism means solidarity

Education International is a global network of 400 trade union organisations, in 175 countries and territories. Overall, over 32 million teachers and education employees are grouped together in this large family. Regardless of the country in which they work, these educators share identical values. They work to achieve quality, inclusive and free public schooling - which is the only way to build societies of peace in which citizens are informed stakeholders – along with statuses guaranteeing the rights of employees, protective social systems, environmentally-friendly economic systems and democratic and just societies.

Since its inception, trade unionism has been based on solidarity between workers, relying on strength in numbers to defend interests and obtaining new rights which could not have been attained alone.

Education International’s action is fully in line with this legacy. Some affiliates have extensive experience in international cooperation, the concrete implementation of the spirit of solidarity that characterises the trade union movement. EI encourages all affiliates to develop or deepen relations with trade unions in the same country, in neighbouring countries, and even in other regions.
Why carry out cooperation projects?

A matter of solidarity across borders

International trade union solidarity is an extension of the solidarity that each trade union promotes among its members and within its country.

To cooperate with a trade union in another country is to become part of the community of teachers, to join the global community of teacher trade unions, and to put into practice our core value: that those who enjoy a better situation should be responsible for helping those who face difficulties, and the latter, in turn, should feel comfortable in seeking help from the community.

Interacting with others allows people to learn about themselves

Even in the most developed countries, trade union organisations are confronted with a number of difficult questions: How can they attract new members? How can they petition in a truly collective manner? How can they acquire better expertise on educational issues? How can they better share their values and messages with the profession as a whole and with the entire population? How can they create broad alliances? How can they mobilise on a large scale? How, in short, can they obtain better outcomes?

Trade union cultures often vary from one country to the next, largely as a result of the great diversity of education systems, territorial organisations, school curricula, teacher training programs and methods of dialogue employed between trade unions and the authorities. Far from being obstacles, these differences can in fact constitute a helpful point of reflection by which to answer the questions listed above. Unions, then, should not be wary of their cultural differences, for in interacting with one another they will realize that they all face the same difficulties and can find ways to overcome them together.

Helping others is helping oneself

In every country, the success or failure of an education system has an impact on a variety of crucial matters. These include: social cohesion, economic development, democratic functioning, eradication of corruption, independence of the judiciary and freedom of the press, tax collection, independent policymaking and national development and security.

Because of globalization, the economic, political and ecological decisions of individual countries have not only a regional impact but also a worldwide one. With this in mind, it is in everyone’s interest that the education system of every country provides a quality education for all students until the completion of their secondary education, as stated in SDG 4.
Cooperation projects: what is their purpose?

Projects should benefit organizations

Education International Development Cooperation aims to strengthen education trade unions. Even if people as participants in workshops or conferences come out enriched with new knowledge and skills, it is important that they recognize their responsibility to share these benefits with their organization. How this sharing between the delegate and his/her union takes place must be clearly defined within the project description.

Projects should serve trade union strategies

It is important that cooperation projects be in line with the orientations and strategies of each of the cooperating partners. Otherwise, these projects may not really strengthen the unions, since they are not consistent with the union's policies.

Projects should help build sustainable organizations

All international cooperation projects must have as their goal, whether in the short or long term, the achievement of autonomy for the trade union receiving support. Failure to prioritize this goal and translate it into concrete actions could lead the partners to rely too heavily on the support of others and thus create a sense of dependency in the long term.

Cooperation projects: what resources should we use?

Self-financing

What it implies
Implementing international cooperation using one's own resources means:

- full autonomy in the choice of partners and work topics;
- avoiding time-consuming procedures and formalities;
- working with a restricted budget.

The rule of 0.7%

As the UN recommends that all countries devote 0.7% of their Gross Domestic Product to development cooperation (see the link to the Resolution of 24 October 1970), Education International encourages its affiliates to devote the same proportion of their resources to solidarity activities (see the link to the resolution adopted at the Congress in 1998). EI applies this principle by contributing 0.7% of its membership dues to the solidarity fund each year. Similarly, several EI
affiliates have for years implemented systems that are aimed at saving a specific annual budget devoted to international solidarity.

**External financing**
Despite the fact that trade unions and education projects are not often considered a social priority, it is still possible to find donors who will support cooperation projects.

**Which partners?**
National development agencies have financed or currently finance projects organized by teacher trade unions from their countries. UN agencies, foundations and NGOs are also potential sources for additional financing.

**What it implies**
Requesting budgets from other parties means:

- accepting their priorities: although their projects may be of interest to union members, these organizations may not always share the priorities of the unions participating in the project;
- recognizing that it comes with a political and strategic risk: union projects may fall prey to a sudden change in the donor’s policies or preferences;
- submitting the whole project to the donor’s requirements in terms of follow-up, assessment, accountability, and burdensome technical and administrative constraints.

**‘Low-cost’ cooperation projects**
New means of communication (Internet, e-mail, social media, videoconferencing, etc.), make it easier to quickly exchange information between cooperating partners. As a result, it is possible to share documentation and conduct meetings and regular exchanges remotely, without necessarily having to make a long and expensive trip.

Sending delegations to nearby or neighbouring countries is also an inexpensive way to discover other approaches to union activism, to reflect on these approaches and to work towards improving existing practices.

**Cooperation projects: who should we work with?**

**Consortiums**
Collective work, although it may complicate the development and the follow-up of the project, is an additional source of experience-sharing and enrichment that will ultimately help advance project goals.
Bilateral/multilateral projects

Some cooperating partners have longstanding relationships, either because of political/cultural similarities or for other reasons. Knowledge and mutual respect make relations easier throughout the course of the projects, but that strong link can turn into dependence if unions are not careful.

In addition, when in a given country several affiliates request a cooperative partnership, privileging only one or some of them can contribute to or increase tensions that harm trade union unity. To prevent this from happening and to foster closer cooperation among these unions, the partners can encourage them to all work together on the same project.

South-South cooperation

Considering the fact that financial resources for international cooperation are limited, it is critical that unions – especially those in the South – find other means of strengthening and supporting one another. Moreover encouraging South-south cooperation will help to reduce issues of cultural bias.

Cooperation projects: on which topics?

The partnership must be based on the needs assessed by participating unions. This means that unions can objectively assess its strong and weak points and prioritise their needs. A participative needs-identification session must be organized beforehand.

The nature of cooperation projects can vary, from simple one-off exchanges of experiences between two unions to multi-partner programmes planned over several years and covering several topics.

Below, a non-exhaustive list of the topics most often covered by cooperation projects.

**Strengthening the union and its structure**

- The territorial network
- Collection of membership fees
- Internal organisation
- Project management
- Trade union communications
- Trade union renewal

**Strengthening the union’s impact**

- Trade union unity and other alliances
- Action-oriented research
- Advocacy, social dialogue, negotiation
- Trade union actions and campaign

**Capacity building for activists on the governance of education**

- International stakeholders (UNESCO, ILO, OECD, World Bank, etc.)
- Trade unionism and policy development
- Budgeting and Financing of education
- The privatisation of education
Capacity building for activists on human and trade union rights

- History of trade unionism
- Human and trade union rights
- Children rights
- Gender, equality
- Discrimination, inclusion
- Persecution

Capacity building for activists on educational issues

- Individual or collective assessment systems (PISA, PASEC, etc.)
- Skill-based approach
- School programmes
- Language of learning
- The importance of early childhood education,
- The importance of vocational training and the adaptation of training/employment
- The importance of higher education
- Safe schools
- The pedagogical movement

Capacity building for activists on issues related to education personnel

- Vocational training, initial and continuous
- Quality education
- Quality terms of employment
- The status of teachers
- Professional ethics
- Supervisory staff
- Support staff
- Migrant / refugee teachers
- Capacity building for activists on social issues
- Climate change
- Economic crisis
- Education for peace
- Racism and xenophobia
- Sexual diversity
- AIDS / HIV

Professional capacity building for activists

- Support for unions and activists in emergencies
- Natural disasters

Making a good start

In order to make a good start, it is important to:

- make relevant the use of needs as a basis;
- take the time to co-build a project;
- be open, avoid prejudice, understand frustrations, overcome cultural and linguistic differences;
- understand the history, Articles of Association and functioning of the union, the role of the
government, understand the specificity and complexity of the situation in the country;
- build a relationship based on trust and confidence.
Avoiding pitfalls

**Giving, receiving**

The donor/recipient relationship in inherently unequal, regardless of each party's efforts to ensure that the relationship is as balanced as possible. This reality requires constant attention from the donor, who must scrupulously ensure that the project truly matches the receivers' needs. A sense of ownership is a must for organizations participating in any project.

Furthermore, in a difficult socio-economic context, the issue of profiting through a cooperation project is a delicate one, since the decision to work with a given organisation could be impacted by financial motives. The generally accepted principle is that an activist should not be made poorer or richer as a result of taking part in cooperation projects.

**Hidden agendas**

Hidden agendas are always an issue. Within the frame of the cooperation agreement all the relevant issues, as well as the most apparently irrelevant details, need to be shared openly with all participants. Likewise, when a project is financed by donors, the agreements between donors and project participants also need to be fully disclosed.

**Follow-up and assessment**

The more difficult the socio-political context is, the more difficulties the union will meet; the longer the list of risks, the more relevant and important the follow-up becomes. Despite the invaluable help provided by modern means of communication, nothing can replace human contact, particularly in the event of misunderstandings or delays/obstructions. With this in mind, a field mission can help to clarify matters, to reassess objectives, or to revise the schedule for the project's implementation.

Sometimes it can be difficult to perform an effective follow-up if internal or external changes occur and are not considered in the formulation of the project.

**How to realize the completion of a cooperation project**

External assistance is not meant to be permanent, but rather should be seen as temporary support that enables a union to become autonomous. Thus, it is ideal that a project's completion be planned and anticipated from the outset: in every project it is critical that the partners agree on an exit strategy.
El’s role

Development Cooperation activities conducted or coordinated by EI are framed by policies and regulations adopted by the World Congress and the Executive Board.

Through its Regional Offices located in all the regions of the world, EI possesses invaluable knowledge about local realities and is thus able to provide technical support to affiliates engaged in international cooperation projects.

EI’s Solidarity and Development Unit is available to:

- coordinate bilateral or multilateral cooperation projects,
- create networking opportunities between cooperation partners.
ANNEX  36th Executive Board meeting, 22-24 March 2011 EI POLICY DOCUMENT ON DEVELOPMENT COOPERATION

1. **Education International Development Cooperation policies, principles and objectives.**

Solidarity constitutes one of the main principles of the trade union movement. The relations and interactions inherent within the trade union movement are recognised as one of the most powerful precursors to social justice.

Solidarity is expressed by creating equal opportunities for not only trade union members, but for all individuals and groups everywhere. Solidarity recognises our colleagues and comrades as equals. Exchange and interchange signify a relationship of equals, a cornerstone of social justice.

Development Cooperation:

- constitutes an important tool for international trade union solidarity;
- helps to promote social, political and economic justice;
- contributes to positive transformation and developmental change within society;
- facilitates understanding of economic, social and labour problems in the world;
- helps people to become aware of their democratic and trade union rights and responsibilities whilst challenging societies to meet the needs of their people;
- influences and contributes to develop and improve the public education sector;
- contributes to gender equality by fighting against all forms of discrimination in unions and at the workplace.

As Education International member organisations we are all guided by a political framework that constitutes the basis of all DC cooperation. Education International considers Development Cooperation as a core business for two main reasons: first, to expand access to quality public education for all everywhere in the world as a human and social right and, secondly, to organise the teacher and education workers’ trade union movement to promote, defend and expand the rights of teachers and education personnel. As EI member organisations, we are all guided by a political framework that constitutes the basis of all DC cooperation.

Three major global crises - climate, food and economic - confront and challenge us. For Education International, global crises such as these are best met with a collective and inclusive approach. Underscoring that approach is a fundamental belief that all people have a right to access good quality education and that all workers should be guaranteed good working conditions so that social, political and economic justice prevails in society.
The work of EI member unions to strengthen and promote education unions around the globe predates EI's founding Congress in Stockholm in 1993.

Since its inception Education International, together with its affiliates, has remained deeply committed to carrying out Development Cooperation in accordance with the principles and standards defined in this policy document.

**Policies**

At its Second World Congress (Washington DC 1998) EI members passed a Resolution on Development Cooperation which

- establishes the basic principles that serve as guidelines for cooperation within EI and outlined the need for ongoing and open debate on the quality of DC activities;
- emphasises transparency, effectiveness and clarity, critical dialogue and respect for each other's demands and priorities;
- highlights the need for ‘in depth’ insight in to structure and outlines between the cooperating partners;
- recognises EI's coordinating role;
- calls on EI and its members to meet the 0.7% income allocation to DC work and called on member organisations to raise awareness across their membership about DC work.

At its Fourth World Congress (Porto Alegre 2004) EI members further developed some of these mandates by voting on two resolutions (Education for Global Progress and Promoting Quality Education) which underscores the organisational commitment of EI to

- contribute to the achievement of the MDGs and take actions to support member organisations, especially in those countries most affected by the policies of the International Financial Institutions (IFIs) which undermine trade union values and rights and the right to quality education.

Latterly, in July 2007, at the Fifth World Congress in Berlin, EI member organisations approved two Resolutions (Joining together to build a more effective Union Movement and United for greater Justice) which,

- declares EI's continuing commitment to international union development cooperation as an integrated and core element of trade union policy;
- mandates the EI Executive Board to encourage all member organisations to become actively engaged in bi-lateral and multilateral trade union development cooperation programmes, ensuring financial and human resources;
- resolves to develop further strategies and plans that ensure the accomplishment of the goals of the national unions;
- reaffirms commitments to unions working towards achieving the Millennium Development Goals, Education for All and Social Justice by calling on member organisations in OECD and other donor
countries to lobby their governments to allocate a decisively higher share of their budget to education in general and for transparency of expenditure from these funds.

**Objectives**

The objective of Development Cooperation within EI is to assist in the development of independent and democratic education unions in order for them to:

- Represent and defend the interest of union members: promote trade union rights, international labour standards (through ILO Core Conventions), freedom of association, the right to form a trade union, to collective bargaining and to undertake actions; responds to equality fighting all kinds of discrimination; and provide a high quality of service to union members.
- Defend the status of teachers and education workers and promote the teaching profession: improve the working and employment conditions and professional status and promote the professional liberties of education sector workers and the right to participate in education policy-making and social dialogue.
- Work towards the Education for All and Millennium Development goals: promote peace, democracy, social justice, equality and human rights through solidarity; assist in the reduction of poverty through education; assist in building sustainable communities and environments; assist with conflict resolution; and help with reconstruction/rehabilitation after natural and human disasters, particularly with regard to access to education.

The objectives articulated above are drawn broadly recognising that cooperating organisations will develop their own focus as is appropriate to them, within this overarching indicative framework.

**Principles**

The following principles, based on trade union values of solidarity, respect, collectivism and cooperation, should form the basis of Development Cooperation within EI.

**Partnership**

- grounded in solidarity, equality, strategy, exchange, co-responsibility, respect and inclusion;
- working towards equal relationships and partnerships;
- emphasises cooperation, dialogue, exchange and the sharing of skills, experience and expertise;
- inclusive and based on a mutual commitment;
- favours cooperation with other civil society organisations where appropriate.
- accommodates with cultural diversity

**Need-based and context-specific**

- an opportunity for all partners to work together towards meeting their needs; based on self-evaluation and joint analysis between the partners;
- linked to objectives, strategic plans and mindful of the political and administrative procedures of the partners;
- based on specific contexts;
- rooted in the membership of all partners and built on their respective strengths.
Accountable and transparent
• based on sharing of information among partners and more widely;
• transparent and accountable to membership and constituencies.

Long-term
• favouring sustainability a long-term commitment of all parties
• but nonetheless recognising, where appropriate, short-term interventions to facilitate the transfer of specific technical skills and knowledge.

Strategic and adjustable
• carried out with clear objectives, time tables, action plans and roles and responsibilities of all partners;
• capable of capacity building for all partners to meet agreed objectives;
• adjustable to changing circumstances.

2. Roles and responsibilities of the partners involved in Development Cooperation.
Furthermore, the various stakeholders recognise their specific responsibility to guarantee both appropriate and effective interventions in the context of their Development Cooperation work.

All DC partners will:
• act in accordance with the principles stated above
• participate in the development, monitoring and evaluation of DC partnerships
• be accountable to their constituents and respective members with regard to involvement in DC partnerships
• be central players in planning, implementing, monitoring and evaluating DC activities • adhere to the reporting requirements and other commitments and obligations in accordance with agreement between partners • ensure appropriate human and financial capacity to carry out the DC activities agreed upon
• inform all stakeholders of any significant developments or concerns that may prejudice the effective implementation of the DC activities as agreed
• be transparent about all financial matters
• respect democratically agreed political priorities of each others organisations
• work to have contingency strategies to ensure funding of projects and programs in the event of cutbacks and/or interruptions in back-donor funding
• ensure transparency about funding sources and their DC policy
• actively work to keep informed of EI policy, DC strategies and priorities
• provide information to EI for the EI database on DC activities
• cooperate and share information with other EI member organisations involved in the same country or with the same organisation
• make efforts to build the institutional capacity of all unions seek to promote the greater involvement of young people and women in trade unionism
More specifically, EI at the Head and Regional Offices will:

- provide local and regional contextual information about the member organisations in the region upon request
- assist in matching funding opportunities with identified needs of member unions
- analyse DC work in the region with a view to disseminate learning and best practice across the region to all interested EI members
- assist in facilitating strong relationships between DC partners
- participate in DC partnership activities upon request and when feasible
- inform interested stakeholders whenever duplication of efforts are detected
- facilitate the dissemination of information received from EI members on DC partnerships
- provide strategies and priorities based on EI resolutions/policies, to guide affiliates’ DC activities
- update the DC database to reflect the information received from partners and thus be a repository for general information on DC work
- provide information of latest trends in Development and Cooperation work in relation to the trade union movement
- take a lead where appropriate in the implementation of multi-lateral DC networks or partnerships
- ensure coordination of DC with all other EI activities
- promote DC activities widely among EI members
- act as an advocate for DC with global institutions and governments