

A close-up photograph of a woman with a warm, joyful expression. She is wearing a traditional white lace blouse with a vibrant, multi-colored floral embroidery around the neckline and on the sleeves. The background is softly blurred, showing other people in a social setting.

Christian Aid Guatemala: learning from ACTuando Juntos, an ACT Alliance joint programme

An exit learning review

March 2021

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Research
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Cover: ACTuando Juntos (Jotay) seeks to support people to organise and empower themselves, and demand their rights for sustainable development, justice and equality. Image credit: Jotay.

List of abbreviations, acronyms and partner organisations cited in the report

Act CoS	Act Church of Sweden
AGIMS	Asociación Grupo Integral de Mujeres Sanjuaneras, a Jotay partner
BftW	Bread for the World
CCC	Jotay Cooperation and Coordination Committee
CONGCOOP	La Coordinación de ONG y Cooperativas, a Jotay partner
COPAE	La Comisión Paz y Ecología, a Jotay partner
E8	The eight sister agencies of the ACT Alliance family based in Europe, plus Lutheran World Federation (LWF), which is an implementing agency of several European partner-based agencies. Six of the eight agencies are joint partners in Jotay: Bread for the World, Christian Aid, Act Church of Sweden, ICCO Cooperation (now part of CordAid) in the Netherlands, Norwegian Church Aid, and Lutheran World Federation
FONGI	Forum of international non-governmental organisations in Guatemala
GGM	Grupo Guatemalteca de Mujeres, a Jotay partner
GOAT	Getting our ACT Together (GOAT)
ICCO Cooperation	The Interchurch Organisation for Development Cooperation, a faith-based organisation for Relief and Development Aid based in the Netherlands
ICEFI	Instituto Centroamericano de Estudios Fiscales, a Jotay partner
Jotay	ACTuando Juntos
Jotay SB	Jotay Supervisory Board
Jotay CCC	Jotay Cooperation and Coordination Committee
LWF	Lutheran World Foundation
NCA	Norwegian Church Aid
PME	Planning, monitoring and evaluation

Executive summary

In 2020, Christian Aid decided to end its presence in Guatemala, as part of a wider restructure of Christian Aid. This review seeks to celebrate the work of the programme, and capture learning to share with partners, other Christian Aid programmes, and the development sector.

Since 2017, most of Christian Aid's presence in Guatemala has been part of ACTuando Juntos, (referred to by its abbreviated name, Jotay, throughout the remainder of this document),¹ a collaboration within the ACT Alliance, which is a coalition of 135 churches and faith-based organisations working together in over 120 countries. At the start of 2020, Christian Aid was working with seven partners in Guatemala, six of which had at least one project in Jotay. Christian Aid's exit from Guatemala at the end of December 2021 will mean a simultaneous exit from both Jotay and the country.

Jotay came into being in Guatemala as part of a wider ACT Alliance initiative, Getting our ACT Together (GOAT). It was one of a number of pilot initiatives that were intended to explore different joint programming models in countries, which also included South Africa and Zambia.

Jotay seeks to support people to organise and empower themselves, and demand their rights for sustainable development, justice and equality – in local, national and global spaces of governance. It

seeks to encourage the voice, abilities, synergies, and strategic processes of social organisations and movements of women, youth, indigenous peoples, rural communities, migrant populations, and human rights defenders.

The review describes Jotay's ambitions, structures and achievements, and in doing so provides a snapshot of the joint programming model it embodied. It also discusses some of the challenges encountered: how a need to focus on governance and administration can hamper programme delivery and leave little room for adaptive programming or linking to global advocacy.

In its short life, Jotay has already set down a marker of achievement. Recognising the complex nature of results expected in a programme focused on human rights, there have been some significant steps towards seeing systemic change that will sustainably benefit the programme's target groups. Maintaining this success will depend in part on the governance model Jotay chooses to use in the future. The review closes by highlighting a series of suggestions for the future, which include building on commonalities, strengthening the faith-based focus of the joint programme, refining the Planning, Monitoring and Evaluation (PME) system, promoting more joint action between partners and amplifying advocacy campaigns.

Introduction

In 2020, Christian Aid decided to end its presence in Guatemala, as part of a wider restructure of Christian Aid. This review, written by Christian Aid's Global Monitoring, Evaluation and Learning Manager, Alix Tiernan, seeks to celebrate the work of the programme, and capture learning to share with partners, other Christian Aid programmes, and the development sector. It is one of a series of reviews (also covering Angola, Brazil, Ghana, the Philippines and South Africa), which will be published on the research, evidence and learning section of Christian Aid's website.

Since 2017, most of Christian Aid's presence in Guatemala has been part of Jotay, a collaboration within the ACT Alliance, which is a coalition of 135 churches and faith-based organisations working together in over 120 countries. At the start of 2020, Christian Aid was working with seven partners in Guatemala, six of which had at least one project in Jotay.

Jotay came into being in Guatemala as part of a wider ACT Alliance initiative, called Getting our ACT Together (GOAT). It was one of a number of pilot initiatives that were intended to explore different joint programming

models in countries, which also included South Africa and Zambia.

Jotay was the result of extensive discussions and collaboration between five of seven ACT Alliance's European members – Bread for the World (BftW), Christian Aid, Act Church of Sweden (Act CoS), ICCO Cooperation, Norwegian Church Aid (NCA) – and Lutheran World Foundation (LWF). In this report we refer to this group of agencies as E8 agencies. ICCO Cooperation has since left the joint programme, and Christian Aid will exit in December 2021.

Jotay aims to unify and strengthen support to Guatemalan civil society, particularly faith-based civil leadership, in the promotion of human rights in Guatemala, whilst tackling social injustice (particularly gender-based violence) and respecting ecological sustainability.

Since 2017, Christian Aid's participation in Jotay has been through the presence of the Christian Aid Programme Officer, based in the Jotay office in Guatemala City, and jointly managed by Christian Aid and Jotay. Christian Aid's exit from Guatemala will mean a simultaneous exit from both Jotay and the country.

Jotay: context, mission and stakeholders

In 1996, Peace Accords were signed in Guatemala that were designed to end 36 years of civil war. Even though important progress has been achieved with peace-building, new clusters of inequality have emerged during the post-conflict decades. Guatemala ranks among those Latin American countries with the highest rates of gender, tax and land inequality, as well as malnutrition, exclusion of indigenous peoples, sexist and social violence, and corruption and impunity. Its population also face considerable risks and vulnerabilities caused by climate change. The Rule of Law is not guaranteed as a solid institutional platform to guarantee human rights, access to effective justice, or accountability and transparency of public expenses and acts.

Positive changes during this post-conflict phase have been especially due to the recurring efforts of citizens to hold the state to account for its legal obligations.

In solidarity with such efforts, rooted in its ecumenical identity, Jotay seeks to support people to organise and empower themselves, and demand their rights for sustainable development, justice and equality – in local, national and global spaces of governance. It seeks to encourage the voice, abilities, synergies and strategic processes of social organisations and movements of women, youth, indigenous people, family and rural communities, migrant populations, and human rights defenders since these groups represent excluded peoples that are fundamental in a democratic society, and aim to ensure everyone is able to exercise their right as agents of their own development.

It is of strategic importance to Jotay to strengthen the processes where faith-based actors and organisations have demonstrated a proven capacity to play a key part in defying and changing social norms and destructive behaviours. Even though faith-based actors have often hindered the promotion of gender equality, they are also part of the solution and can make a very important contribution to safeguarding the rights of excluded groups.

Methodology

This review aims to celebrate the successes of Jotay, but also to pave the way for learning for future collaborations between E8 agencies and other actors.

The review of the Guatemala programme was undertaken by Alix Tiernan, Global MEL Manager, and included 11 interviews with staff of Christian Aid, Jotay and partners.² It also included a review of Jotay documentation produced during its formation and implementation.³ Key documents included the original memorandum of understanding (MoU) for 2017–2019, the strategic plan developed in 2018, the

advocacy strategy developed in 2019, the mid-term review from 2019, annual action plans for 2019 and 2020, the 2019 annual report, the budget for 2020–2022, and the interim MoU for 2020.

The findings are structured according to the learning questions in the terms of reference for the set of learning reviews.

Quotations from interviewees are used to support the findings of this report. Quotes were anonymised, although at times it was useful to show whether the quote was from an E8 agency/Jotay staff member or a partner staff member.

1. What is the joint programme model in Guatemala?

Ambitions and opportunities

There were both practical and strategic reasons for setting up Jotay. In 2015, there was strong support within the ACT Alliance for collaborative working, and the GOAT initiative was influencing thinking within and between the E8 agencies. The E8 agencies are defined by many commonalities that are conducive to working jointly, partly having similar values inspired by Christianity, and favouring a partnership-based approach to development.⁴ In Latin America, E8 agencies were feeling the pressure of decreasing donor funding for the region. Norwegian Church Aid (NCA) in particular would have had to pull out of the region if it had not been for Jotay. As one interviewee said: 'we struggle alone, but together we can survive and create programmes.'

Beyond this, there were other reasons why Jotay was something to aspire to. There was a clear mandate from ACT directors that collaborative working between E8 agencies was a desired model, and this gave members of the Jotay Supervisory Board (SB) and its Cooperation and Coordination Committee (CCC) the incentive needed to press ahead, even when the going got tough. As the mid-term review states: 'The E8 directors and international directors stated their expectations for the pilots as being based on deliverables in three areas:

- efficiency savings achieved
- increased impact (results greater than the sum of the parts) and
- joint fundraising or new resources mobilized that would otherwise not be available.'⁵

According to the interviewees speaking on behalf of Jotay, there were many reasons why a joint programme approach was, and continues to be, pursued. They:

- thought it could improve our contribution to a country and partners
- wanted stronger impact, better programming and accompaniment of partners
- wanted better coordination in the region, and to reduce administrative structures
- wanted to see greater added value: be more efficient, access more donors, be more competitive
- wanted a greater voice for influencing and advocacy in networks
- wanted an ecumenical approach to tackling some tricky issues, like gender justice
- wanted to reduce the workload of partners.

Partner voices expressing what they expected of Jotay were similar:

- 'There were common points between the agencies, especially a faith-based approach, and working closely with local and indigenous organisations, but they didn't coordinate in the field – they ... felt more impact was possible when working together.'
- 'By coming together into a new space, the [E8] agencies could continue to support us.'
- 'We were hoping that by unifying resources, we would be able to reach more beneficiaries.'

Jotay structure and identity

In Guatemala, the joint programme was built on a 'host agency' model. This model is based on collective governance and shared roles, although the responsibilities and risks might differ between participating agencies. The host agency model, in contrast to the lead agency model, asks the host organisation to relinquish control when it comes to decision-making, despite assuming greater risk and responsibility for the programme as its legally registered entity; this is both advantageous and challenging for the host organisation. LWF, created as an implementing organisation to facilitate collaboration between Lutheran agencies, seemed appropriate for the host agency role. In this way Jotay was able to avoid registering as an entity itself, a process that would have set its development back by about three years. While LWF carried the most legal and administrative risk, Act CoS, BftW and NCA were also contributing more funding than either Christian Aid or ICCO towards the administration and management costs; this reflected their formal, close relationship with LWF.

The governance arrangements that were put in place to set up Jotay included the establishment of the SB, the CCC and the recruitment of a Jotay coordinator, who was line managed by the chair of the CCC. After that, the project team was made up of administrative and finance staff hired specifically for Jotay, plus one programme officer for each partner agency, who was employed by their partner agency, but also had a line management arrangement with the Jotay coordinator.

After the mid-term review, challenges and difficulties with this model, discussed in more detail below, led to it being reconsidered. Three options were discussed: a localisation model; a model where Jotay would function as a separate country programme within LWF; and keeping the LWF Central America

programme as host, but with some adjustments. While the Jotay CCC favoured either of the first two, in the end the third model was agreed upon. Some interviewees expressed concerns in relation to the localisation model, cautioning against the creation of a completely new, separate entity. One interviewee suggested that 'oversight of a localised model would have required just as much work'.

Given the LWF's continued role as host to the Central American programme, it was agreed in subsequent meetings, however, that the specific and additional responsibilities and risks to LWF should be explicitly recognised and adequately reimbursed, beyond the administrative and logistical costs that had already been budgeted for.

All interviewees – Jotay/E8 agency staff, and partners – had a different perspective on Jotay's identity. Some clearly felt that Jotay was on the way to developing an independent identity from its E8 agencies:

- 'We did continue to try and build a collective identity.' (Jotay)
- 'Jotay should augment impact not as an independent organisation but as a programme with a separate identity.' (Jotay)
- 'We had an MoU, and a joint strategy, but needed to build an identity as a joint programme with the staff.' (Jotay)
- 'Jotay is both a programme and an entity – it doesn't fit to our traditional categories, or into our systems and ways of working.' (Jotay)
- 'Jotay seeks to achieve a common objective, focusing on human rights, the rights of indigenous people and gender rights. It has its own identity.' (Partner)
- 'At first, I was sceptical that Jotay could become an entity in its own right, but now... we see Jotay as an ally and a stand-alone competency in Guatemalan civil society.' (Partner)

There were others who saw Jotay as a delivery mechanism but not an entity in itself:

- 'Jotay is an organisation of agencies which pooled their resources. They seek to achieve a general objective and a common focus.' (Partner)
- 'Jotay is more like a consortium than a separate entity... It has defined a focus of work which unites the perspectives of a group of like-minded organisations, with a democratic approach to agreeing its objectives.' (Partner)
- 'Jotay is more than a consortium which presents something together like proposal: it is more a process than projects, and very focused on longer-term relationships.' (Partner)

- 'It is a joining together of the interests of agencies.' (Jotay)
- 'The intention was to build joint collaboration at Central American level.' (Jotay)

One interviewee said: 'the faith-based approach gives Jotay a stronger sense of purpose and identity.' Another highlighted that they all had a common approach of working closely with local organisations, especially with indigenous organisations. However, another interviewee highlighted the 'quite strong different institutional culture' of the E8 agencies amongst each other, which hampered the building of a collective identity. A third interviewee expressed quite clearly the limitations of Jotay's identity: 'Is Jotay driven by collective management and cooperation, or by a joint theory of change?'

However there remains an aspiration to create an independent identity for Jotay: 'We came together, and then we rationalised, so that Jotay projects are no longer agency related, but this has not yet been fully resolved so that Jotay is its own agency.' Equally, there is a feeling that 'we ought to be doing more Jotay-type collaboration [amongst the E8 agencies]'.

Evolution of Jotay

Conversations about a joint action in Central America, or a joint regional project, began in 2015. The first MoU, setting out to guide a collaboration, was drafted in late 2016. As one interviewee said: 'We spent a year discussing differences, rather than similarities. Once we decided to go ahead in those areas in which we have complementarity, we advanced much more.'

The MoU was inspired by mutuality and cooperation. It calls on collaborating agencies to take a solutions-focused approach. Indeed, the method of working together was commented on by two interviewees as reflecting great mutual respect: 'I have seen lots of bigger fights [when other organisations are collaborating], while in Jotay people are quite civil,' and 'one of the biggest successes is unifying our work together with five different agencies by creating one system'.

Nonetheless, collaboration has not been easy. Many interviewees commented that each of the participating E8 agencies have 'their own interests', and that this often resulted in extensive and time-consuming work when trying to agree common ground. When set out in an MoU, the modalities of collaboration seem sensible and achievable, but the devil was in the detail: 'The intention was good, but in practice, the difficulties started.' One partner

interviewee also referred to the fact that ‘with the previous coordinator it was difficult to identify what the model was going to be.’

Many interviewees, and particularly those from partner organisations, highlighted the democratic and transparent process of developing the joint programme. They applied this both to the original process in 2016, and to the process of developing the current strategic plan. As one partner put it: ‘Jotay was much more coherent [than other experiences of joint programming], with everyone going along together, even when difficult.’ Partners felt included in planning: ‘We were involved in the development of the strategic plan, and we put our concerns into it, especially in terms of land rights, which was really important to us.’ During 2019, when an advocacy strategy was developed, the strategic plan was reviewed and new reporting formats introduced, partners said they began to feel part of the process, possibly more than at the start.

Achievements

According to the original MoU, the formation of Jotay had the following objectives:

1. To develop a rooted joint country program in Guatemala based on a common vision of the cooperating agencies expressed in a strategic plan to be prepared during the first year.
2. To establish an effective and robust cooperation mechanism that:
 - a. gives direction on policy matters;
 - b. facilitates a clear governance and management structure;
 - c. ensures joint ownership and common identity that, at the same time, recognises the priorities of the cooperating agencies.
3. To enable the most efficient and effective use of resources and to raise increased funds in such a way as to contribute to sustainable changes with the greatest possible impact.
4. To add value through synergies, efficiencies, greater inter-agency understanding and the removal of duplication.

The mid-term review, completed in mid-2019, had assessed progress towards these objectives. While it outlined a number of successful areas, at that point the overall findings were such that the future of Jotay was far from certain. This doubt related to the difficulties of joint working, including finding common

Summary of Jotay’s operational achievements (2017–2020)

- In 2017–2018, formulation of the first strategic plan, and its presentation to partner organisations.
- In 2018, start of implementation of the Rule of Law Meta Project; progress on the harmonisation of formats for formulating proposals and reporting.
- Also in 2018, start of implementation of the Natural Assets Meta Project. Progress was made in the formulation of four strategic objectives and cross-cutting areas to be applied to all projects.
- In 2019, focus on team building (assignment of strategic objectives, reassignment of cross-cutting areas: PME, development of an advocacy and communications strategy, fund management and redistribution of the partner portfolio. The accounting administrative system was defined and reports were prepared for the framework project (by strategic objective), an electronic bulletin was published and proposals for fund management were prepared.
- In 2020, review of Natural Assets Meta project (Strategic Objective 2) and Rule of Law Meta Project (Strategic Objective 3), and the 2019 annual report was developed. Adaptations needed to be made due to the COVID-19 pandemic, which had a direct impact on the results achieved for the year.

solutions on programme, administrative, financial and human resources issues, as well as the difficulties of accounting for the responsibilities of and risks to the host agency. However, responses from interviewees during this learning review carried out a year later pointed to a number of areas where progress has been made since the mid-term review delivered its findings. There was a general sense that Jotay had consolidated its journey and its future was more secure. Interviewees highlighted a series of significant achievements both for Jotay as a joint programme, and in terms of delivering results.

Joint programming

The following organisational achievements provide evidence that Jotay was becoming an increasingly effective delivery mechanism for a joint strategy:

- Development of a strong programme strategy, clearly reflecting the priorities and concerns of the E8 agencies and finding significant common ground.⁶
- Establishment of a professional team with extensive experience, a strong commitment and a horizontal management structure.
- Participatory development of a joint advocacy strategy, which reflects both E8 agency and partner priorities, and which sets out objectives and strategies for joint working towards them.
- The development of appropriate reporting formats and financial systems, while also conforming to the structures of the host agency.
- Joint programme budgeting, with some of the E8 agencies (BftW, Act CoS and NCA) managing their entire portfolio budget in Guatemala through Jotay; the distinction between projects as 'belonging to' certain E8 agencies is diminishing: 'In 2020 we no longer tell partners which agency the money is coming from and we no longer have to work with different currencies.'
- A European Union contract funding programme is implemented through Jotay, and includes three new partners, and a second European Union funding opportunity is pursued with three Jotay partners.
- Greater collaboration between Jotay partners, with the development of common positions on the rights of indigenous peoples and women (mentioned by La Comisión Paz y Ecología (COPAE)), water resources (mentioned by Asociación Grupo Integral de Mujeres Sanjuanera (AGIMS)), transition to a just green energy strategy (mentioned by NCA) and sustainability and sensitivity to conflict (mentioned in the 2019 annual report).

Delivering results

Many interviewees also mentioned Jotay's outward-facing achievements, highlighting results that included:

- A growing visibility of and respect for Jotay in Guatemalan civil society, reflected by growing engagement of Jotay partners with religious leaders, and by Jotay taking the role of temporary secretariat for the Forum of international NGO organisations in Guatemala (FONGI).

- A stronger civil society advocacy voice, linking Guatemalan and European advocates. Jotay, in coordination with E8 agency headquarters in Europe and FONGI, lobbied against the government's new NGO law and other regressive legal proposals and lobbied for CSO expertise and advice to be taken into account in the government's Covid-19 response.
- Joint advocacy initiatives (meetings with parliamentarians, ministers and representatives of the legislature) on budgeting for services for survivors of gender-based violence (GBV) and land rights were undertaken by Jotay partners AGIMS and Grupo Guatemalteca de Mujeres (GGM).
- Increased capacity to reach more primary stakeholders, as duplication between agencies is reduced and resources can be better focused. AGIMS, a partner agency, also confirmed that 'we get greater funding, so we can provide more support for more women'.

Some results related to how Jotay's partners felt they had been strengthened by the programme:

- Benefiting from the expertise of other Jotay partners, for example ICEFI's expertise in research and advocacy, leading to greater opportunities to 'see the problems at the national level, not only at the local level'.
- Benefiting from expertise brought into Jotay through wider regional partnerships, such as with the Jesuit Network for Migrants, called the Escola Superior de Teologia in São Leopoldo, Brazil (training in feminist theology) and Claves from Uruguay (working with faith-based organisations to use methods against violence against children).
- Greater international linkages, which provide more advocacy opportunities, for example in the areas of tax justice, democratisation and the role of NGOs in Guatemalan society.
- Greater financial stability and access to funds. Partners can maintain their relationship and funding from Jotay even if individual E8 agencies depart from it. So, as Christian Aid prepares to leave, many of the partners it brought into Jotay could still continue to receive funding.

Project results

It is worth noting that in the interviews, when asked what results Jotay had achieved, most interviewees did not mention the impact or results of projects, but focused more on results relating to Jotay as a delivery mechanism. Nonetheless, the 2019 annual

report lists results that were achieved through projects implemented by the individual partners.

- 31,526 people (63% women) from 227 communities in 17 departments benefited in some way from Jotay programming.
- 1,751 women participated in governance processes including training, exchange of experiences, and forums presenting proposals from municipal candidates, spread out across a number of projects implemented by a range of partners. In addition, 108 men and 132 women spoke up in three assemblies on the fight for land rights.
- 327 women were in or were elected to leadership positions in local decision-making spaces related to project delivery.
- More than 800 female victims of gender-based violence, young and old, have received support of various kinds.
- In Quiché, hard work to influence a health service provider resulted in improved access to services for indigenous women and recognition of the work of traditional birth attendants and midwives.
- 629 families diversified their food consumption.
- 166 families increased their income from the sale of agricultural produce at local markets.
- 53 communities were involved in initiatives to protect water and forest resources.
- 110 communities were involved in building a hydro-electric micro-dam to provide their families with renewable electricity.
- The Instituto Centroamericano de Estudios Fiscales (ICEFI) launched a campaign to question the government's 2020 budget, which contributed to wider critiques; ultimately, the budget was not approved by Congress.
- Compensation was paid to 74 survivors (50 women and 24 men) of the Río Negro massacres, within the framework of a ruling by the Inter-American Commission on Human Rights.
- In 2019, as a result of the pressure and lobbying of social organisations with a presence in the municipalities, a budget was allocated towards the implementation of the Municipal Youth Policies of Chiantla (Q500,000.00) and Aguacatán (Q125,000.00).
- Greater visibility and influence was achieved for the Mayan Peoples Council, through information technology and communications support from Jotay projects. This strengthened their ability to generate debate and opinion through press conferences, framing key political issues in

relation to indigenous peoples, including: the 'plurinational state', the results of the 2019 general elections, the signing of the 'safe third country' agreement, and the results of the 2018 census.

- Training in Core Humanitarian Standards and drafting of emergency preparedness and response plans increased preparedness of ACT agencies and other partners to respond to humanitarian crises.

Challenges and limitations

Focus on governance and administration hampers programme delivery

Although the original MoU set out a clear path for the joint programme, there were many unanticipated challenges in finding agreement between the E8 agencies on emerging governance, administration and finance issues. The 'build as you go' approach also brought disadvantages for the people involved, as issues constantly arose and needed to be resolved, taking much time. As one interviewee reflected, so much time is spent on governance and organisational problem-solving, that the programme itself comes up short: 'The dynamics of Jotay is one of construction: everything is constantly in flux, so as a result, the governance⁷ ... has no time to think of the programme itself. We respond to practical demands of project management, rather than focusing on learning.' The fact that developing the Jotay governance, systems and structures has taken most of the joint programming effort during the pilot was to be expected, given the newness of the joint programming approach and the differences between the E8 agencies and amongst partners. It does, however, highlight the need to weigh up the benefits of joint programming against the 'cost' of setting it up.

Some interviewees also raised the tensions that could develop from working for two 'masters' – the E8 agency and Jotay. More emphasis on building the Jotay team could make working relationships smoother and more effective.

Although Jotay aspired to save money by collaborating, one interviewee suggested that 'there is too much funding stuck in the agencies, rather than reaching beneficiaries.... We have too much bureaucracy to implement the theory of change well.' There may be room for improvement here to ensure that the systems and structures of Jotay require proportionally less funding, and the projects receive proportionally more funding.

When asked about challenges of the Jotay programme, most partner interviewees referred to

contextual challenges rather than challenges in achieving the programme objectives. All interviewees agreed that while the programme areas are very suited to the context, progress on each had not been as hoped because of contextual challenges on human rights, in particular the rights of women and indigenous peoples.

'We lack enough time together to deepen discussions with the other organisations and formulate our work better. Each organisation wants to articulate things in their own way, rather than seeking to articulate a common approach,' one partner interviewee said. Perhaps, given these significant contextual challenges, more programme focus could be placed on reflection and identifying the best possible strategies for achieving change.

Common systems are necessary

All interviewees appreciated the development of a Jotay strategic plan, with an accompanying results framework, which is making it much easier to bring together the results of the different work of partners into one view. But there was also recognition, despite progress towards a common reporting format and partnership agreement, that the different E8 agencies were still using different planning processes with 'their' partners.

Interviewees were not uniformly convinced that adopting the LWF project management approach for Jotay's PME systems was the right thing for the programme, instead of developing a Jotay-specific PME system. For example, while there were good reasons to adopt the LWF project management approach, it was recognised that it was developed for a direct implementation management approach. This, according to one interviewee, involves 'close follow up with partners, month by month. But in Jotay, micro-management is not the way of working. So LWF formats and procedures are not completely appropriate.' Jotay is based on a more relationship-based partnership model, rather than on a supervision model of working and that may require a different PME system, with less focus on monitoring of activities and more focus on results and reflection. In addition, the LWF formats didn't leave much room for programme officers and partners to apply an adaptive programming approach, which involves testing their strategies, adapting their activities during implementation, innovating, and finding the most effective way to respond to the ever-changing needs of the target population.

Equally, agreement on financial systems has been difficult to achieve. Some interviewees (both partner organisations and E8 agencies) pointed out difficulties related to managing budgets in different currencies, with different budgeting percentages required by different E8 agencies, and to problems with slow disbursement, which hampered implementation. When brought in to help build the right system, external consultants proposed a new unified financial structure quite different from the LWF systems, but compatible with them, under which Jotay would be treated within the LWF system as a variant of a country programme. However, current discussions seem to be leading towards a closer alignment with LWF systems, though E8 agency interviewees mention that 'flexibility' or 'adjustments' must be maintained.

The above financial system is unlikely to apply during a humanitarian response. It is less likely that joint programming will allow for the dissolution of the direct ties between a humanitarian project and the E8 agency, because of the specific reporting and accountability requirements often accompanying these funding sources, which often come from public disaster response appeal mechanisms.

Linking local to global advocacy

A challenge in building a joint advocacy strategy was bringing in the policy, advocacy and campaigning capacity of the E8 agencies in Europe to capitalise on the lobbying potential in Europe. As one interviewee said: 'Guatemala is just one country, so it's hard to get the headquarters to prioritise and put time into delivering on the Jotay advocacy objectives. Even if a theme coming out of Guatemala might coincide with the line of work in [headquarters], this doesn't mean that they will be able to free up staff time to work on what we want to do.'

Conflicting priorities between the E8 agencies

The different organisational priorities of the E8 agencies present a challenge to the Jotay approach. ICCO exited from Jotay because Jotay's lack of focus on economic and private sector development, one of ICCO's priorities, meant that the work no longer felt adequately aligned with ICCO's strategic direction. Christian Aid's exit due to its own organisational restructuring is another such example. This type of challenge was anticipated, and the original MoU includes modalities for disengagement, which have been applied to Christian Aid's exit, ensuring a relatively smooth transition.

2. Christian Aid's role in and contribution to Jotay

Ambitions, added value and readiness for change

Christian Aid's expectations from the Jotay programme were no different to those from its E8 partner agencies. At director level, there was a strong commitment to GOAT, and to increasing impact, effectiveness and efficiency through collaboration at country level. Christian Aid had also been working in an environment where country-level investment was to be kept as minimal as possible, and Jotay seemed like a suitable response to that pressure.

Jotay's achievements provide evidence that the investment made by Christian Aid in the joint programme was worth it. It involved a significant time commitment and some diplomatic efforts by a number of Christian Aid staff: Andrew Croggon, Moises González, Alexis Moncada, Ana Arellano and Nathalie Mercier were all mentioned by non-Christian Aid interviewees. Both Christian Aid interviewees, Moises Gonzalez and Nathalie Mercier, outlined some of the difficulties they encountered along the way. However, both remained positive and convinced that working through Jotay was better than working as individual E8 agencies, each with bilateral relationships with partners. This in itself should be a strong learning point for Christian Aid country programmes in other locations where more than two E8 agencies are working alongside each other.

However, the joint programming process has highlighted a particular challenge for Christian Aid, namely that its organisational culture and way of working is different to that of the other E8 Jotay agencies, which are quite similar amongst themselves. Christian Aid systems and approaches are less compliance-focused and more flexible, adapting to the various needs of different partners or projects, though like the other E8 agencies, they sometimes include additional 'back-donor' requirements from funders. This difference has made finding a common path for a joint programme that includes Christian Aid slightly more difficult. The fact that so much progress on Jotay has been made highlights both the extraordinary commitment by Christian Aid staff to the joint programme, but also the openness of the other E8 agencies to work with an agency that has a slightly different model.

A number of interviewees – including those from Christian Aid – mentioned their regret in seeing Christian Aid leave Jotay, just when the benefits of years of hard work setting up the structure and systems are bearing fruit.

Adaptive programming approach

A specific contribution that Christian Aid has made to Jotay, which was mentioned by a number of interviewees, was its introduction of an adaptive programming approach. This approach was developed under the Irish Aid funded programme in 2016, and has been applied to its Guatemala work as part of that contract. However, the general Jotay programme management approach agreed in the MoU and PME framework was traditional and based on a log frame.

Based on its experience from its Irish Aid funded programme, Christian Aid encouraged the use of adaptive management methodologies where this seemed possible, such as for ongoing strategy testing and regular revision of theories of change to quickly identify what worked and how to achieve outcomes more effectively. By 2020, partners originally introduced by BftW and NCA were also using adaptive programming where appropriate, as well as those originally affiliated to Christian Aid. As one partner interviewed said: 'Moving to a flexible framework allowed us to convert ourselves into an active agent of change.'

Both Christian Aid interviewees pointed out that Jotay had effectively improved partner financial sustainability by creating new partnership opportunities within the joint programme, and that this has made the Christian Aid exit easier. They hoped that most of the partners that Christian Aid had brought into Jotay will continue to work in the programme.

Expectations and hope for the future

None of the persons interviewed felt that it would be right to close down Jotay, despite the departure of a few of its members, including Christian Aid – even though this option was a very live one after the mid-term review was completed in March 2019.

By the time Christian Aid leaves Guatemala at the end of 2021, a new MoU will have been signed, setting out more clearly the roles, responsibilities, risks and cost sharing of all the participating E8 agencies, and their contribution to the long-term stability of the joint programme. The new strategic plan is in place and fundraising and advocacy strategies have been agreed.

Christian Aid's commitment to continue to help Jotay meet its costs until 2021 is a significant support to the transition period, and will go a long way to ensuring

Jotay's success in the long-term. Most of the interviewees expressed a level of gratitude for Christian Aid's contribution to Jotay so far. Jotay member expectations have been well managed by the Christian Aid staff and management involved in the difficult decision of closing the Guatemala programme. Because Christian Aid and the other E8 agencies have stayed true to a participatory approach in the formation and decision-making around Jotay, the partners introduced by Christian Aid feel they have a stake in Jotay and are willing to continue working within the joint programme. Most of the interviewees expressed a level of gratitude for Christian Aid's contribution to Jotay so far. The long

close-out period (from the announcement in mid-2019 to the end of 2021) has helped to make the transition easier.

The partners that Christian Aid brought into the joint programme are now benefiting from seeing their funding opportunities extended through continued participation in delivering on the expected outcomes of the Jotay strategic plan. This is not a guarantee for funding, and to date not all Christian Aid partners have been included in future funding plans, so there is an expectation that Christian Aid will continue to explore options around this with the other E8 agencies over the next year.

3. What does partnership look like in a joint programme?

Relationships between ACT agencies in Jotay

The Jotay partnership model takes advantage of the fact that LWF is the implementing arm of the Lutheran donor agencies, and therefore quite suited to be the host agency. This did mean that the relationship between the Lutheran host agency and Christian Aid and NCA, both of which are ecumenical and not Lutheran agencies, was also on slightly different terms than the other Lutheran agencies, BftW and Act CoS. However these differences did not seem to excessively hamper the formation of the joint programme.

As host agency, LWF also provided more administrative support than the other E8 agencies, including on internal audits, and ensured more of the operational requirements of the joint programme. As mentioned, this also resulted in greater responsibilities and risk for LWF. An important sticking point was around agreeing how to balance this financially and in terms of risk management. Current negotiations for the next MoU aim to resolve this.

The ideal Jotay partnership model may be for Jotay to represent all of an E8 agency's programme in one country. For example, for BftW and NCA, the programme officer's portfolio included only Jotay projects, while the Christian Aid programme officer's portfolio also included coordinating Irish Aid's programme grant to Christian Aid. Although the partners in this portfolio were also partners in Jotay, not all their Irish Aid-funded work has been delivered within the Jotay framework, as some of this work pre-dated the establishment of Jotay and did not fit within the strategic priorities of the programme.

Opportunities and challenges of partnership

As Jotay established itself, there was an active move to create a partnership between Jotay and the Guatemalan partner organisations, rather than retaining the partnership with the E8 agency that had

brought the partner into the portfolio. By 2020, this process was well advanced, and all partners interviewed confirmed that they identified their relationship as being with Jotay, instead of with the E8 agency. Some peculiarities remain though, such as that of Christian Aid partners implementing some projects within and some outside of Jotay (as described above).

Most partners interviewed highlighted the advantages of the new relationship model, citing greater financial stability, working with fewer reporting formats, greater access to wider technical expertise in the various E8 agencies, and greater access to European advocacy allies and networks. No partners implied that the bilateral model was better, even when recognising that there had been difficulties in negotiating and finalising the joint programme approach. All partners appreciated the development of one PME system and working in one currency.

Despite the advantages identified by the partner organisations, some E8 agency interviewees felt that the emphasis on 'making it work' between the E8 agencies throughout the whole process had meant that Jotay had not adequately focused on supporting the partner organisations themselves. They felt that E8 agencies had not adequately facilitated access to funds or support, and there might have been too much emphasis on results. This was not, however, mentioned in the partner interviews.

Ultimately, the Jotay model probably did not help to shift power from the E8 agencies to partners, in the spirit of localisation. While this question wasn't explicitly explored in the interviews, the emphasis on processes and systems in Jotay provided the overall impression that it has more than likely served to keep the balance of power within the E8 agencies, with partners maintaining their primary role as implementors of Jotay's strategies, even if they were involved in their development. As the partnership model evolves in line with wider development sector thinking, shifting greater power to local partners may be something to consider making one of Jotay's objectives, and working towards.

4. What we can learn from Jotay?

People are key to success

Establishing a joint programme depends not only on the right structures, systems and strategies – it depends significantly on the people involved. A number of interviewees mentioned the challenges of bringing the Jotay team together, given that they were from different agencies, and worked in different organisational cultures. Building a team in this way demands a focus on team building and creating and maintaining positive working relationships.

Many references were made by interviewees to people who either catalysed and facilitated the joint programme development or who hindered it, by virtue of their approach, technical limitations or even personality. Who the people are is important and influences the outcome of the joint programming journey. Naturally, this is a difficult aspect to manage, as often a programme will be built by people already in certain roles, and whose mandate is expanded to include the creation and management of a joint programme. However, when recruiting people to roles in relation to a joint programme, whether at governance level or at programme level, seeking people who display flexibility, capacity to work in partnership and strong communication skills seems important.

While a few interviewees mentioned that Jotay's first coordinator was not the right person for the job, other interviewees highlighted the specific efforts and contributions made by individuals from the partner agencies, and also that there was E8 leadership support for Jotay. One interviewee said: 'What gave me hope was there was real buy-in from the E8 directors in Europe, the political will and the commitment by the people who were in the positions of regional directors.'

Maintain space for adaptation and innovation

'So far, Jotay's approach is quite conservative. There is some fear of innovation, of stepping outside our comfort zone,' one interviewee said. Despite this, many of the thematic areas in Jotay's programme strategy would benefit from an adaptive approach, as the theories of change for governance and human rights programmes are particularly vulnerable to contextual challenges that they cannot control, and are defined by complex system interactions (political, economic, social, cultural). Some Jotay programme officers, especially those

who have experience of using adaptive approaches in non-Jotay programming, would be keen to apply an adaptive approach to the joint programme, which tests the strategies adopted against results achieved on an ongoing basis and regularly makes adjustments.

Focus on flexibility, agility and being open to alternatives

One interviewee who had been there from the start of the process said: 'If I were to do this again, I would like to take a more agile approach, to be more trusting in the other organisations, and spend more time on areas in which we can build.' Learning from the Jotay experience suggests the value of being as flexible as possible, using a 'minimum standards' approach to compliance where possible, rather than trying to make sure everyone's requirements are met all the time. If different agencies had additional compliance requirements, these could be met where needed, but with additional resources.

In considering creating joint programmes in other places, one question to ask is whether there is an effective maximum number of joint programme agencies. Could it be that a joint programme between four E8 agencies is more viable than a joint programme between six? Given the individual identity and culture of each of the E8 agencies, finding consensus, even on minimum standards, may be easier with fewer participants.

Build on its faith-based members and links

All E8 agencies are faith-based organisations, and there is a recognition in the strategic plan that working with religious leaders through faith-based partners provides opportunities for leveraging change. However, the faith-based aspect of Jotay is not particularly strong; only five partner organisations in Jotay are currently faith-based organisations. While one interviewee (E8 agency) suggested that there is no real faith-based strategy in Jotay, another interviewee (partner) highlighted the faith-based nature of all the E8 agencies.

Jotay is sensitive to this potential discrepancy and wants to take advantage of its faith-based links. As one interviewee said: 'Most progressive religious actors are already saying that it is unusual to see a faith-based programme that focuses on these sticky issues [like gender justice and human rights.]' Some

interviewees also wanted to see the faith-based aspect of the programme grow. This could be done by bringing more faith-based partners into Jotay, but this would also require greater theological support to the programme team. One interviewee also

recognised that working in the space between being a faith-based organisation and being an NGO is challenging as there is a duality that creates problems because 'a technical approach and a pastoral approach have different dynamics.'

5. Celebrating achievements and considerations for the future

In its short life, Jotay has already set down a marker of achievement. Recognising the complex nature of results expected in a programme focused on human rights, there have been some significant steps towards seeing systemic change that will sustainably benefit the programme's target groups. The 2019 annual report states that 31,526 people (63% women) from 227 communities and in 17 departments benefited in some way from Jotay programming. This includes people whose immediate and long-term needs were met by the programme, for example through supporting health service needs for GBV survivors, nutritional needs for families with very insecure food production, and people's need to be able to participate in decisions that directly affect their lives.

In all these areas, Jotay made gains. In addition, by tackling some of the most difficult human rights issues, revolving around compensation for past atrocities, or around current exclusion of indigenous communities, or gender-equitable fiscal policies, many people will have benefited indirectly, with many more standing to benefit as Jotay completes its current strategic cycle, deepening the changes it has affected.

There have also been some lessons to take forward for future joint programming initiatives with the ACT Alliance or in other similar situations. Some of these are outlined below.

Jotay's identity and organisational development

There was great variation in how the interviewees responded to questions around the identity of Jotay. For some Jotay was a means to an end, while for others Jotay embodied an aspiration to become a unique voice in Guatemalan civil society, and an entity in itself (see the 'Jotay structure and identity' section above for further detail). There is a clear sense that Jotay is different from a classic consortium of agencies delivering a common programme, and most of the collective energy has been invested in the practicalities of delivering joint programming, but does the commitment to working together stretch beyond the joint strategy?

Will Jotay become an actor in its own right, and will results achieved by the partners in their projects be Jotay's results, or will Jotay remain a delivery mechanism for a joint strategy between E8 agencies and multiple partner organisations in the country? How this question is resolved is also linked to Jotay's eventual governance model. Options being discussed

include Jotay becoming an independent localised entity in Guatemala, an 'LWF country programme', or an affiliate of the LWF Central America programme.

When talking about Jotay's achievements, none of the interviewees talked about results from the joint programme's projects. Instead, they all talked about Jotay's organisational development and its role as a civil society actor. So far, Jotay is seen more as a delivery mechanism rather than as an entity that brings about positive social change. Moving forward, a greater focus on the results achieved by the joint programme, as reported on annually, would help highlight the greater value that the joint programme brings.

Strengthen the faith-based focus of the joint programme

Emerging from faith-based origins, Jotay is building on the opportunities that working with faith-based actors brings with it. Some of these are also written into the strategic plan, in particular into Objectives 1 and 3. However, this review, as well as the 2019 annual report, highlights the fact that only a few of the partner agencies in Jotay are faith-based organisations, and that the theological underpinnings of the programme, and its application, is relatively weak.

This aspect could be focused on whenever a joint programme is created and implemented between any of the E8 agencies. For example, the number of faith-based partners in partner portfolio reviews could be increased, and additional support provided to Jotay staff to understand the role of theology as the basis that moves the action of religious leaders.

Refine the programme monitoring and evaluation system

Developing an appropriate PME system for a programme is a very important part of making it work. This has been a difficult process for Jotay. A first attempt by an external consultant didn't provide acceptable methodologies and tools and was rejected by the Jotay team. The LWF host agency's PME system was designed for an implementing agency, while Jotay is based on a partnership or accompaniment approach. Using LWF formats felt like micro-management to Jotay programme officers, and this also did not work. A third option, using formats developed to cover all requirements of all the E8 agencies,⁸ also did not work, as the formats were seen as cumbersome and did not have enough flexibility to adapt to Jotay's particular programme.

Discussions around the follow-up MoU have led to agreement to the use of LWF systems for PME, administration, HR and finance, but with some adjustments. As the reviewer, I was not able to look into these adjustments, but it seems to me that the most important adjustment that would need to be made is to adapt the systems to a 'partnership model', where project management and implementation are carried out by Jotay partners. The LWF systems were developed for an 'implementation model', where management and implementation are carried out by LWF directly. This shift could have many significant implications, such as avoiding monthly narrative reporting cycles requiring partners to report on progress on activities, and instead focusing more on results, possibly at a quarterly or biannual pace.⁹ In terms of risk management, a partnership model would be more likely to link disbursement of funding tranches to successful reflection cycles than to completion of activities.

For any future joint programming it might be a better option to adopt a 'minimum standards' approach, where the system requirements are kept to only those without which a project cannot be managed effectively and with mitigated risk. If additional requirements associated with specific donor requirements, or with best practice, are needed by one or more of the E8 agencies, then they should be able to request these specifically for the part of the programme that they are carrying the risk for, or that they are directly funding. If this requires significantly more effort, additional funding for any additional staff time, training, data collection or analysis processes should be provided by the relevant agency.

If a future joint programme includes governance, human rights or gender justice programming, it might also be of benefit to ensure that the PME system promotes an adaptive approach, which can be a significant contributor to more effective programme delivery on these themes in complex contexts. At the very least, an adaptive approach would facilitate more flexible collaboration if it were agreed by the E8 agencies as an acceptable way of working.

Promote more joint action between partners

Jotay's partner organisations see the stronger relationships between the partners of each strategic objective as one of its greatest values. This enables partners to exchange information and potential joint actions to be recognised and identified. It also leads to capacity building. The development of joint positions, say on energy transition, on rights of indigenous people or GBV survivors, or on conflict transformation has led to

important contributions to national debates by Jotay partners. This is something that can be increased and made a more central part of the programme – it was also one of the lessons reported in the 2019 annual report.

In addition, as mentioned above, future joint programming focused on working in partnership might involve setting objectives that aim to shift power from E8 agencies to partners, particularly if the E8 agencies aspire to support the localisation agenda and to decolonise aid.

Amplify advocacy campaigns through a joint programme

The opportunities that a joint programme opens up in terms of amplifying Guatemalan advocacy through strong collaboration is important, despite the challenges mentioned by interviewees in this review in terms of engaging policy and campaigns staff in E8 agencies on Guatemalan advocacy campaigns. There is clearly an important benefit in activating European voices and accessing European organisations and governments alongside and complementary to Guatemalan voices targeting stakeholders in Guatemala. More than one partner interviewee mentioned the importance of being able to leverage pressure from more European countries onto the Guatemalan government. This benefit should accrue wherever a joint programme is built that strategically links European and national advocacy campaigns.

Recognise the limitations of joint programming

The Jotay programme shows that a joint programme can work, although it also provides evidence of how much effort and time it requires. It seems that one of the challenges faced in this joint programme may have been the relatively large number of E8 agencies coming together, and the fact that, although the external focus of their work was very similar (faith-based, rights-focused, partnership approach), there were also significant cultural and organisational differences between the agencies. This is not surprising and may well be reproduced in other similar attempts at creating joint programmes.

A lesson emerging from the Jotay experience is that if the agencies are dissimilar in culture and organisation, then the number of agencies coming together should be limited. The Jotay experience suggests that up to four agencies, even with somewhat different cultures could successfully find enough common ground to 'make it work', but that including more E8 agencies, especially when they bring different operational models, might have costs that outweigh the benefits.

End notes

¹ ACTuando Juntos means 'acting together' in Spanish, and Jotay means 'rebirth, sprout or regeneration of life' in Guatemalan indigenous languages.

² Full list of staff and partners interviewed for this review: Moises Gonzalez, Christian Aid – member of the CCC and the SB of Jotay; Aracely Arévalo and Lissette Vasquez, Fundación Myrna Mack – Jotay partners, introduced by BftW; Alejandro Aguirre Batres, CONGCOOP – Jotay partner, introduced by Christian Aid; Hermilo Soto, Jotay coordinator – employed through LWF; Flory yax Tiu, NCA – Jotay programme officer; Michael French, LWF – member of the SB of Jotay; Nathalie Mercier, Christian Aid – Jotay programme officer; Inés Bustamante Antezana, Act Church of Sweden – member of the CCC of Jotay; Johanna van Strien, BftW – Jotay programme officer; Udiel Miranda, COPAE – Jotay partner, introduced by Christian Aid, NCA, BftW and Act CoS; Esperanza Tubac, AGIMS – Jotay partner, introduced by NCA

³ Key documents included the original memorandum of understanding (MoU) for 2017–2019, the strategic plan developed in 2018, the advocacy strategy developed in 2019, the mid-term review from 2019, annual action plans for 2019 and 2020, the 2019 annual report, the budget for 2020–2022, and the interim MoU for 2020.

⁴ A partnership-based approach is characterised by a relationship between two organisations, one usually being a funding agency, often in the global north, and the other being an organisation or agency based in the country of work, whereby the funding agency funds or otherwise supports the work of the local organisation towards a mutually agreed outcome. This is in contrast with an implementing approach, whereby the funding agency carries out the work themselves, with their own staff, systems and structures in the country of work. Christian Aid generally tries to adopt a partnership-based approach in its work where possible.

⁵ This is summarised from E8 GOAT minutes, 11/11/16, and an email from Paul Valentin, International Director Christian Aid, 24/11/16.

⁶ Nonetheless, one reason for ICCO's departure from Jotay was a lack of focus on economic and private sector development, one of its priorities.

⁷ This refers to the governance structure of Supervisory Board (SB) and Cooperation and Coordination Committee (CCC).

⁸ One of the objectives of the GOAT Initiative was to try to develop common formats for managing a partnership, so that collaboration between E8 agencies when working with partners would be facilitated. The SPRING project did develop such formats, but ultimately, they were not adopted as a good model to use as they were designed to meet the needs of all E8 members at once, making them very complicated and cumbersome.

⁹ It is useful to distinguish between narrative and financial reporting cycles – for the latter, a monthly reporting cycle is appropriate, in line with professional practice and helps to manage risk. Submission of monthly financial reports need not however require the programmes to report against objectives at the same time.

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