



## **APPOINTING A PARTNERSHIP BROKER**

Some guidance for those involved in defining the role, making the appointment and assessing performance



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As part of our commitment to raising awareness and setting standards in this field, we make this material freely available. Our only requirement is that whenever it is used (whether in whole, part or adapted) it is always accompanied by a written acknowledgement of the source ['Partnership Brokers Association'] and a reference to the availability of the original at: [partnershipbrokers.org/appointing a broker](https://partnershipbrokers.org/appointing-a-broker)

## Introduction

This paper is designed to build confidence and capacity in those involved in appointing and assessing partnership brokers. It provides a step-by-step approach with prompts and questions for consideration. It is based on an earlier tool<sup>1</sup> that, at the time because partnership brokering was still in its infancy as a concept, was somewhat speculative. We have now been able to extend our thinking by drawing on the rich experiences of many people now working all over the world in a wide range of contexts in the partnership-brokering role. Having said that, we believe that the process of appointing, managing and assessing a partnership broker is still somewhat uncharted territory and therefore what we are sharing here is more 'guidance' than 'blueprint'.

Our experiences, both as practicing partnership brokers and in our roles as Directors of the Partnership Brokers Association, convince us that skilled partnerships brokering is critical to effective partnering. But having said that, it is important to sound a note of caution. The role of a partnership broker must always be kept in perspective – it is never a substitute for good partnering. It is always the partners themselves that are central to, and ultimately responsible for, making their partnership work. The best partnership brokers recognise this whole-heartedly and do their best to build confidence and partnering capability in the individuals, systems and organisations they work with.

We recommend that those involved in appointing and managing partnership brokers keep up to date with emerging knowledge and experience by taking a look at our publication that captures the insights and experience of partnerships brokers on the job<sup>2</sup> and accessing (and perhaps contributing to) the latest thinking and experience of partnership brokers in our peer-reviewed journal – *Betwixt & Between: The Journal of Partnership Brokering*<sup>3</sup>

We welcome feedback<sup>4</sup> – for example, what helped and what did not – as well as suggestions for improvements to this paper. Everything we do is always a 'work in progress'!

Ros Tennyson  
Bulbul Baksi

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<sup>1</sup> See Tennyson, R. *The Brokering Guidebook, Tools for Navigating the Partnering Process*, 2005, available from [thepartneringinitiative.org](http://thepartneringinitiative.org)

<sup>2</sup> *What do Partnership Brokers Do? An Enquiry into Practice* available from [partnershipbrokers.org/brokering](http://partnershipbrokers.org/brokering)

<sup>3</sup> Editor: Surinder Hundal – the journal is available from [partnershipbrokers.org/journal](http://partnershipbrokers.org/journal)

<sup>4</sup> [info@partnershipbrokers.org](mailto:info@partnershipbrokers.org)

## Why appoint a partnership broker?

Multi-stakeholder partnerships are often complicated and sometimes really complex. They critically depend on establishing strong working relationships and operational processes between individuals who often come from diverse backgrounds and with quite different values and opinions. It is not uncommon, as many have found to their cost and disappointment, for partnerships to fail to reach their goals and potential.

Meaningful collaboration can take considerable effort to establish and to nurture to maturity. It is a serious challenge to form strong and productive collaborative arrangements that work efficiently and effectively without being prohibitive in terms of risk and investment or involving unacceptable levels of compromise. **How** can a robust, resilient and constructive partnership be built? And, as importantly, **who** will be best placed to help the partners to build it?

Partnership brokers<sup>5</sup> (whether described this way or not) are increasingly seen as playing a critical part in effective multi-stakeholder collaboration. Partnership brokers take responsibility for:

- Building and maintaining productive working relationships between the partners
- Ensuring that the partnership is innovative, appropriate and efficient as well as
- Encouraging the partners to achieve optimal benefit and impact
- Maintaining a focus on sustainable outcomes

Partnership brokers have such a subtle but critical role in helping to grow and shape a partnership that, at their best, they can be seen as embodying a new model of leadership<sup>6</sup> with a range of non-traditional leadership attributes including:

- Ability to **span boundaries** through developing empathy with each partners' needs, desires and concerns
- Capacity to **hold space and help partners work through** complex, information-rich, rapidly moving, politically unstable and economically unequal contexts
- Skill at convening and **facilitating productive interaction** between diverse groups of people
- Willingness to **carry a level of risk** on behalf of, or for the benefit of, others
- Ability to **inspire others** with their vision of a more cooperative future
- Being **modest with regard to their own achievements** so that others are genuinely empowered

Looked at in this way, it becomes clear that this role is really important – perhaps critical – to partnering as a mechanism capable of tackling the world's big challenges.

*“As a partnership broker, I cannot solve all partnership challenges. In fact, it is important for me to involve partners in identifying challenges and to jointly discover strategies to confront disputes or break down barriers. Collectively the group has more expertise, ideas and resources. This isn't about me making a partnership succeed but enabling a set of partners to accomplish a common goal that they were not able to accomplish on their own. As a partnership broker I don't control the partnership, instead I do my best to nudge it when it shifts course or stalls. I ask the tough questions when others' attention is focused elsewhere.”*

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<sup>5</sup> This is not always the term used and we are aware that in some contexts it is inappropriate – alternative terms include: change agents, process managers or intermediaries

<sup>6</sup> Such leadership has been described as invisible leadership; servant leadership or facilitative leadership

## Questions to consider

### 1. Should the partnership broker be 'internal' or 'external'?

**Internal Brokers** are those who manage a partnering process from within one of the partner organisations (often, but not always, the organisation that took the lead in initiating the partnership). Tasks include:

- Preparing their organisation for collaboration in a multi-sector partnership – this might also include taking on an initiating or convening role within the partnership
- Negotiating and representing their organisation's involvement in a partnership
- Playing a key role in managing, developing and maintaining the partnership arrangements
- Spanning boundaries so that each partner can rely on her/him to be transparent, equitable, and work for benefit of the partnership alongside that of her/his specific organization

The most obvious risk for the internal broker is the risk of being (or perceived as being) too partial to their own organisation and therefore unable to be objective enough in helping partners make key decisions about the partnership.

**External Brokers** are those operating as independent professionals contracted either by one of the partner organisations or by the partnership itself usually to undertake specific tasks. Such responsibilities could include:

- Exploring the feasibility of adopting a partnership approach
- Facilitating negotiations to develop a partnership and / or a partnering agreement
- Maintaining or monitoring the effectiveness and / or added value of the partnership over time
- Building institutional capacity (of either the partner organisations or the partnership itself) to deliver effective programmes and sustainable outcomes
- Reviewing partnerships to enable it to respond to emerging needs and concerns
- Spanning boundaries so that each partner can rely on her/him to be transparent, equitable, and work for benefit of the partnership

For the external broker, the risk (actual or perceived) may be that they are too distant and have too little vested interest in the partnership's success to maintain their commitment when things get difficult.<sup>7</sup>

In any partnership there may be a case for a mixture of the two types of partnership broker. There are two critical points here: first, whether an external or an internal broker, partners need to clearly recognize the brokering role. So, even an internal partnership broker has to be 'appointed'. Second, the role/s of the broker/s have to be clearly defined. Internal brokers often have multiple roles. If the principal role is to coordinate, for example, then it should be assessed whether they also have the permission to take command of a situation when required, for the benefit of the partnership.

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<sup>7</sup> During the life of a partnership, it may become clear that at certain times an external broker is preferable, in which case those acting as internal brokers can step back into a different role (perhaps simply acting as a representative of their own organisation within the partnership). It is, in fact, not uncommon for individuals to move from being an internal to an external broker (or vice versa) as the requirements for the role change and / or their working relationship to the partnership metamorphoses over time. For example, an internal broker may be seconded to the partnership or an external broker may be employed by the partnership for a period of time.

## 2. Can the partnership-brokering role be carried by more than one person?

The answer to this question depends, to some extent at least, on the scale, complexity and ambition of the partnership. Some partnerships start with one broker and expand the role to incorporate others as needed. It is the case that over-reliance on one individual can make for serious levels of stress as they strive to fulfil a wide range of roles. It can also create undue dependency from the partners. Spreading the role too widely, however, can add unnecessary levels of confusion and be wasteful of resources.

Some solve this conundrum by creating a series of short to medium-term contracts with specific tasks and time-bound goals. Others solve it with a much more fluid approach where it is simply accepted that the role will transmute over time or that it will be shared between a number of different people (whether internal or external to the partnership) as appropriate.

Capacity strengthening is a critical part of partnership brokering. Partnership brokers share their responsibilities with partner representatives by building capacities among those who seem to have the basic attributes of good partnership brokers. Shared leadership is a characteristic of partnerships. Partnership brokers can be expected to model it when they broker.

## 3. What are the other considerations in making such an appointment?

Whether the appointment is of an internal or external broker and whether the broker is one person or the brokering role is shared, there are a number of questions to be asked in advance of making an appointment. These include:

- Should the broker be given a **reactive** or a **proactive** mandate?
- Over what **term** should the broker(s) be appointed?
- How will they be **line-managed** on a day-to-day basis?
- How far will the broker be expected to be **accountable** to the partners as a group?

All these – and any other key questions – should be discussed fully with potential / actual partners in advance of drawing up a role description and making an appointment.

## **Roles and responsibilities**

Quite often a partnership broker will be expected to take on a wide range of roles – whether by intuition, invitation or instruction – as it becomes clear what is needed for partnering to work in specific context and circumstances. These can include:

- **Seeding the idea** of partnering with potential partners, policy makers and / or donors – explaining how it can work and how it may be better than alternative approaches
- **Inspiring decision makers** to follow a multi-sector approach to their sustainable development efforts
- **Building active collaboration** between the partners themselves as well as between the partners, other stakeholders and external donors
- **Encouraging (and role modelling) good partnering behaviour** that will help the partnership to function effectively and creatively
- **Protecting the vision** and core principles of the partnership.

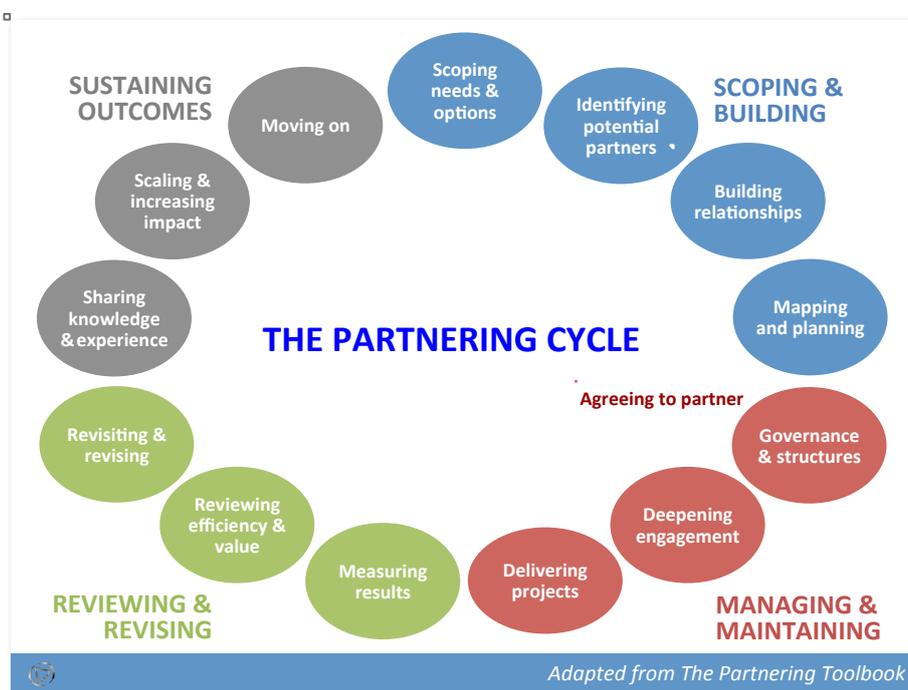
In any event – however broad the partnership brokering remit becomes – to be effective at any level, partnership brokers always need:

- **Recognition** and acceptance of their role by partners and key others
- **Engagement** in the form of active involvement with, and practical support from, partners
- **Clarity** in terms of their tasks and delivery timeframes
- **Supervision** – with appropriate management and appraisal procedures pre-agreed.

A good partnership broker works continuously to build capacity and systems within the partnership – thereby promoting healthy interdependence between the partners rather than partner dependence on the broker.

A really good partnership broker understands their role as important but temporary and they work intentionally to make themselves unnecessary.

When appointing a partnership broker it is important to have in mind the ‘life cycle’ of a partnership<sup>8</sup> (see below)...



... and to consider the ways in which partnership brokering is likely to evolve and change during this cycle<sup>9</sup> (see below).

<sup>8</sup> Adapted from *The Partnering Toolbook*, 2003, available (in several languages) from [thepartneringinitiative.org](http://thepartneringinitiative.org)

<sup>9</sup> Copyright: Partnership Brokers Association

<p><b>SUSTAINING OUTCOMES</b></p> <p><b>Exploring</b> moving on options and supporting decisions</p> <p><b>Managing</b> closure / moving on processes collaboratively</p> <p><b>Helping</b> partners celebrate and learn from their partnership 'story'</p> <p><b>Ensuring</b> outcomes are able to be sustained / embedded / scaled / transferred</p>	<p><b>SCOPING &amp; BUILDING</b></p> <p><b>Scoping</b> the partnership's potential</p> <p><b>Exploring</b> drivers, expectations and underlying interests</p> <p><b>Embedding</b> key partnering principles</p> <p><b>Enabling</b> partners to differentiate between their partnership and its projects</p> <p><b>Negotiating</b> a detailed agreement to underpin the partnership</p>
<p><b>REVIEWING &amp; REVISING</b></p> <p><b>Supporting</b> partners in reviewing added value and effectiveness</p> <p><b>Assisting</b> in revising the collaboration agreement</p> <p><b>Helping</b> partners implement changes needed to improve the partnership</p> <p><b>Guiding</b> partners to plan for sustaining outcomes and moving on</p>	<p><b>MANAGING &amp; MAINTAINING</b></p> <p><b>Co-creating</b> appropriate governance arrangements</p> <p><b>Helping</b> partners to work through complex internal and external challenges</p> <p><b>Building</b> partner capacities to strengthen and optimise the partnership</p> <p><b>Enabling</b> partners to explore new ways of transforming systems</p>

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## Creating a role description

Once a decision has been made on what type of partner / partnership broker relationship will suit the partnership best, it is advisable to draw up a detailed job description (see below).

### Template for a partnership broker's job description

1. Description of the partnership, its goals and its context
2. Key skills and competencies required in the role (see table below)
3. Outline of main activities and how they may change over time<sup>10</sup>
1. Refer to the Partnering Cycle and the changing role of the broker during each phase.
4. Timetable for completion of specific tasks<sup>11</sup>
5. Clarification of line management and accountability systems<sup>12</sup>
6. Details of assessment procedures
7. Terms and conditions of appointment including: annual salary (if employed) or fee (if self-employed) or terms of any pro-bono arrangement; duration of the contract / agreed period of work; entitlements (holiday, pension, expenses) and the conditions under which the contract can be changed or terminated by either party

Partnership brokering requires a specific set of skills as indicated in the table below:

<sup>10</sup> Useful to refer to the changing nature of the partnership brokering role around The Partnering Cycle – see page 7

<sup>11</sup> Assuming the partnership broker's role is seen as 'temporary' (the time commitment having been agreed in advance of the appointment), it is important to build in milestones and a timetable for the completion of specific tasks.

<sup>12</sup> Important to involve all partners in this

<b>SKILLS/COMPETENCIES</b>	<b>NOTES</b>
Confidence to hold space	To help partners work through complexities, intractable issues and ambiguities that have no immediate or defined answers.
Empathy	To practise active listening and understand diverse perspectives, desires and concerns of partners, and then process them through a partnership lens
Negotiation	To work through differences of opinions and values in a way that explores underlying interests and help partners develop empathy and understanding for each other's perspectives.
Facilitation	To promote relationship building on principles of equity, transparency, mutual benefit and embracing diversities. Difficult conversations are key to partnership building. Measured and skilled confrontation may also be required.
Synthesising information & record keeping	To manage and record complex data and layers of information and experience. Synthesizing discussions in partnerships entails developing a frame of reference that is consistent with that of the partners.
Articulation and Presentation	To communicate with precision and represent the nuances of a discussion or an issue. Partnership brokers have to understand and articulate the frames of reference used by the partners.
Coaching & capacity building	To build a brokering team and role model co-working, shared responsibility and collaborative decision-making. Ultimately, as a partnership progresses, the broker will transfer responsibilities to partners (or project staff). This involves stepping back from a front line role and working in the background to support and coach individual partners or staff in building their own partnering and brokering skills
Institution - building	To help increase the engagement of partner organisations as well as helping each organisation become more 'fit for purpose' in their partnering approach. Brokers will also need to help partners build governance and accountability procedures as the partnership itself becomes more 'institutionalised'.
Reviewing & Revising	Partnerships benefit from regular reviews to ensure that they remain animated and do not lose momentum. As someone with close knowledge of the partnership, the broker is uniquely placed to facilitate reviews themselves or, if they are seen as too close to the partnership to do this objectively enough, to brief someone else to facilitate the review on behalf of the partners. They may also have a critical role in revising the partnership based on experience.

Whatever skills and competencies a potential appointee does (or does not) possess, there are certain personal / professional qualities that will carry them a long way in their partnership-brokering role. These may ultimately be more important / valuable than specific professional skills. Such attributes include:

- Dedication to core partnering principles (equity, transparency, mutual benefit and embracing diversity)
- Ability to keep calm under pressure
- Trustworthiness by maintaining an independent and fair stance

For more information about this please see: *Partnership Broker's Profile – Brokering Archetypes, Personal Attributes & Technical Skills*.<sup>13</sup> If you want your appointee to become more self aware, you may like to point them in the direction of: *Broker Self-Assessment Tools*.<sup>14</sup>

## The application process

In addition to providing a CV and a statement of interest and suitability for the brokering role, it is a good idea to solicit more detail about the applicant's partnering experience and / or partnership-brokering track record. Questions to ask in advance could include:

- *What different types of multi-stakeholder partnerships have you been involved with?*
- *What partnership brokering roles have you undertaken to date?*
- *What do you see as your key partnership-brokering strengths?*
- *What have you found to be typical partnering / partnership-brokering challenges in your work to date?*
- *Are you a qualified partnership broker (ie formally Accredited by the Partnership Brokers Association) or do you have a relevant / equivalent qualification (eg in mediation, negotiation or facilitation)?*

In terms of references – it is valuable to try and secure endorsement of an applicant's suitability by having a conversation with someone who is familiar with their partnership-brokering work and track record.

## Conducting an appointment interview

It is important to consider who should be involved in pre-meetings or in the interview itself.<sup>15</sup> For an internal partnership broker, it may be that the decision is made within the specific partner organisation (often the organisation that is initiating the partnership) but even in this instance it is good practice to involve one or more other partners in the selection process. For an external partnership broker, it should be quite straightforward to involve two or more partners in the interviewing and selection process.

When conducting interviews to appoint a partnership broker, it is worth probing to try and find out whether or not the potential appointee demonstrates a number of important attributes. For example, asking the kinds of questions that might reveal whether they seem able to:

- Get inside different partner perspectives
- Demonstrate clarity of purpose and focus
- Provide practical, productive and tactful interventions
- Be meticulous in record keeping and communicating
- Support rather than dominate in the way they behave towards partners and stakeholders
- Accept that they would be serving / managing a partnering process
- Be ready and willing to 'let go' of the role and hand over to the partners when the time is right and, most importantly,
- Provide the right 'fit' in terms of the specific context, culture(s), needs and challenges

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<sup>13</sup> Available on [partnershipbrokers.org](http://partnershipbrokers.org)

<sup>14</sup> Ibid

<sup>15</sup> It may be a good idea (especially in the case of an external broker) to arrange for the short-listed candidates to meet partners and / or visit the proposed area of work or any existing project as part of the interview process. It is important that partners are confident about the choice and that the broker actually **demonstrates** some of the range of skills they will need in the role.

## Drawing up a contract

The nature of the contract may vary due to a number of factors.<sup>16</sup> For an internal partnership broker, for example, where the role may be more informal, the kind of document needed may be more along the lines of a **scope of work** attached to an existing employment contract (agreed in advance with the partners). For an external partnership broker, being brought into the partnership as a paid expert, a **formal contract** will be necessary.

▫ **Elements to include in a Broker's contract:**

1. Outline of the actual / proposed partnership
2. The anticipated type of role the broker will be expected to play
3. The timeframe for the duration of their role
4. Milestones in relation to the partnering cycle
5. Scope of work / outline of key responsibilities
6. Line management, appraisal and review procedures
7. Hand over strategy

In addition, contracts should clarify all terms and conditions of appointment (including salary / fees and holiday entitlements) as well as details of grievance procedures and, where relevant, legal and insurance issues. In addition, contracts should summarise line management and accountability arrangements.

## Supervision and accountability

From an early stage, partners need to agree how and to whom the partnership broker will be accountable. There are two types of accountability. These are:

- Day-to-day line management – most efficiently conducted on behalf of the partnership by a nominated individual
- Ultimate accountability – this invariably involves all the partners using some pre-agreed reporting and appraisal system.

Partners need to understand and distinguish between these and to create (and adhere to) appropriate reporting arrangements for brokers. The broker will also need early clarification on:

- Communications mechanisms that will ensure partners provide them with regular inputs, feedback, support and (where appropriate) critique
- Responsibilities, authority and accountability requirements for partners (to each other as well as to their individual partner organisations)
- Circumstances in which the partnership can be terminated (and the implications for the brokering role)
- Circumstances in which, and procedures whereby, the role of broker can be challenged, changed or terminated
- Grievance procedures that they can resort to should it be necessary

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<sup>16</sup> Given the particular nature of the broker's role – specifically that it will need to be quite fluid and is also likely to be temporary (handing over to partners or project managers in due course) – short to medium-term contracts are probably more suitable than open-ended or long-term contracts.

All those involved need to take the broker's role seriously and give due respect and attention to the broker's needs. This includes being open and honest about issues of concern as well as taking the broker's review and assessment process seriously.

At all times, partners and line manager should offer their views in a professional and helpful manner – the partnership should ideally be strengthened, not weakened, by the way the partnership broker is managed and their performance is reviewed

## **Building capacity**

The partnership-brokering role is multi-layered and, as implied above, it takes skill and determination to do it well. Partnership brokers often report feeling isolated and stressed by the demands of the role.

*“The process of sticking to my role is often lengthy and repetitive, and in some cases it feels as if it would be less hassle to just give in and take on more responsibility. However, this is not the way it should be and it is important for me to coach and educate others and sometimes just to be prepared to say 'no'. There is a fine balance between me not stepping in too much, but also realising when I need to take action and call a meeting / phone call if progress is lagging or things are running off course. It's really very challenging and I sometimes feel quite on my own, on the outside looking in!”<sup>17</sup>*

So partnership-brokers need understanding and support to be able to function well. They may also need further training<sup>18</sup> to build critical skills that are under-developed. It may be helpful for them to be part of a learning group (with other partnership brokers from different partnerships) or to have one or more 'critical friends' or an experienced partnership broker as a mentor – people who are prepared to listen and give considered and informed responses to what they hear.

*“I am not only building confidence in my skills as a broker, but also learning to be more at ease about the inherently complex nature of partnerships. My working nature is to solve, fix and make stakeholders happy but I think the biggest confidence booster I am getting through this whole process is feeling at ease with complexity. I suppose this is where reflective practice is helpful, allowing me to comfortably and confidently listen, learn and adapt in what will always be an inherently complex, changing process”<sup>19</sup>*

## **Reviewing performance**

### **Self-assessment:**

A partnership-broker's line manager should encourage them to undertake some form of self-assessment in advance of a performance review meeting. If the individual takes a 'reflective' approach to their work, they should have a fairly good sense of how well they are fulfilling the role and it should not be difficult to complete a self-assessment prior to a formal review. The self-assessment may not necessarily be given to the line manager (although it could be a requirement, if that is agreed in advance) but will enable the broker to be better prepared for their review meeting.

### **Partners' assessment:**

It is important to access the views of the partners and partner organisations about how effectively the partnership broker is undertaking their role. This can be done on a formal basis (for example, asking each partner / partner organisation to complete a questionnaire) or an informal basis (for

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<sup>17</sup> From the log book of a partnership broker – compiled as part of the PBA accreditation process

<sup>18</sup> This may be formal training as a partnership broker (see: [partnershipbrokers.org/training](http://partnershipbrokers.org/training)) or training in specific skills

<sup>19</sup> From the log book of a partnership broker – compiled as part of the PBA accreditation process

example, having a discussion with the partners as a group at the end of a business meeting – perhaps even with the partnership broker present, though this may inhibit frank discussion).

In any case, the partners' views are very important and should be taken seriously. In fact, a well-conducted review process can be a useful way for partners to think through more fully the developing nature of the partnership broker's role and their own changing responsibilities in the partnership. The process itself may play a significant part in partners recognising their responsibilities and lessening their reliance on the broker as the partnership moves through the partnering cycle.

Since the partners are likely to be busy people, the process should be kept simple. However, it is important that partners are encouraged to use their assessment of the broker to:

- **Review** their own activities / behaviour within the partnership and how this has impacted the broker's ability to undertake their role well
- **Consider** the totality of the broker's role and whether or not their requirements as partners are realistic
- **Reflect** on how they (or others in their organisation) should / could be taking on more of the brokering activities
- **Take stock** of the partnership's achievements and how much more could be achieved with appropriate changes / developments
- **Present** their comments in a creative and constructive manner (even where there are grounds for dissatisfaction)

#### **Performance review guidelines for the line manager**

Having asked for input from partners in advance of the review meeting, the line manager will be in a good position to present a comprehensive picture to the broker on behalf of the partners. The task for the line manager is to conduct the assessment with the partnership broker by:

- **Tracking** their activities against the terms of reference in their contract
- **Measuring** their achievements in the light of pre-agreed goals and delivery timetables
- **Considering** governance and line management issues
- **Exploring** the views of partners and broker
- **Clarifying** any areas for improvement
- **Discussing** forward planning (including consideration of broker's changing role; transfer of responsibilities; planned strategy for handing over responsibilities and / or exiting from the role)

The line manager should also plan carefully how they will pull together different perspectives on the partnership broker's performance and consider how best to conduct the review session in a way that is open, honest and productive – all the time working to enhance the effectiveness of both the partnership broker and the partnership.

#### **Conducting a performance review meeting**

Given the complex nature of a partnership broker's role (including their double accountability both to a single organisational line management structure as well as to the partners as a group), it may be appropriate for the assessment interview to be conducted by both the line manager and one other person nominated by the partners to represent their perspective.

Structuring the review meeting is important – with those interviewing being well prepared. In addition to a comprehensive review of how the partnership broker has fulfilled their role, it is important to offer an opportunity for the broker to feedback their experiences – particularly to

identify any management or contextual issues that may have had unexpected impacts on their ability to achieve pre-agreed goals.

Those conducting the interview may also need to be reminded that the partnership broker will be understanding their role as temporary and therefore that success will also need to be measured as much by how far they have handed over as on how complex and comprehensive their portfolio of activities is.

### **Decision-making, feedback and moving forwards**

Once the review has been completed, any conclusions and proposals for future work should be given in writing to the partnership broker and communicated appropriately to partners. The written report should include revised and clear targets for the agreed next period. Where it is necessary or desirable for changes to be made in terms of management / behaviour / focus of either the partnership broker or partners, these should also be itemised and discussed with those involved – wherever possible with practical suggestions and a timetable for changes to be implemented.

It may be useful to see the review procedure as a way of taking stock in order that all those involved can better understand the changing requirements of the partnership as it develops over time. Part of the assessment process should be to enable the broker and the partners to move forwards rather than getting stuck in habitual and over-dependent working relationships. Of course, there may be some circumstances where the partnership broker's work is deemed to have been wholly unsatisfactory. If it is agreed that there is no room for improvement, the role should be terminated according to the terms and conditions outlined in the contract.<sup>20</sup>

Where the role has been undertaken on an informal basis (for example, an internal broker having simply adopted the role to fill a short-term gap), it may be more a case of a frank discussion with the partners as a group about how the role can be more widely shared in the future or handed over to another person, whether internal or external to the partnership.

In any event, it is important to remember that partnership brokering is a relatively new professional area and as such there are few norms or benchmarks in place against which to measure competence. Partnership brokers are there to support partners and to serve the needs of the partnership rather than to build a permanent position for themselves, so in assessing how well they are fulfilling the role, managers and partners may be looking for subtle rather than obvious qualities. Good partnership brokering should, ultimately, be measured by how effectively the partnership develops and by how systematically the role of broker becomes unnecessary.

### **Further things to consider**

Operating as a partnership broker often find themselves 'brokering' a number of different things – for example:

- **Helping to initiate and / or shape the partnership** by drawing together ideas, innovation and imaginative responses to intractable issues
- **Building and intermediating a wide range of relationships** across the traditional divides of culture, sector, values, status and / or geographies
- **Supporting complex decision-making processes** with a range of stakeholders at both strategic / decision-making or grass roots levels –

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<sup>20</sup> It is very important the decision-maker checks that the partnership broker is not being made a 'scapegoat' for the failures of the partners or the partnership – for the health and wellbeing of the partnership broker as a professional as well as for the partnership itself.

- **Actively seeking opportunities for building partnering capacity** in individuals, organisations and partnerships
- **Assisting in the evolution of new, fit for purpose, collaborative mechanisms** and institutional models
- **Engaging partners, donors and others in new approaches to reviewing** partnering effectiveness and added value

Partnership brokers often find themselves not just managing diversity but actually juggling a number of contradictions within the partnership – for example:

Supporting / serving	Shaping / directing
Disrupting	Consolidating
Working from intuitive insights	Working from logical deduction
Unaligned / neutral	Passionate / persistent
Building a level playing field	Promoting new leadership

It can be a tough role, and those who do it well often carry a great deal of almost invisible responsibility – in fact it is likely that the best of partnership brokers carry their role with an impressive degree of modesty and avoid ‘fanfares’. Part of the task of those appointing a partnership broker is to recognise this and to understand, and where necessary, give voice to their understanding of exactly how important / valuable / necessary partnership brokering can be in ensuring multi-stakeholder partnerships (and other forms of collaborative models) truly optimise their potential.