



Being a Partnership Broker: Tools for self-assessment and reflection

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BEING A PARTNERSHIP BROKER: Tools for Self-assessment & Reflection

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This tool is designed to enable those in the partnership-brokering role (or aspiring to be partnership brokers) to understand what it may take to be well equipped for the role and what attributes and skills they bring to the task.

It is not exhaustive, and we welcome feedback as we refresh it on a regular basis and as our knowledge deepens from the experiences our Partnership Broker's Training alumni share with us from their many different contexts.

In addition to understanding and building your skills, it is also very important to keep up to date with the latest developments in partnering and in partnership brokering. We recommend that you sign up to *Betwixt & Between: The Journal of Partnership Brokering* and check into the **Learning** section of the Association's website: partnershipbrokers.org/learning where you will find case studies, reports and think pieces that examine and explore the partnership brokers' role.



PARTNERSHIP BROKERING CORE SKILLS & COMPETENCIES

These are the core skills and competencies that we have found (working with partnership brokers for 12+ years) are those that seem most important:

SKILLS & COMPETENCIES	NOTES
Confidence to hold space	To help partners work through complexities, intractable issues and ambiguities that have no immediate or defined answers.
Empathy	To practice 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 partnership 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 partnership 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 elping the partners to revise the partnership based on experience.

SELF ASSESSMENT OF MY ROLE(S), SKILLS & ATTRIBUTES

Which of these terms most closely reflect your current role? ¹

(Circle as many as you feel are appropriate)

Administrator • Advocate • Ambassador • Animator • Bridge-builder • Coach
 Communicator • Consolidator • Co-ordinator • Disrupter • Educator • Evaluator
 Facilitator • Guardian • Innovator • Interpreter • Manager • Mediator • Negotiator
 Organiser • Pioneer • Record-keeper • Researcher • Resource-mobiliser • Monitor
 Others – please specify:

My partnership brokering skills self assessment:

Skills (1= low 5=high)	Importance in your current role	Current level of competence
NEGOTIATION	1 2 3 4 5	1 2 3 4 5
MEDIATION	1 2 3 4 5	1 2 3 4 5
FACILITATION	1 2 3 4 5	1 2 3 4 5
SYNTHESISING INFORMATION	1 2 3 4 5	1 2 3 4 5
COACHING / CAPACITY-BUILDING	1 2 3 4 5	1 2 3 4 5
INSTITUTIONAL / PARTNER ENGAGEMENT	1 2 3 4 5	1 2 3 4 5
INSTITUTION / PARTNER STRENGTHENING	1 2 3 4 5	1 2 3 4 5
EVALUATING / REVIEWING / MONITORING	1 2 3 4 5	1 2 3 4 5
OTHER (Specify)	1 2 3 4 5	1 2 3 4 5
OTHER (Specify)	1 2 3 4 5	1 2 3 4 5

¹ For further information on partnership brokering roles and tasks please see presentation entitled:

What are my partnership brokering attributes:

Mark each continuum with an 'X' where you think you fit

ABILITY TO BE OBJECTIVE

Low.....High

SENSE OF WARMTH / EMPATHY

Low.....High

PEOPLE / RELATIONSHIP MANAGEMENT SKILLS

Low.....High

ABILITY TO SEE SOMEONE ELSE'S PERSPECTIVE

Low.....High

CONFIDENCE IN MANAGING CHALLENGING PEOPLE

Low.....High

CAPACITY TO THINK STRATEGICALLY

Low.....High

LEVEL OF SELF-AWARENESS

Low.....High

Reflections on my responses to these last two assessment tools:

What kind of partnership broker am I?

We have identified 12 partnership-brokering archetypes. A partnership broker will typically fit in with more than one of these archetypes. You may show preference or aptitude for a particular archetype but equally you may find yourself needing to act out of a range of archetypes as your brokering experiences and roles change over time.

Archetype:

Seer
Sage
Fighter
Peace-maker
Magician
Healer
Explorer
Builder
Inventor
Judge
Teacher
Guardian

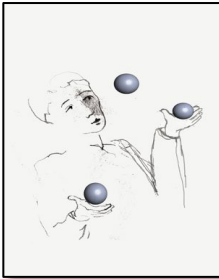
Attributes:

Gift of foresight
Gift of insight
Brave & resilient
Courageous and humble
Transformational
Curative
Adventurous
Practical
Innovative
Arbitrator
Informs and corrects
Nurtures & guides

Expressed as:

Visioning
Understanding
Campaigning
Mediating
Imagining
Problem solving
Navigating
Organising
Pioneering
Balancing
Educating
Mentoring

Where do I fit on the 'juggling' spectrum?



Partnership brokers are often expected to manage apparently contradictory things (see table below). This can be seen as a 'dance' or as a 'juggling act'... it may be helpful to know where you are most comfortable and how much 'ambiguity' or 'risk' you feel you can carry in your partnership-brokering role and / or your particular context or position.

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

3. What support / input do I need from others?

What further in-puts might you need? In terms of:

- Access to knowledge:
- Learning:
- Advice and Guidance (see below):
- Constructive Critique (see below):

Reality checking

It may be helpful to get a reality check on your performance / qualities as a partnership broker from someone else – you have a range of options including:

Critical friend	Preferably completely external and neutral – just ‘on your side’
Partner Representative	Able to give useful feedback from the partners’ perspective (very important and often forgotten)
Line Manager	Part of building an open and honest working relationship ²
Mentor	Someone specifically appointed to guide you in your work
Peer	Someone (eg from the PB Network) who has ‘been there’

Training

The Partnership Brokers Association specialises in vocational training for those operating in partnership brokering roles. The course is a four-day intensive skills-based programme and there are open cohorts available in many different locations (see: partnershipbrokers.org/training). This can lead to further / more advanced training and / or to formal Accreditation as a partnership broker. If you want to know more you can email: training@partnershipbrokers.org

Many also pursue specialist training in related skills (for example in: facilitation, negotiation, presentation, managing groups) or to develop their inner capacities to enable them to reflect, be more alert and observant or to build inner strength to handle the, sometimes stressful, partnership-brokering role (for example taking courses in: mindfulness, yoga or drawing). For these, it is best to consult the inter-net for on-line opportunities or courses near you - preferably getting recommendations where possible.

² See: *Appointing a Partnership Broker*

4. Building a strategy for reflective practice

Questions for a 'reflective practitioner' to ask themselves regularly include:

- *What did / did not happen?*
- *Why? / Why not?*
- *What can I learn from this?*
- *What role did I play?*
- *What can I learn from what I have done?*
- *What can I do with what I have learnt?*

To be a reflective practitioner you need to:

- Cultivate **self-observation** skills
- Develop **structured ways** of asking yourself questions (e.g. keeping a journal) and
- Give yourself **time** to take sit still, take stock, review the situation and your own performance

It may be helpful to make a plan of how you will reflect systematically in your busy schedule!

How will I build more opportunities for reflection into my day-to-day partnership brokering work?

What are the conditions I need to reflect regularly?

How can I encourage my partners to become more reflective in their own partnering approaches?

How best can I use reflective practice to inform my changing role as a broker?