

# PARTNERSHIP BROKERS SELF-ASSESSMENT TOOLS

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## Understanding your brokering competence

This section is designed to help build understanding of the key skills typically required by a partnership broker. It invites you to consider each of these and to undertake a simple self-assessment of a) the level of competence in that skill area and b) to what extent that skill is required in the current context in which you are operating as a broker.

### Key brokering skills

BROKERING SKILLS	NOTES
Negotiation	Brokers will need to help partners to differentiate between 'hardball' negotiation (where everyone's objective is to have their own way no matter what the cost) and negotiation based on meeting each other's underlying interests (aiming at win-win-win scenarios for all players)
Facilitation	Successful convening and relationship-building – particularly in the early stages of a partnership – requires brokers to manage a range of encounters between key players, whether in the form of one-to-one meetings, small group activities or larger task-oriented workshops
Synthesising information & record keeping	Brokers will need to be highly capable of managing complex data and layers of information and experience. They will need to ensure that meticulous records are kept of meetings and decisions – either by themselves or in overseeing someone else in undertaking this important function.
Communication & presentation	Brokers will need excellent communication skills especially in: social interaction; active listening; empathy; concise speaking; ability to tailor written communications to different audiences and conducting meaningful conversations. A broker may well need to present the idea of partnering or details about the partnership itself to different audiences. This requires good story-telling and presentation skills (whether formal or informal in style).
Coaching & capacity building	As a partnership progresses, the broker will have a new focus – transferring 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	Brokers may have a crucial role in increasing 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.

## Key brokering skills - self-assessment<sup>1</sup>

Score as: 1= low 5=high

	Assessment of my current level of competence									
Negotiation	1	2	3	4	5	1	2	3	4	5
Facilitation	1	2	3	4	5	1	2	3	4	5
Synthesising information & record keeping	1	2	3	4	5	1	2	3	4	5
Communication and presentation	1	2	3	4	5	1	2	3	4	5
Coaching / capacity building	1	2	3	4	5	1	2	3	4	5
Institution building	1	2	3	4	5	1	2	3	4	5
Reviewing & Revising	1	2	3	4	5	1	2	3	4	5
Other (specify)	1	2	3	4	5	1	2	3	4	5

## Key brokering skills - reality checking

It may be helpful to get a reality check from someone else – you have a range of options including:

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

<sup>1</sup> Please be as honest as possible – this is for your benefit! Neither over-rating or false modesty are helpful – it is far more useful to be realistic about your strengths and your weaknesses.

## **Current brokering challenges**

**Internal to your organisation**

**Within the partnership**

**External (from the context that have impacts on you / the partnership)**

## Plans for professional development

Priorities	Opportunities

## What kind of partnership broker are you?

We have identified 12 brokering archetypes. A broker will typically fit in with one or more 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:	Universal Attributes:	Expressed in brokering as:
Seer	Gift of foresight	Visioning
Sage	Gift of insight	Understanding
Fighter	Brave & resilient	Campaigning
Peace-maker	Courageous and humble	Mediating
Magician	Transformational	Imagining
Healer	Curative	Problem solving
Explorer	Adventurous	Navigating
Builder	Practical	Organising
Inventor	Innovative	Pioneering
Judge	Arbitrator	Balancing
Teacher	Informs and corrects	Educating
Guardian	Nurtures & guides	Mentoring

What archetype do you feel fits you best?

Why?

How do you relate to the others – specifically the archetype that is paired with yours?

## **Understanding and building from personal attributes**

In addition to skills, personal attributes play a major role in your capability and effectiveness as a broker. They all contribute to a 'whole person' approach to the role – being yourself, working from your own authentic voice...

Such attributes include:

- Common sense (!)
- Sense of warmth / ability to empathise
- Genuine interest in & open-mindedness about others
- Humility /modesty
- Personal courage and self-confidence
- Self-awareness
- Perceptiveness / intuition / getting beyond the obvious
- Personal integrity / sense of 'service'
- Being able to maintain a balance between 'engagement' and 'objectivity'

How do (or don't) these attributes manifest themselves in what you currently do as a broker?

Which need more attention / work?

### **What further in-puts might you need?**

... in terms of access to knowledge?

... in terms of learning?

... in terms of advice and guidance?

... in terms of constructive critique?

... other?

### **Building a strategy for reflective practice**

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?