

# PARTNERSHIP BROKER'S PROFILE

Brokering Archetypes, Personal Attributes,  
Technical Skills & Resources

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## Introduction

Partnership brokers are individuals (or organisations) that support multi-stakeholder partnerships at local, national or international levels enabling them to better achieve their goals.

Partnership brokers:

- Act as change makers. They intervene in a range of ways depending on what is most appropriate to the needs of the partnerships and / or the phase of the partnership in the partnering cycle
- Are, above all, dedicated to connecting ideas and people in order to help clarify goals and improve the operations of a partnership
- Can be expected to be good capacity-builders, communicators, facilitators, organisers, process managers, record-keepers and more
- Become redundant when they undertake their roles well – as the partners increasingly carry the work of the partnership and manage the partnering process themselves.

As well as helping partners to maximise benefits and impact, good brokering can play a significant part in ensuring that a partnership becomes an innovative and productive mechanism for change.<sup>1</sup>

This paper is designed to build confidence and capacity for those operating (whether formally or informally) as partnership brokers. Much of the material has been adapted from an earlier publication: *The Brokering Guidebook – Tools for Navigating the Partnering Process*.<sup>2</sup> This publication contains a fuller overview of the changing brokering role during the life of a partnership as well as more exploration of brokering challenges and opportunities. It includes a consideration of: 'internal' and 'external' brokers; the nature of the brokering approach depending on how reactive or proactive the broker is asked to be as well as a number of tools and guidance notes on many different aspects of brokering.

Whilst we are convinced that brokering must remain flexible and highly adaptable and that attempts to over-formalise it risk becoming over-prescriptive, we also know from experience that much time and effort can be wasted where those acting as brokers make unnecessary mistakes.

To complement this material, we have produced a comprehensive set of materials entitled: *Appointing a Partnership Broker – Guidance for those involved in making the appointment and assessing performance*. If you are acting (or planning to act) as a broker, we suggest that you access this and share it with your line manager and / or your partners so that they can fully support you in the role and help you to maximise your impact.

In addition to good line management, brokers can benefit from additional support and creative critique. There are a number of ways of finding support including:

Option	Considerations
Critical friend	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 Partnership Brokering Network) who has 'been there'

<sup>1</sup> For more on this – please see the leaflet: *What is a Partnership Broker?* This leaflet provides an introduction to the idea of brokering for partners, decision-makers, donors and other interested parties. Available from [www.partnershipbrokers.org](http://www.partnershipbrokers.org)

<sup>2</sup> Published in 2005 by The Partnering Initiative and available in hard copy (for sale) or to download (free) from: [www.thepartneringinitiative.org](http://www.thepartneringinitiative.org)

Finally, whilst our experience over 20 years convinces us that the broker is critical to effective partnering, it is important to sound a note of caution. The role of a broker must always be kept in perspective. Good brokering is not a substitute for good partnering. It is always the partners themselves that are central to, and ultimately responsible for, making their partnership work.

We hope you find this material helpful and will always be pleased to hear your comments and to consider adapting the materials in the light of your experiences.

Ros Tennyson

on behalf of The Partnership Brokers Association

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## The Brokering Role and the Partnering Cycle

Any brokering role will change for a number of reasons – not least, the changing nature and priorities of the partnership as it evolves over time.<sup>3</sup>

### Potential Roles for Brokers in the Partnering Cycle

#### SUSTAINING OUTCOMES

Brokering roles can include supporting partners in their:

- Discussions on 'moving on' choices
- Recognition and celebration of the partnership's achievements
- Reaching agreement on type of information for the public domain
- Identification of further champions and spheres of influence
- Work to ensure that outcomes are sustained
- Closure / moving on management

#### REVIEWING & REVISING

Brokering roles can include helping partners to:

- Agree evaluation procedures
- Assess the impact of the partnership
- Draw out and apply lessons
- Review efficiency of the partnership
- Review the added value to partners
- Brainstorm new ideas /developments
- Make any necessary changes to project or partnering arrangements

#### SCOPING & BUILDING

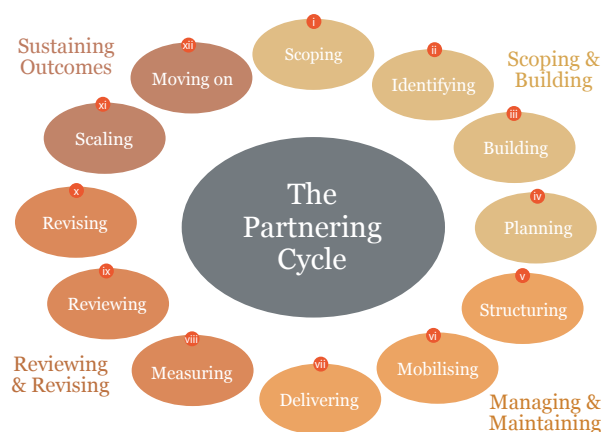
Brokering roles can include:

- Initiating the idea of partnering
- Making the case to potential partners / donors / decision-makers
- Energising and enthusing
- Scoping the possibilities
- Early relationship building
- Managing expectations
- Initial / outline planning
- Helping partners to reach agreement

#### MANAGING & MAINTAINING

Brokering roles can include working with partners to:

- Secure resource commitments
- Build governance arrangements
- Deepen organisational engagement
- Develop a communications plan
- Build partnering capacity
- Problem solve constructively
- Agree benchmarks for later evaluation



## Brokering Archetypes

We have identified 12 brokering archetypes. Any broker will typically fit with one of these archetypes. You may show preference or aptitude for a particular archetype but equally you may find yourself needing to act out 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

<sup>3</sup> Central diagram 'The Partnering Cycle' is copyright The Partnering Initiative.

## 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'

## Technical 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.

## **Principles of Good Brokering Practice**

Professional partnership brokers adhere to a number of good practice principles:<sup>4</sup>

1. Keep in touch with new developments in theory and practices of brokering partnerships
2. Apply the most appropriate tools at each stage of the partnering process and innovate where necessary
3. Take every opportunity to build partnering capacity in others
4. Refrain from promoting a partnering process when aware of a realistic alternative that would deliver better outcomes
5. Avoid taking actions as part of a brokering process that might involve risk without prior endorsement of these actions from all the parties likely to be impacted
6. Demonstrate a responsible attitude by raising concerns of an ethical or legal nature with partners when necessary
7. Know one's own competence limitations and the circumstances in which it is
8. appropriate to request assistance from, or hand over brokering responsibility to, others.

All partnership brokers are strongly advised to review their practice against these principles on a regular basis in order to assess where their approach may be deviating from them and to consider how they may best be upheld – especially when working in challenging contexts. This will not only provide support and structure to an individual's brokering activities but will also help to contribute to brokering standards worldwide and to partnership brokering as a paradigm.

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<sup>4</sup> To be awarded accreditation after successfully completing Level 2 of the Partnership Brokers Training, it is necessary to sign a copy of these principles as a pledge towards maintaining integrity and professionalism in brokering practice.