What do Partnership Brokers Do?

An enquiry into practice

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Section 1: Why this Enquiry?

"The gap between the need to think and act interdependently and our ability to do so sits at the heart of the most difficult problems we face today. A sustainable world will only be possible by thinking differently – by learning to see the larger systems… and by fostering collaboration across every imaginable boundary."

The Necessary Revolution, Peter Senge

Partnership brokers - why do they matter?

Peter Senge suggests that the future of our world rests heavily on our ability to foster collaboration 'across every imaginable boundary'. Indeed it is hard to imagine the current fragmented approach being able to meet the enormous challenges we face – so collaboration may well be our only option.

The work to develop the profession of 'partnership broker' started in 2003[1] as it became increasingly clear that multi-stakeholder collaboration (aka 'partnerships'), whilst being energetically promoted as central to sustainable development, were struggling to achieve their ambitious goals. Indeed, many were struggling simply to become partnerships – in any meaningful sense of the word.

Observation of, and research into, a wide range of partnerships over many years suggested that where there was one (or more than one) person acting in the intermediary role, partnerships tended to have deeper engagement, greater focus and more impact. It became increasingly clear that the inter-mediating role was critical – and so the idea (and the terminology) of partnership 'brokering' was born.

The working hypothesis since 2003 has been that partnership brokers (whether called by this term or not) are critical to effective partnering. In order to test this idea, whilst also helping those operating as partnership brokers, the partnership brokering project was established[2] to provide professional training, support and recognition.

Partnership brokers – in our experience of training more than 650 of them – can come from anywhere, both in terms of geography and in terms of societal sector (Business, Government, International Agencies, Civil Society, Donors and Academic institutions have all put key staff through the Level 1 training course).

Partnership brokers operate in a range of styles (whether as 'shapers', 'facilitators', 'co-ordinators' or 'process managers'). Some operate as 'internal' to a partnership (ie working from within one of the partner organisations) and others as 'external' to a partnership (ie as independent professionals working on behalf of all partners).

And whilst certain partnership brokers choose the role, others have it imposed on them by their line manager or their partners. To mis-quote Shakespeare: *Some are born brokers, some become brokers and some have brokering thrust upon them.* [3]

Whilst an increasing number are actually called 'partnership broker', many simply operate as de facto partnership brokers without this title.

> *"I see my role as a 'non approved and de facto' broker as being to ensure that the partnership is on track in terms of vision and mission and within a framework agreed by all the partners."*
>
> Partnership Broker working with indigenous communities in Australia.

Despite the diversity suggested above, partnership brokers do have certain things in common. In fact, they tend to be certain kinds of people – those who are at their best working for the good of the whole rather than for their own interests and who see themselves as someone who empowers and supports rather than someone who controls and directs.

How do we know what we know?

Of course we cannot simply assume that our hypothesis about the importance of partnership brokers in effective multi-stakeholder collaboration is correct. And yet it is only now that we believe we have 'critical mass' in terms of a significant number of people operating in the partnership brokering role to enable us to enquire more systematically into what partnership brokers are doing, how they are doing it and whether it truly makes a difference.

Some recent work has involved the formal evaluation of a partnership broker working for an NGO in Jamaica.[4] This allowed us to explore some key areas that seem to be fundamental to appraising a partnership broker's role (see Box 1 below).[5]

1 Began as a collaborative project between the UK's Overseas Development Institute (ODI) and the International Business Leaders Forum (IBLF) and led by Michael Warner working at that time with the ODI and Ros Tennyson working with the IBLF. See www.partnershipbrokers.org for more details.

2 Now the Partnership Brokers Association - registered in England and Wales as a not-for-profit company.

3 Adapted from Twelfth Night: "Some are born great, some achieve greatness, some have greatness thrust upon them."

4 We are grateful to Oxfam Jamaica for their permission to cite the material in Boxes 1 and 2 for this report.

5 'Element of Evaluation' terminology was developed by Ros Tennyson for The Partnering Initiative.

Box 1: Appraising a Partnership Broker			
Element of Evaluation	**Purpose**	**Methodology**	**Primary source of data**
Tracking activity and output of the broker & partnerships in the brokering approach	• Develop an understanding of the partnership landscape: design, dynamics, life cycle stage, management, outputs. • Collect, collate & interpret recorded data of broker's commitments, activities & outputs	Desk research	Documents provided by broker & partners
Assessing impacts of activities / projects	• Identify outcomes & measure these against partnership programme goals with a focus on the broker's role in achieving these outcomes	Desk research 1:1 interviews	Documents from broker & partners; Key informant interviews - partners; stakeholders & beneficiaries
Reviewing the broker's role in terms of efficiency and effectiveness	• Examine the relative efficiency of the decision-making and implementation processes • Examine the relative effectiveness of the partnership in achieving goals	Field visits 1:1 partner interviews	Key informants from partner organisations
Reflecting on the broker's added value to the partner-ship	Consider the perspective of the broker's role and contribution from the perspective of: - each partner - the partnership as a whole	Field visits Selected 1:1 partner inter-views	Key informants from each partner organisation
Evaluating the broker's role in relation to the partnership paradigm	Explore the appropriateness, cost effectiveness & potential for outcome sustainability where there is a partnership broker involved	Desk research; 1:1 interviews; Peer discussion & review; Compare to other (non-brokered) partnership case studies	Interview notes; NGO documents; Other partnership examples & case studies

This evaluation also sought to assess a partnership broker's added value through a more 'narrative' approach (see Box 2 below)

Box 2: Developing an approach to assessing a Partnership Broker's Added Value

In terms of how we define 'effectiveness' and 'value-add / benefits' of a partnership broker, the focus is on the following characteristics:

- The partnership broker is doing what he/she set out to do
- The partnerships involved have had some specific 'added value' from the partnership broker's involvement
- The presence of the partnership broker is leading to wider impact for the partnership
- The partnership broker has helped to ensure innovative, sustainable and self-managing solutions.

From this study, we have begun to develop a systematic approach to assessing and evaluating the role and added-value of a partnership broker. This is work in progress and we welcome opportunities to test out our approach and to compare / align it with others.[6]

The prompt for this report, however, came from elsewhere. After 8 years of running PBAS (the formal Partnership Brokers Accreditation Scheme), we have 250+ graduates who have each completed a comprehensive 'logbook'[7] of their partnership brokering experiences over a 3-4 months. We began to realise that we had a unique body of work to hand – really quite remarkable data from individuals on the partnership brokering front line operating in a wide range of contexts and circumstances.

Their logbooks record partnership brokering from a number of perspectives including:

- Reviewing actual experience against partnership brokering theory
- Ascertaining the usefulness of partnership brokering tools and techniques
- Exploring the gap between expectations (of partners)

6 See www.partnershipbrokers.org/learning.

7 For a definition of the PBAS Logbook and its role in developing more 'reflective' practice see p9.

and realities (of the broker's role and / or competencies)
- Revealing how partnership broker's actually spend the bulk of their time
- Uncovering the challenges of being in the partnership brokering role.

This material is invaluable to those of us keen to understand the true nature and value of partnership brokering in relation to the partnership paradigm: it is complex, comprehensive, reflective and analytical. It is particularly valuable because the logbooks are so revealing in the sense that they were written for purposes of learning and professional development rather than for the public domain. The tendency is therefore towards honest exploration rather than positivism and personal positioning.

> *'Where I fall down is in expecting the reality to look like the theory: a nice linear progression, step one to step two to step three. In practice I had to step into a partnership that was already started, not calling itself a partnership, and not representing all sectors. Be in step 4 and step 1 at the same time and figure out how to make it work. Fun stuff!"*
>
> Extract from a partnership broker's logbook

This may be good action research, but is it 'objective'? What problems should we be aware of in drawing conclusions from un-triangulated data that comes from a group of informants who are (almost by definition) passionate and committed to partnership brokering as a professional discipline of assumed value?

Of course, there is inevitable bias in what has been recorded but it is quite hard to know whether the bias is towards the positive because there is an assumption about brokering being important or towards the negative because the PBAS requirements are such that candidates are highly self-critical about their work and impact!

We did not undertake this enquiry expecting it to be definitive – rather, we saw it as a first step into asking questions and testing the claims made for brokering as a critical success factor in effective partnering for sustainable development.

The intention is to help 'position' brokers appropriately in the partnership paradigm – which means understanding better and more precisely where they add significant value and also where they may actually impede partnership development (perhaps by offering a new kind of formulaic approach and / or in breeding dependency).

The main purpose of this enquiry, therefore, is to start the ball rolling and to assist partnership brokers in figuring out: what they can aim to achieve and what is beyond their remit as well as how they can be most effective and what makes them ineffective.

A secondary audience for these findings is those (partners, donors or others) who appoint or work with brokers to enable them to both understand and to maximise their inputs and value.

The added value of reflective practice

"To look is one thing.
To see what you look at is another.
To understand what you see is a third.
To learn from what you understand is still something else.
But to act on what you learn is all that really matters."

Extract from the opening of a Partnership Brokers log book

Those practitioners who choose to go on to become formally accredited partnership brokers undertake a 3.5 month programme of mentored professional practice. They are assigned a mentor who works with them (long-distance) to challenge their thinking and help build their skills, strategies and confidence.

PBAS mentors are all accredited partnership brokers[1] who have qualified at 'distinction' level. They are, therefore, familiar with the material from the Level 1 Partnership Brokers Training as well as being highly experienced partnership brokers themselves.

It is clear that the role of the mentor in the PBAS process is an important one – particularly in the way it helps to shape a partnership broker's sense of themselves as a professional and to encourage (hopefully) a lifelong appreciation of the value of being a 'reflective practitioner'. As part of this enquiry, we asked the group of mentors (many of whom had by this stage mentored as many as 12 candidates on PBAS) to give their views in response to four questions relating to their mentees. Their responses have also been incorporated into this enquiry.

It is the primary task of a mentor to push the candidate into being analytical and constructively self-critical. In support of this, it is a PBAS requirement that candidates keep a logbook [2] of their experiences that is reviewed regularly by their mentor and eventually submitted for examination.

> *"At the start, my mentor encouraged me to reflect on which of my brokering skills were strong and which I needed to work on. Actually, in the past I have had lots of difficulty in identifying the skills I have – so this was useful in making me more conscious of the way I work. As part of my reflection – followed up in phone calls with my mentor – I began to recognise that I am a strong 'shaper' and therefore at times I hold on to my own ideas too firmly and become too directive. I was not really allowing the partners to go through the building and shaping processes."*

1 250 individuals to date. See www.partnershipbrokers.org for more details.
2 A logbook is the term used for a technical journal that records a journey.

In a few cases, despite regular urging from their mentor, some candidates neglected their reflection and their logbook entries.

> *"I often did not find the time to keep my log book up to date, so entries were often written some time after the events had taken place and the circumstances moved on. This meant that some really important details about the scoping phase were not captured. Only afterwards did I realise that these would have been invaluable in helping me to understanding better what to do when things got stuck.*
>
> *Later on, when I started to write my logbook regularly, it quickly became clear that it was just what I needed to reflect on the larger picture of the partnership, and my changing role within it."*

Having to sit and reflect in order to capture thinking and experience in written form to share it concentrates the mind quite powerfully!

Creating a level of structure to the logbook (for example, by using headings) can help to prompt a more systematic approach to reflection – as with this example from a partnership broker's logbook that, interestingly, she is still using some 12 months after completing her accreditation:

Headings for each logbook entry:
- Learning from what I am doing
- Dealing with working in isolation
- Keeping my focus on the primary purpose
- Maintaining a flexible approach
- Improving my brokering practice
- Maintaining progress against goals
- Problem solving and managing issues

Of course, each individual chooses a structure and headings that suit their own approach and writing style. By way of comparison, here is another example:

Headings for each log book entry:
- Issues
- Thoughts
- Working well!
- Unexpected outcomes
- Lessons

Candidates on the PBAS programme often report enthusiastically about the value of keeping a logbook and writing a final paper on their 'brokering journey'. Their explanations of the usefulness of regular reflection fall into three broad categories:

Category 1: BUILDING PROFESSIONAL COMPETENCE

Undertaking a specialist training and qualification in partnership brokering is one way of building a sense of being a 'professional' partnership broker. A lot of partnership brokering may seem like 'common sense' – and, of course, it is. But even those who already have an impressive partnership brokering track record seem to warmly welcome the opportunity to build their brokering competence and confidence systematically and holistically.

"Setting objectives for each week was a beneficial work discipline that enabled me to focus on the partnership as a whole and use my time more effectively. It also helped me to take a broader view of the partnership rather than getting caught up in the detail of day-to-day partnership management activities."

"Regular reflection teaches me about myself, both as a person and in terms of my professional capabilities as a broker."

"Reflection helps me to separate out an objective brokering perspective from my personal opinions."

"It feels important to remove as many assumptions as possible (particularly my own) when operating as a broker. I have a set of questions that I now use regularly to guide myself in my brokering work:
- *Have I done adequate research to be informed?*
- *Do I know the real resource capacity of the partners and key stakeholders?*
- *Will anticipated aspirations outstrip capacity?*
- *How will we all deal with the inevitable time constraints?"*

"Thinking about and then writing my logbook meant I captured my thought processes as a broker, some of the challenges I encountered and how I tried to tackle these. The learning from this reflection has really assisted my professional development by enabling me to acknowledge areas of weakness and to work on those areas to improve my brokering skills."

"I realised that I rarely got, or more accurately took, the time to reflect on my work. The lack of time for reflection is a by-product of working in an organisation that is based on billable hours, but it was also a function of my lack of commitment to reflective practice. The weekly logbook entries instilled in me over time a discipline of reflection that allowed me to step back from the billable hours treadmill and see my practice in a larger, more meaningful, and – ultimately – more strategic light. This has become transformative for my professional practice."

"Reflection really helps to direct my entire brokering practice – through the regular analysis of what I need to do next in my brokering role."

"Reflection helps me to understand and bring out those issues from the partnership that need further work"

"When I started the PBAS programme, my focus was on applying the skills and tools of brokering – scoping, selling, mapping, convening, negotiating, facilitating, reviewing, training, resourcing, institutionalizing and more. Then with the deeper reflection (much encouraged by my mentor) I focused on examining how I, as a person, could lead and move partnerships. I wanted to examine and improve how I related to the people in the partnerships through listening, questioning, empathizing, speaking, negotiating, proposing, counseling, confronting, preventing, intuiting, and finally giving and receiving."

Category 2: DEEPENING INSIGHT INTO WHAT THE PARTNERSHIP NEEDS

Brokers operate as intermediaries and inter-mediators – they may have strong views (most brokers undoubtedly do) but as their understanding of the brokering role deepens, they recognise that their focus must at all times be on interpreting and channelling the views of the partners. It is not at all easy to understand other people and we all too often think we know what someone else thinks without really checking to see if we are correct. Brokers have this challenge considerably multiplied by the fact that they have to deal with a group of people rather than just one and with individuals within that group coming from a wide diversity of professional and cultural backgrounds.

It is hard, but it is nevertheless critically important that a broker really understands what individual partners need as well as what the partnership as a whole needs.

" I had not realised till now how important the following three factors are for successful partnering: (1) The willingness of partners to make the partnership work based on a common and shared vision of what this could mean for our country (2) the importance of relating the partnership to the 'core business' of each organisation and (3) the capacity to engage partners in wider issues that do not necessarily relate to the immediate needs of the partnership."

"I realise that it is far more important to listen than to speak and that I must avoid overloading partners with too much information, too many frameworks or numbers. In fact they may see it as (or it may even be) a lack of self-confidence. It is important that I remember to leave space for their conversation and interaction, especially in the earliest stages of partnership formation."

"Six months after I completed PBAS, it became clear that one of the partnership projects I was brokering had not developed in the way we expected it to. Actually, it had not developed at all. It had become completely stuck in the exploration stage. I felt I had to do something to push the partnership forward, but before I did, I went back and read my logbook entries from six months earlier. One of the things I recognised by re-visiting how things had started was that whilst the project had not made progress, the partnership certainly had. On the basis of this, I was able to present to the partners what they had achieved in terms of respect, trust and engagement, and to use this as a foundation for reviewing whether the planned project should be replaced by something more appropriate and / or more satisfying to their interests."

"REFLECT • REGROUP • REFRESH has become my partnership brokering motto!"

Category 3: GAINING A STRONGER SENSE OF 'SELF'

Only if we really know ourselves can we truly be useful to others. Brokers who operate in a subtle, demanding and often isolated role need considerable inner strength as well as a level of self-confidence to do the job well. Candidates (including those who initially resist the 'reflective practice' requirement of the PBAS programme) when they achieve accreditation, often report on how much they have relished the opportunity for some invaluable learning about themselves.

"Only later did I really engage with how I might have conducted my brokering role, and some of the conversations, differently. Becoming more 'present' and self-aware – which includes the essential brokering skills of effective listening, empathising and questioning – is a challenge. It is a journey one must take intentionally."

"Greater self-awareness enables me as a broker to pro-act rather than re-act, an important ability in a context where it is sometimes easy to scapegoat brokers if things go wrong. This has been one of the most profound learnings on my brokering journey."

"I am learning to accept the conditions for what they are – not what I think they should be – and to practice using the self as an instrument of change. This means continually reflecting on my own expectations and actions, staying centred and in the moment, maintaining a sense of humour, and not feeling overly responsible."

"Parenting and brokering are both about transcending the self… getting over our personal fears and weaknesses to help our children – in the broker's case, the partnership and its partners – become what they are meant to be. As brokers we need to become change agents without ever needing to control the direction of change."

By way of summarising the value that many PBAS graduates attach to being 'reflective practitioners', we offer a summary from one newly accredited broker. She says that regular reflection gives her:

- Greater understanding of the importance of self-awareness
- Better role clarity
- Ability to know when (and when not) frameworks and tools are helpful
- Better insight into the context
- Greater valuing of teamwork and peer support
- A clarity of focus on facilitating as a tool for transformation and
- More confidence in building on the alchemy of mixing together the contributions of very different stakeholders.

This leads us neatly on to the next section – the main body of work in this report: What do partnership brokers do? How do they do it? What gets in their way?

"My belief is that there are three forces always operating in the world: an activating force (that which is trying to happen, energy moving in a certain direction); a restraining force (that can help refine what is trying to happen by challenging it and making it more robust) and a reconciling force (that helps people to work with these two forces to create something new).

I think it is clear that a partnership broker works as a reconciling force, but what I recognized the other week is that, as a broker, I may also have to act as a restraining force and / or an activating force as well. Knowing in which of these ways to act at any particular time is an art as well as a science."

Extract from a partnership broker's logbook

Partnership brokers under the microscope

So what do partnership brokers actually do? Here are the views of an **internal** partnership broker working in Africa for a multinational extractive company who sees himself in the role of broker as:

- Bringing people with different interests together achieve a common goal
- Keeping partners, stakeholders, and 3rd parties well informed of all activity and decisions made by the group
- Thinking systematically about the destiny / future of the partnership
- Creating trust between partners (in this case by holding social events and being friendly)
- Identifying and providing for the needs of each partner
- Balancing things out / exercising control when things go wrong or get out of hand
- Being the communicator between partners when necessary
- Encouraging better communication
- Advising leaders – at both local traditional leadership and national levels.

And here, for comparison, are the views of an **external** partnership broker working with a number of strategic and operational tri-sector partnerships in Canada who sees herself in the role of broker as:

- Directing from a distance (i.e. not controlling every aspect of the partnership but leading partners in the right direction to achieve goals)
- Motivating partners when / if they lose enthusiasm
- Staying well informed in order to be able to step in to clarify issues with partners when necessary
- Acting as a 'translator' or 'interpreter' between partners
- Understanding and explaining why partners make certain choices and decisions
- Encouraging better communication
- Advising leaders – in each sector and in each partner organisation.

In the Partnership Brokers Training, trainees are encouraged to think about the changing nature of their work at different stages of a partnering cycle – consciously moving from a pro-active / energising role in the SCOPING & BUILDING phase, through a coaching / capacity-building role in the MANAGING & MAINTAINING phase towards more of an advisory / mentoring role as the partnership becomes more mature in its later phases.

Listed in the diagram below (see Box 3) are some of the activities a partnership broker might expect to undertake:

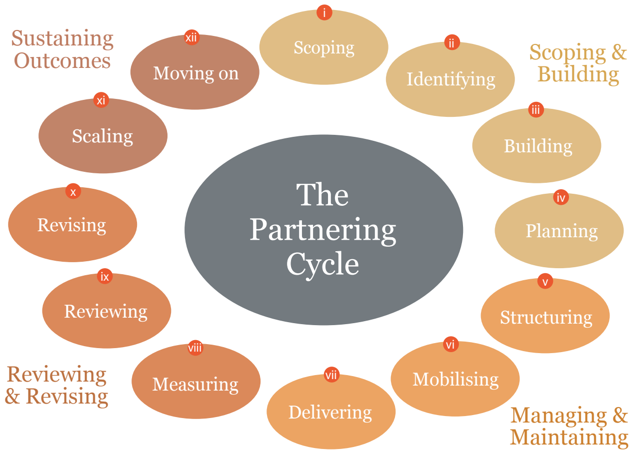
Box 3: Potential roles for Brokers in the Partnering Cycle

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

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



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

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

This is a framework[1] with which all those on the training course are familiar and, probably, has helped to shape their thinking about the changing nature of their own brokering role. As the extracts from their logbooks (cited below) reveal, however, they do not necessarily report on their activities in this neat format. Indeed, there are two themes that come across strongly in reading the logbooks:

1. Partnerships are 'messy' and rarely move logically or in a linear way (and there is even an implication that those partnerships that are somewhat 'linear' in character tend to be more 'business as usual' than innovative)
2. As brokers they can often be working in several phases in a partnering cycle at the same time (for example when they are working with a number of different partnerships, or where a partnership is well established but a new partner arrives and has to be taken through the earlier stages to be able to integrate well).

What follows are examples of the kinds of things partnership brokers typically do in their day-to-day brokering work. To make a long list more coherent, we have clustered their feedback under headings. The headings emerged from the material we reviewed – indeed, we tried hard not to impose our preconceptions onto what we read and, for this reason, it was ideal to have two interns doing the bulk of the work on this who knew very little about partnership brokering and therefore had no preconceptions!

We leave it to readers to compare what we found were the realities of the brokering role with the more theoretical 'potential roles for brokers' outlined in the framework above and / or with their own partnership brokering experiences.

However, one important point to note is that virtually all the logbooks are concerned with the earlier phases in the partnering cycle – comparatively few brokers in our orbit have at this point had to navigate the latter stages of a partnership. It is, therefore, hardly surprising that the experiences they report on in their logbooks are primarily about getting things started and with a focus on building productive relationships.

1 Central diagram 'The Partnering Cycle' is copyright The Partnering Initiative.

Partnership brokers get things started...

...by making the case for partnering

"I undertook an internal assessment within my own organisation to determine the state of 'readiness' to partner – it became clear that the strategic basis for the partnership was not fully formed so I worked hard to develop this."

"I had to work on building the case for partnering internally, and ensuring it was part of the strategic direction of my organisation."

" I became a kind of internal champion for the partnership, hoping that if I could build enough confidence in the partnership approach, others would also get engaged"

"I felt it was very important to establish allies within my own organisation who understood partnering, and who were willing to support me in my brokering role and to help make the case both internally and externally."
"I adapted my case for partnering to take account of different interests, whilst articulating a single overall goal for the partnership. "

" I tried to engage everyone with a clear vision and to articulate the benefits of partnering in different ways as relevant to each partner."

"I could not rely on suggesting only one benefit from partnering, but found I had to formulate several for each partner."

"In some cases where the organisation or the individuals I was dealing with were not used to partnering it was challenging to convince them to get engaged – especially where they were not confident of the support of their senior staff."

"I built up a large number of examples to use in different situations that helped to illustrate the value of a partnering approach. This was useful because I was operating in an environment where the idea of working across sectors was very new."

" I tried to explore and clarify what might be expected of partners and what different roles each partner might play should the partnership go ahead. This seemed to reassure them that they would not be over-committed if they said 'yes' to the partnership idea."

"I found that I adapted my language to reflect the language and terminology of the different sectors I was trying to engage in the partnership… this seemed to help my immediate contacts in each organisation frame the arguments in their own terms prior to trying to engage others in their organisation."

"I used the fact that I had completed training as a partnership broker to position myself as having expertise and skills so they would accept my 'case for partnering' more confidently."

"I decided to produce a 'scoping' note, in which I outlined why a tri-sector partnership might be of interest to our organisation and to potential partners. This consisted of:
- *Rationale for exploring partnership*
- *How I proposed to initiate exploration*
- *Possible ethical guidelines that would underpin the partnership*
- *My perception of each party's possible interests, drivers and contributions*
- *What I perceived as risks with proposed mitigation measures."*

...by exploring both partner and partnership potential

"In the scoping and building phase of the partnership, I found it very important to adopt the skills involved in interest-based negotiation that we had tried out during our training:
- *Building trust with potential partners, especially the new ones, through creating an environment favorable to mutual understanding and communication*
- *Revealing their underlying (often hidden) interests*
- *Widening the options with initial problem solving ideas*
- *Getting early 'buy in' from potential partners to at least explore further."*

"I persuaded my line manager that it was really important to get to know potential partners pretty well before making a commitment to partnering with them."

"I mapped out the different local government partners who could be involved, and eventually decided on a department which I believed would be more open to working innovatively and be less constrained by regulations. This benefitted the partnership as it meant the partnership when it was formed had strong public sector backing and engagement."

"I spent some time building profiles of each partner to be shared with the group so they would start their collaboration with some solid and accurate information about each other."

"It seems to me that a broker can play a useful role at this stage by formulating a concise statement of the problems to provide a central idea for the partners to work to and to provide a foundation for all future work."

"It was really important to manage expectations – both within my own organization and in partner organizations. A fine balance to be visionary and optimistic on the one hand as well as realistic and cautious on the other!"

...by creating a space for innovation

"I tried to bring out the meaning of a 'partnership' and managed to show potential partners the benefits where a proper cross-sector partnership are bigger than simply delivering an agreed project – where cross-sector engagement would unleash untapped potential and nurture creativity and innovation. This allowed the partners to see a wider picture as opposed to the narrow focus on 'how many, how much' that had characterised our earlier interactions."

"I am constantly trying to encourage the partners to innovate, and not to get stuck in the idea of 'that's the way we do things around here'…"

"At times I saw my most important role being to push the partners to be more creative and to explore completely new approaches."

Partnership brokers build and maintain working relationships...

...by building sound working relationships

"I always try to follow up with each of the individuals involved – not only took forward the implementation activities but also to develop more relationship bonding. What I learnt at the partnership brokering training helps me a lot in convening and managing meetings with different stakeholders."

"It was important at an early stage to work out with the partners specific roles and responsibilities within the partnership."

"We built good working arrangements by being open with our ideas and finding opportunities to communicate them effectively."

With the partners we cultivated partnership support networks including with other colleagues other parts of the partner organisations."

"The important lesson here is that developing partnerships can't be seen as a linear process at all, and everyone involved needs to understand that. A robust relationship needs to be developed that can withstand ongoing questioning about risks, objectives, outcomes, shared benefits and alignment."

"I make sure I am very well prepared in advance of every meeting. I try to balance the meetings so that all partners feel they have a voice and are being acknowledged.

Early on I worked with the partners to establish (and explain the reasons for) some 'rules of the game'…"

"I really emphasise the importance of on-going communication and I take on the role of communicator whenever necessary."

...by building understanding and trust

"Relationship with the partners is the key for building trust that in turn creates a basis for mutual understanding. Of course, I have learnt the hard way that building quality relationships requires a good length of time."

" We agreed a ground rule in the partnership… 'Clarity, Transparency & NO Hidden agendas'… this worked pretty well."

"In established partnerships there is work going on simultaneously in exploration, building and maintenance. There needs to be a regular "check" to ensure that all parties are doing things that are aligned with their prime objectives. A trusting relationship is important so that either party can feel comfortable in calling 'time out' to allow for open discussions about divergence."

"The strength of any partnership is in the quality of its relationships. Where a relationship is long standing and positive – you can start to trust that the relationship can withstand a level of scrutiny and that 'discomfort' can exist comfortably within the relationship."

"Make sure there is clarity / openness at all times so the partners know what each other want from the partnership."

"By holding social events and being friendly."

"Internally, I encountered resistance to working with the private sector as partners but I felt it was very important that my colleagues trusted me to make good decisions in this regard. I made myself available for any discussions or concerns that people wanted to raise about the partnership, in confidence or publicly. I then outlined my proposed process to show that proper due diligence was being done."

"The private sector partners were frustrated at the slow pace the NGO and public sector tended to work at, whilst they felt rushed by the private sector. To help them both feel more comfortable, I set clear agendas for meetings in advance, identifying achievements so far and what progress still needed to be made. The transparency this created helped to diffuse some of the mounting tension."

"It was hugely important to conduct open and transparent processes as well as to involve everyone at each stage of the partnership development so they could see how decisions were reached."

"Continuous sharing of information and updates helps to build confidence and trust. Also joint decision making and recapping decisions at meetings. Also used the team's complementary skills in a practical situation so that it was demonstrated to them the benefits of working in partnership.

...by managing difficult people / situations / conflicts

This is an enormously important area for brokers – evidenced by the number of references and the heart-felt write-ups in their log books! In the Level 1 training, brokers are invited to consider the idea that there is no such thing as a 'difficult' person – just people whom we / others find difficult to deal with.[2]

Behaviours brokers and partners find difficult to deal with can include: bullying, criticising, attention-seeking and playing the 'victim'. During Level 1 training, trainees are encouraged to consider what is under-lying these behaviours – what hidden interests / concerns / priorities / anxieties – and to understand how vitally important it is that they role model appropriate responses.

2 This is a view developed by Andrew Acland author of *Perfect People Skills* – a Level 1 set book.

Box 4: Example of a Partnership Broker in Action

When the broker asked him to consider how his own organisation could work with the partners to effect improvements, he moved into a defensive position and gave a kind of ' it's not my problem' response. This person's attitude began to affect the dynamic of the group and another participant began to echo this behaviour.

The broker realised that within her role she needed to take stock of the shifting dynamics within the room and to deal with the situation either by confronting the critical individuals directly on behalf of the other partners, or by making those present feel comfortable enough to address the situation themselves.

In the event, the broker asked the two partners to re-state their positions and she then highlighted the gap between them and asked them how best they thought agreement could be reached. This led to discussion incorporating the others in the room and, eventually, the two agreed on a course of action that would answer the concerns of their organisations and contribute to achieving the goals of the partnership.

"If things get too heated, I simply take control of negotiations."

"I maintain a welcoming attitude rather than a confrontational one."

"Sometimes, the egos of some high level officials impede the decision-making process and implementation of activities. To deal with such situations, relationship building with the individual works well. It is really time consuming but in due course their behaviour can be challenged and changed."

"During a meeting a new partner took up offensive and defensive positions. Offensively, he overtly criticized the other organisations represented in the room and made a number of references to serious concerns about the partnership expressed by his organisation. When the partnership broker invited him to develop his concerns further in order to assist the partnership in understanding and addressing them, he was unable to substantiate his assertion. "

"Once I realized that both partners had failed to understand the perspective of the other and were interpreting things too quickly without confirmation, I conveyed to each partner the importance of having transparent communication throughout the process and that it was insufficient to have contact

only via e-mails. We all agreed that other forms of communication, such as phone calls and face-to-face meetings, were necessary in order to avoid any confusion or misinterpretation in the future."

"To deal with the conflicting interest and approaches, I listened, interpreted, laid out plans and focused on the dialogue – all whilst keeping the lines of communication open and navigating through the bureaucrats, the politicians and the internal workings of the partner organisations. Openness and constant dialogue have been the main pillars of sustainability for this partnership."

"Instead of leaving the confrontation until the next meeting, I used 'shuttle diplomacy' to elicit views and to build more convergence of interests. When we finally met, I was pretty clear about the different perspectives in the room and I made sure that every partner spoke up for themselves and their views – rather than letting the loudest and / or most critical hold sway."

"I was finding one of the main partners fairly disruptive – he was also the one who was most negative. He often wrote inflammatory emails criticizing everyone and listing everything that he believed was wrong with the project. In order to change his attitude and his behaviour, I spent time trying to understand which of his 'underlying interests' were not being satisfied and what it was that was causing him to behave in such a way."

"It is vital for me to remain neutral when partners complain to me about one another."

...by providing reassurance and encouragement

"Partners quite often turned to me to give reassurance when the partnership seemed to be going off-track."

"I had to spend a lot of time with the corporations involved to reassure them the partnership would in time help rather than hinder their commercial interests."

"As the partnership broker, I took every opportunity to educate, inspire and reassure partners that they were actively contributing to achieving the alleviation of poverty through this collaboration by sharing ideas and opportunities to leverage their expertise."

It seemed that I needed to do a great deal of reassuring to all parties to convince them that a strategic 'philanthropic' partnership can coexist with a commercially-driven partnership and that the trick to co-existence was to ensure the two types were not dependent on each other."

"In order to reassure the partners with regard to the new status of the partnership, I organised a session with all the partners and sought out their views regarding the new formal status. I encouraged them to express their feelings about the changes and to highlight any perceived benefits or concerns as a result. They were pleased to be asked and in the end the meeting was very easy. It seemed just raising the question and seeking their engagement was enough to reassure them."

Partnership brokers make practical interventions...

...by providing methods and tools to enhance the partnership

Partnership brokers can help significantly by introducing tools of methodologies to assist in the process – especially when things look as if they are getting stuck. Many of the brokers cite examples of using tools and techniques they had been exposed to on the Partnership Brokering Training course.

Tools that brokers have adopted or adapted from the course include:

*"Before the training, I was not acquainted with the idea of **ground rules.** Earlier when I used to convene partnership meetings most of the partners responded to cell phone calls creating disruption and the flow of the session. When I introduced the idea of ground rules, everyone agreed to have ground rules – one of which was that they turn their cell phones off at all future partnership meetings."*

*"Use of **charts / posters / photographs and story telling** made the meetings far more lively and fruitful."*

*"I used the **partnership cycle** to assess which tools and roles were the most appropriate to adopt at different stages of the partnership, and also to see the overall strategy. The partners also found the partnership cycle very helpful in understanding better at what phase we were operating."*

*"Using **guidelines for partnering conversations** from The Partnering Toolbook I asked partners to identify synergies and look at reasons for collaboration. There proved to be great value in managing a brainstorming-type conversation to generate an exciting vision.*

" I saw little progress being made towards finding a solution since the partners focused on their differences

and the divisions between them. They simply repeated and defended the same arguments and assumptions and they tried to place the blame at someone else's door. I decided to try to change the tone of discussion and used the advice in the Talking the Walk Toolbook in the paper on ***richer conversations****. This advised:*

- *Bringing out the patterns and connections among things*
- *Challenging the group to learn more and search harder*
- *Expanding understanding and building shared purposes*
- *Exploring and questioning assumptions and conventional wisdom."*

"I used the ***partnership planning tool*** *to identify current and required resources within the partnership – including knowledge, financial resources, networks, and information management."*

"In an early partnership building activity, I decided to use an approach based on the principles of ***interest based negotiation*** *and planned to help uncover strategic interests at country level and build the capacity to implement."*

"My reflections during the past few months have led me to develop a keen interest in two major areas of partnership: negotiations and agreement. A key function in establishing the ***design parameters*** *of a partnership is creating an enabling environment for win-win solutions."*

"The unexpected positive benefits of partnerships can be immense – and I use the ***Partnership Review Tool*** *as a mechanism for exploring outcomes and outputs with partners."*

"She convened a partnership workshop to finalise the ***collaboration agreement*** *that would put in place a monitoring and evaluation framework and arrangements partnership management."*

"I developed an internal training for my colleagues on brokering and partnering, especially ***interest-based negotiation****."*

"To evaluate the effectiveness of the partnership I asked both parties to undertake a ***SWOT analysis*** *as a basis for a review."*

"I used the PBAS ***partnership review process*** *as a way of benchmarking so when evaluating the programme, there would be point of comparison, allowing partners to see whether the partnership approach had / hadn't led to better outcomes than the alternative approaches."*

"I decided to utilize the ***5 practical tips for facilitating*** *an effective meeting in order to ensure the partnership moved forward and stayed on track:*

- *Design the session well in advance and in detail*
- *Draw Workshop Participants actively into the discussion*
- *Keep time meticulously*
- *Use specific tools or techniques*
- *Ensure appropriate records are kept."*

"It is useful to create a common language in the partnership – so that all partners are on the same page and understand others interests, not just their own. I actually used a role-play at one partnership workshop to illustrate the benefits of working in partnership."

"It was time for the partnership to 'move on' but we didn't have any exit strategies or succession plans in place. In re-reading the course materials I found a ***Moving On Check List*** *– on the basis of this, I encouraged the partners to work through how they would:*

- *Capture and communicate the partnership's story*
- *Celebrate achievements*
- *Continue to support the activities that had resulted from the partnership*
- *Making a clean break rather than let things drag on indefinitely."*

There were also a number of examples of tools that brokers developed themselves or brought from other training or professional experience. These included:

"I decided to introduce the concept of ***Appreciative Inquiry*** *(AI) to bring a more positive outlook towards dealing with both the partnership and projects. AI concept focuses on what has been done right in the partnership, encourages people to look forward to what could be and then make plans on how to get there. There is a fundamental mind-shift from deficit-based change to strength-based innovation. There are 3 stages of AI:*
Discovery – what brings life, what do we do well?
Dream – What do we want IPPSI to look like at the end?
Design – how to achieve the dream."

"It seemed important to measure the ***means metrics*** *of the partnership and not just end metrics – as it is critical to develop metrics to measure the development of the partnership. By establishing means measurement or leading indicators, partners are more motivated and their engagement is more easily sustainable."*

*"I engaged the partners in a **game** where everyone was asked to take on the roles and responsibilities of various entities involved in the partnership. This tool allowed both parties to see the importance of understanding priorities and drivers of various organizations involved."*

*"In order to understand what each partner wanted and needed, I used an **Interest Based Enquiry Tool**. It quickly became clear what the partners' strengths and constraints were in terms of partnership."*

*"I asked partners to **draw a picture** of themselves in their professional lives as follows:*

- *Head: representing what they know in terms of qualifications, specialism, and technical know how*
- *Heart: representing what sort of person they are in their work life including their soft skills and relationship with colleagues*
- *Legs: representing their work experiences and major achievements.*

The purpose was to underline the fact that the partnership was rooted in identifying real people and the range of expertise they had to offer. It also allowed more understanding and better relationship between the partners."

*"I also used the **upside down model** to give partners an idea of how the partnership can work. This model addresses questions at an early stage like: 'what can we achieve together?'; 'How can we meet each other's needs?'…"*

...by intervening to keep the partnership on track

"To keep things on track, I hold regular meetings to remind partners of the direction of the partnership."

"When certain partners try and takeover, I am able to use my role as broker to steer back in the direction the partners have agreed."

"I try and ensure the partnership has a good 'pace' – I honestly believe progress would have been far slower if I hadn't been a kind of driver and time keeper."

"I had prepared a questionnaire for the partners to complete prior to a meeting so they came prepared and had thought through the issues and their views in advance. But I found that few had given the time to fill it in. I decided that I needed to manage the process better – make it clear why this was important, give precise directions as to how to complete it and ask for it to be sent back in advance of the meeting."

" A key partner suddenly announced that she was leaving, the other partners were very concerned – in fact, quite agitated. It fell to me to convince the group that the partnership was bigger and more important than any one individual. I also worked with the woman who was leaving to ensure a smooth and thorough hand over."

"Things were becoming really difficult and I intervened straight away and had an open dialogue with the director of the partner organisation that was presenting the main difficulties. My intention was to raise concern about the attitude of his organisation and how important it was that there was honesty in the partnership."

"I managed to intervene and swayed the conversation from challenging each other to make contribution commitments (which was going nowhere) to committing to forming a Working Group to explore the feasibility of the proposed project, work out the operational systems, and do a resource analysis."

...by identifying additional resources

A partnership broker is in an ideal position to see the bigger picture – including resource possibilities. He/she is particularly well placed to move partners away from too great a focus on securing funds and towards a greater recognition of many other valuable assets that may be available from the different partners – either directly or through their networks. There is considerable evidence from the logbooks that brokers themselves can recognise potential resources within the different partner organisations – even when partners can't.

"As the partnership progressed, I used the knowledge I was gaining from one sector to identify further resources and potential partners as well as how the work could be scaled up by accessing further resources from different sectors."

"An early meeting led to a discussion regarding goals and how to bring their resources together to solve the challenge that had been identified and agreed in other countries. It did, however, take a great deal of brokering to get the partners to be more imaginative about what resources they had and what they could uniquely contribute."

"During a joint meeting I suggested what different elements each partner might be able to contribute. My aim was allow both parties to see how much benefit can be gained and what considerable additional resources they would be able to access for the agreed project."

"I found myself suggesting other sources of funding for the project that the partners were not aware of and I was able to use my experience of proposal writing to help partners put together a joint proposal to donors."

"Since one the partners was a bi-lateral donor it was quite had work to get the partners to understand that they too would need to make a significant (if not necessarily financial) contribution. Even though I was an internal broker from the donor agency, I found myself explaining to the partners and to my colleagues internally that resourcing the partnership meant far more than money."

Partnership brokers provide 'servant leadership'...

...by focusing on the interests of the partnership as a whole

"I keep questioning myself: Are the decisions that are being made in the best interest of the partnership and not just of particular – or particularly demanding – partners?"

"I find quite often that I have to challenge the views of my own organisation in order to better facilitate the partnership in the best possible way."

"As a broker I found myself advising my own organisation that it was important to keep a low profile and to let other partners take a lead in a number of areas. This was tough for my colleagues to understand since we work for an international NGO and thus very used to being 'in charge'. But they agreed… and when it proved to work well and to build far greater equity and commitment, they used it as a model for other partnerships in other parts of the world."

"Once the programme of activities was established and working well… the partners began to consider how they could work together to scale up and also how best to use it as a model to policy makers and decision-makers in each of their sectors. This was something they had to agree and do for themselves – it was vital that it was their voices not mine that were heard at this point."

...by building partnering capacity to broker themselves

"I know it is critical that the partners do not rely on me too much – perhaps that was OK at the beginning, after all the whole partnership thing was very new for us all – but I was really concerned that the partners didn't just assume that I would do what was needed and always be there. In other words, I didn't want them to get either lazy or dependent!"

"I found myself increasingly focusing on coaching and capacity building with the immediate intention being to encourage the partners to draw on their own knowledge and experience in their field in order to come to their own solutions. Over time, I realised that the coaching role was a central part of my own exit strategy as the partnership's broker."

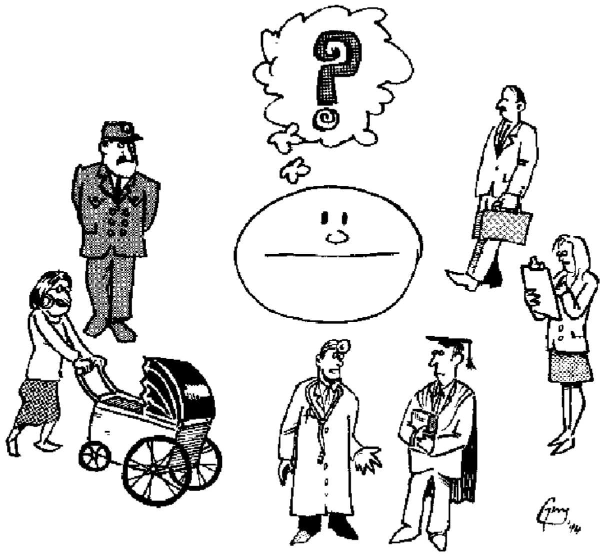
...by being ready to 'let go'

"As an internal broker, I was aware that much of my effort and skill was as a 'behind the scenes' driver of the partnership. As such it was not as visible or measurable as my other colleague's roles, and therefore I might miss out on recognition of my achievement, in what is a very competitive environment."

"I asked myself often: 'Is the partnership ready for me to step back?' and also 'Am I ready to render my role unnecessary?' Part of the problem was getting the partners to understand that my stepping out of the partnership was actually a sign of achievement and success not abandonment."

"As the partnership matures I consciously handed over roles and responsibilities to partners – making it clear what I am doing and why. They were amused at first that I was working so hard to do myself out of what had been quite a powerful role but then they saw that it made sense and they are actually taking on these new things quite willingly."

How do they do what they do?



We will now look at the realities of how partnership brokers do their job. The PBAS logbooks reveal – and to some extent confirm – that where brokers are successful in their work it is due to their ability to undertake a number of roles and to work in a range of ways – both behind the scenes and more publicly.

The more explicit ways of working include:

Asking lots of questions

"I did not seek to engage the partners directly in a conversation on partnering as I did not think there would be a high level of receptivity to that discussion. This approach reflects my own belief about the role of broker as 'process helper'. I framed the discussion around their previous collaboration experiences: What worked and why? What didn't work? What was learnt? What were the implications for their future collaboration? As the relationships progressed, I began to introduce partnering issues into our discussions and asked different questions, for example, how will the need for 'ownership' be addressed?"

"I felt it was very important that the partners did not assume that I had all (or even any!) of the answers. Asking well-chosen questions quickly became fundamental to the way I worked with them. For some, this was irritating as they wanted 'quick fix' solutions but, on the whole, it started to work well and it certainly threw back responsibility onto the group… which was one of my main intentions."

"It took me a while to figure out how to frame questions – particularly 'open' questions. The partners seemed often to push things towards 'closed' questions – but most of the time this was premature and risked closing off essential discussion."

Pushing boundaries and norms

"I was slowly able to shift from a reactive to a proactive role as I gained confidence in the fact that the sustainable partnership agenda I was advancing was principled and meaningful. I introduced the idea that delivering sustainable solutions to development questions in a way that provides mutual benefit is a profoundly different way to approach the planet where the 'winner takes all' or 'growth at all costs mentality abounds."

"It takes a broker with courage, patience and insight to be able to recognise that the push and pull is part of the necessary growing pains for working in a way where equity, transparency and mutual benefit are both the drivers of the process and its outcomes. It is the broker's role to keep the partners focused on the big picture by continually injecting both the reality and the possibility of the situation into the equation."

"The proposed partnership with that particular company was well beyond the normal ways of working for our NGO. My role as a broker was to scope out with internal stakeholders what their concerns were, and create a trust that I would manage the relationship responsibly and with the interests of our organisation in mind."

Working through conflict and confrontation

"I am typically drawn to avoiding or defusing confrontational situations, and yet with brokering, sometimes confrontation is required in defence of foundational partnership principles. But I have learnt that a certain amount of tension is required for a breakthrough, and is not something to be avoided at all costs. Once I saw my consulting work through the 'brokering' lens instead of a 'client' lens, the issue of conflict and uncertainty was no longer a professional threat, simply a natural progression of an issue and one

that could be productively engaged through the active use and improvement of the brokering skill set."

"My role as facilitator is to mange discussions between partners in disagreement. I try to help them focus on the key issues to achieve a conclusion. I try to provide constructive, impersonal, positive feedback with recommendations and suggestions."

" I start by sitting back and seeing if they can solve it themselves, if not I step in and take control to steer the partnership away from confrontation and back to achieving their common goals."

"I tried to develop a 'prevention is better than cure' attitude that prevented many challenges from occurring."

"I make myself available to help solve problems 1-2-1 (away from the partnership meetings) so that the partnership does not get held back and can progress."

The more implicit ways of working include:

Creating a safe space

In any partnership, there are bound to be disagreements. Evidence from the logbooks shows repeatedly that brokers have an important role in creating a 'safe' space when difficult issues or disagreements occur – even when partners do not see that this is what is being done.

"It seems important that partners can operate in their own space at times – where they feel comfortable and at ease. We now meet in the locations of the different partners in rotation – I call it 'playing in everyone's field'…"

"I try to choose the appropriate time and venue for difficult meetings. By ensuring the environment is right and by not putting everything on the table problems were tackled in a better manner."

"When things get 'rocky', I try and adopt a more external role – allowing a more neutral space for a fractious discussion to take place."

"Due to this tension, instead of a formal meeting with many representatives from my organisation, I arranged an informal meeting with my director and the director of the partner organisation. This created a relaxed atmosphere, allowing both people to be more honest and transparent regarding their views of the partnerships, mainly focused on their concerns."

"I met over coffee with the executive director of the partner organisation and discussed the proposal by being completely honest about the dilemma we were facing. This allowed there to be a dialogue that was not confrontational but more of a discussion and gave us a chance to brainstorm some different solutions without the pressure of being with the whole group."

"As the partners were in different geographical locations, I noticed how easy it was for partners to develop their own interpretations of other partner's positions, which led to potentially damaging one-sided pictures. It seemed important to meet face to face whenever we could and if the whole group could not meet, then I would make sure that I went as often as possible to see the partners in their own settings."

Being flexible

"Being a broker in this situation, I find myself sometimes operating as a mediator, sometime as teacher, or even as an interpreter in order to manage differences within partnership."

Whilst few of the log books refer specifically to the flexibility needed to be an effective broker, the evidence that this is the case was there in the many stories of how they had changed direction in response to new demands / situations.

Navigating complexity and anxiety

Those involved in partnerships may feel quite outside their 'comfort zone' – because they are required to operate in unfamiliar ways and with new colleagues from different backgrounds and value-systems. Partnering is always complex and sometimes full of emotional angst (rarely acknowledged), cultural insensitivity (usually ignored) and feelings of hopelessness (when the challenges being tackled seem insurmountable).

Brokers seem to have a key (if subtle) role in bringing their empathy and understanding to what individuals are experiencing.

"When any particular partner expressed anxiety, I did my best to reassure the other partners and show how the current difficulty would not affect the goal of the partnership overall."

"My role in navigating this partnership has been to adapt existing processes wherever possible and to use my people skills to engage peers and senior managers to change embedded patterns. It is important to record that the people who were most helpful in supporting this approach were those working at community and junior staff levels. They accompanied me throughout and were central to making the partnerships happen in spite of all the odds stacked against them."

" When partners seemed to get anxious, I would suggest that as a group we re-evaluate the partnership – so that we could all take time to reflect and to remember why the partnership was created in the first place. These seemed to calm anxieties pretty effectively."

"I came into the partnership at a later stage and had to look back to earlier stages to try and identify what hadn't been covered that may account for the concerns and anxieties now being voiced. I then worked to put those things in place retrospectively whilst also helping the partners not to be bogged down and to keep moving ahead."

"It seems to me that the single most important skill I have developed as a broker is that of holding the complexity of the system whilst at the same time accomplishing basic brokering tasks."

"I came to feel that as a broker it was important for me to focus on the bigger picture of the partnership and its goals – where previously I had been focusing on smaller details such as arranging particular events or meetings. This helped me to see with greater detachment what each partner needed from me as a broker and how I could support them and steer them away from their anxieties towards the bigger goal."

Managing uncertainty and expectations

"We made great efforts to explain our brokering roles to project stakeholders, including how we were there to support them. We also tried to 'hold' the uncertainty experienced by many in the wider project community due to the complexity of the project."

"Always have a Plan B to address or compensate for uncertainties."

"To manage expectations, I worked with partners to build a long-term strategy, which I hoped would help to counter some of the demands to see immediate success and results."

"I always try and encourage the partners to work from the premise that nothing is certain and that a strong partnership will welcome and respond easily to the unexpected. Some of them see this as a potential strength in working collaboratively, others find this idea more daunting."

Understanding underlying interests

" I made myself a check list as an aid to understanding the partners' interests. This included:

- *Looking at the situation from their perspective*
- *Understanding why they were holding back*
- *Developing a new appreciation for identifying their 'position' and trying to understand possible deeper issues*
- *Understanding the drivers – might be going for good results for the wrong reasons*
- *Dropping my own preconceptions – reminding myself often of the importance of keeping a genuinely open mind."*

"There are real challenges for a partnership broker in the process of managing different interests and some motivations may be not be transparent – especially if there are diverse motivations within the group."

" I felt it was really important to stay well informed and understand why partners make certain choices and decisions so that I could step in and clarify issues with others when necessary."

"I found it very important to be well researched when meeting with the partners, to understand how they were going to approach the project and what their interests would be. I understood that the private sector had underlying commercial interests and that was why they were in the partnership, so was well prepared with information about this when I first met with them."

"The private sector had reservations about working in partnership with the government as in other situations the government had been corrupt and either only wanted to extort bribes or 'freebies' from the companies. I spent some time assessing the main obstacles and risks and what the shared interests could be, and then used a meeting to help the private sector see how they could impact the government if they were working in partnership."

Influencing without direct authority

"I had to learn how to broker while looking like I was doing other things!"

"I had to learn to 'direct' from a distance and to get out of the habit of needing to control every aspect of the partnership but rather to lead partners in the right direction from behind rather than from in front."

Transforming transaction into collaboration

"I think it is important for brokers to help transform the way people work together; they should empower people to self-manage and work collaboratively and in a way that does not create dependency on the broker. Facilitation has never been my 'thing' but I found that if I approach facilitation from a more 'transformational' perspective – by focussing on enhancing the quality of conversation and the relationships of the partners, as well as by making sure that the responsibility for problem-solving and visioning lay firmly in the participants' realm – this freed me up from my concerns about having to have answers and provide solutions, and was a more powerful way to serve the partnership."

" By assigning roles to each of the partners early on, we ensured their buy in as they felt they owned the partnership. They moved from simply protecting their own interests in a series of 'transactional' agreements to working genuinely as a group. Quite a new experience for most of them!"

What gets in their way?

Despite their best endeavours, brokers (like other professionals) face a number of challenges that can get in the way of doing the best possible job. The first category of these challenges are those that come towards the broker from within the partnership, the second, are those that come from beyond the partnership and the third, are those that arise from the broker's own professional limitations.

1. Challenges from within the partnership

Scale and diversity issues

"This partnership was a nightmare – there were 17 partner organisations and I seemed to spend my time grappling with each partner's very different needs. It took forever to get to the point were the group could operate as a partnership and make any progress at all towards building a solid programme of work"

"Each partner had its own systems to navigate – some would take months for an internal decision to be reached, others would make inappropriate decisions instantly and then get frustrated with delays from others."

"Dealing with the existing protocols of government slowed everything down – it was as if they did everything possible to get in the way of decision-making and progress."

"I seemed to be constantly battling between bureaucratic decision-making and technocratic implementation"

"There were many times when I was nearly overwhelmed by the sheer levels of dis-functionality – I began to understand why the world was in such a mess when no institution seemed capable of making and following through on essential decisions."

Changes of partner personnel

"The partnership was a long-term arrangement which meant that individuals representing the partner organisations joining came and went. It was almost impossible to feel we were building from one year to the next as we seemed repeatedly to be pulled back to the beginning."

This was one of the most frequently cited challenges reported in log books – it was, however, notable that there were relatively few suggestions about how to address the issue.

Partner expectations

" I realised early on that the partners had very high expectations. As I understood it, they expected me to:

- *Deepen partner & stakeholder engagement*
- *Strengthen partnering skills and capacity*
- *Support them in joint planning*
- *Build new accountability procedures*
- *Explore delivery mechanism options with partners*
- *Help the partnership achieve reach and influence*
- *This seemed like a pretty daunting list!"*

"I was brought into the brokering role after my predecessor has been under-performing for some time. I was unsure how to manage the fact that I knew that my own organisation was under-committed and therefore was not moving the partnership on at the speed the corporate partners wanted. I felt I was having to play a game of 'smoke and mirrors' to ensure the corporate did not become frustrated with the partnership not progressing. This raised real moral issues for me in the brokering role."

Being perceived as too 'hands on'

"Maybe I became too close to the partners and the whole thing became too personal with social activities – some partners began to resent it."

"Some partners felt that I was providing too many solutions to problems and this was not how they understood my role."

"I was seen as the main contact for the partnership – but this seemed to slip very quickly into me doing all the work and partners simply handing everything over. Then at a later stage I got a lot of feedback that the partners resented how much initiative I was taking. It seemed like a bit of a 'no-win' situation."

"I sometimes felt as if I was Shiva – with many hands – as it seemed that I was managing everything. It was exhausting and the partners didn't really appreciate my efforts – just criticised me for doing too much."

Being perceived as not 'hands on' enough

"I had yet another phone call today saying that I was not taking enough control over the partnership and that we were wasting time because I was allowing so much discussion and not pushing to decisions and action. It seems I can't win! Half the group think I am doing too much the other half complain that I am doing too little."

Partner dependency

"After the scoping stage, I was worried that the partners were all waiting for me to be an intermediary before they would take any actions rather than starting to work together."

"I realise that I have been too much of a bridge between the three organisations because when I was absent for any period of time, there would be absolutely no communication amongst the partners. It is clear that there is far too much reliance on me as a broker."

"To reduce what I began to see as an unhealthy dependency on me in the brokering role, I identified one individual from each partner organisation to act as a 'champion'. The champion would be someone who is more committed to achieving agreement and would act as a 'voice of reason' at times of disagreement. These individuals won't necessarily be formally recognized within the partnership but I will attempt to provide more time nourishing their participation and build their capacity."

"I decided to use 'silence' as a negotiation tactic and to refrain from responding to the hostile email sent to the group. In the past, partners had looked to me to take a lead in these situations, but I felt by responding I would be articulating my own position rather than eliciting the opinion of the partners plus I wanted the partners to feel incensed enough to respond and articulate their own thoughts without being prompted by me."

"I got plenty of private calls from various representatives expressing their concerns as if they were handing to problem over to me to sort out. When I encouraged them to share their thoughts in writing with the rest of the group, they refused due their perception that this would be too 'high risk'. I was asked to intervene but I refused since it did not seem an appropriate role for me as a broker."

"There have also been instances where the partners just refuse to interact with one another and have expected me to do all the work. Although I see my role as helping the partners, it is vital that they also step up and learn how to deal with issues on their own."

2. Misunderstanding / lack of knowledge of the brokering role

Both internal and external brokers report on the challenge of being at their most successful when most 'invisible' and how hard it is to strike the balance between being seen to 'add value' whilst believing that the role requires a certain level of empowering others and not doing everything themselves.

It seems clear that there is really quite a low level of understanding amongst partners, donors and other stakeholders about what partnership brokers do and why they do it in a particular (perhaps rather unconventional) way.

Internal brokers report	External brokers report
• Being seen by partners as biased in favour of their own organisation. • Being seen internally as being biased towards the partners' interests. • Not being given credit for being able to be an organisational representative and a broker. • Being seen as solely responsible for all the partnering issues that arose. • Being expected to have answers for anything that was controversial. • Line managers failing to understand how much time was needed for the brokering work and just attaching it as an 'add on' to the regular job. • Feeling compromised by their own organisations using the partnership to play their internal battles. • Serious lack of internal support from their own organisation. • Seen as 'piggy in the middle' between the organisation and the partners – not as the relationships and process facilitator. • Their organisation being far more concerned with the value they are getting from the partnership rather than the value they are giving – and the broker getting criticism for focussing on the latter not the former.	• Being seen as 'the expert' with all the answers rather than a skilled intermediary. • A lack of belief from partners / donors that investment in brokering (ie paying the costs of an external broker) was value for money. • Being given a lot of responsibility but having no authority with partners or their organisations. • Pushed into finding 'quick fix' solutions because of the role being temporary / short term. • Lack of awareness of earlier history was used as a rationale for ignoring the broker's views – even where they had comparable and useful experiences to contribute. • Being seen as an 'outsider' therefore someone who did not understand the situation and therefore only able to play a very subordinate role.

3. Challenges from their own professional limitations

Issues of competence

"During our meetings, I had some real problems with communication and real difficulties in integrating all the parties involved equally."

"Facilitation is not as easy as some people believe. Sometimes we think that people are listening but clearly they have not listened at all if you look at the follow up after meetings."

"I attempted to use facilitating skills by listening well, including paying attention to what was not being said, observing people's emotions and trying to truly understanding everyone's interests… but it was tough and really very little was achieved. I just don't think I did a very good job."

"I found it hard to manage trust issues, sceptical attitudes towards the concept of partnership and general resistance to change."

"I often felt after meetings with the partners that I had failed to create the conditions for dialogue, and that I was talking too much myself. This meant that partners were not engaged in the partnership actively enough and that they did not have an opportunity to explore what their contribution could or should be."

"I have also learnt that you can be too nice to the partners and allow bad behaviour to continue… in reality as a broker I needed to be much more detached and more accomplished at mentoring partners."

"Brokering is complicated and requires a slew of skills and competences – I feel I make some progress in a number of areas and then get caught out by some poor work. Will I ever be skilled enough to do this really challenging role?"

Issues of confidence

"I was very conscious of feeling young and inexperienced (or perhaps I was just anxious about the partners thinking I was young / inexperienced). In order to be more effective, I really need to be more confident."

"To be honest, it was quite tough being young, female and black in a brokering role where almost all the people I was dealing with were older, male and white!"

"I am well used to managing quite complex and high value projects but operating as a broker requires quite different skills. I find it much harder to focus on the questions than being the person with all the answers."

Personal bias

"I found that I had a tendency to champion the weakest or least powerful member of the partnership, rather

than facilitating a more equitable relationship within the partnership. My position became resented both by those I was championing and the others."

"I sometimes find it very hard to stop my personal opinions affecting my work."

"It is hard to find the boundary between what partners know of my views as an individual and how they see me operate in the brokering role where it is so important that I remain neutral."

Being overwhelmed by dysfunctional partnerships

"It is tough to have my optimism crushed repeatedly by a dysfunctional partnership."

"I work out of a belief that we can do better, that we can improve the living standards of those living in poverty and share the wealth of developed countries equitably. This is what drives me as a broker. Often I wonder why this belief is not shared by those around me. Sometimes I am just tired of the struggle and wonder if I am foolish… maybe I should just accept things as they are."

"Partnerships need to be balanced – with the right skills, power relationships, control mechanisms and a sharing of risk and vulnerability. Sometimes we seem to be a million miles away."

Failing to admit that partnership may not be the answer

It is worth noting that only on very few occasions did trainee brokers writing in their logbooks raise fundamental questions about whether or not this was a suitable context for a partnership approach, or even if this particular partnership was the only partnership option. It may be that brokers have too much personal investment in the partnership succeeding to be able to make this judgment dispassionately. Or it may be that they truly believe that a partnership will work if they can support it strongly enough – even holding on to this view when there is compelling evidence that this is wrong.

"I can't decide if I'm being optimistic, stubborn or delusional but we have committed a great many resources to this partnership and I believe, if nothing else, that it's still possible to learn something from it if we keep at it. So we keep going. Is this the right decision?"

Broker needing too much control

A challenge spotted by one of the PBAS mentors was described as follows:

"Brokering often attracts entrepreneurial thinkers and problem solvers i.e. people who want to get things done. I've seen tension develop when brokers act on their own accord before checking the buy-in and pulse of the rest of the partners (for example, drafting strategy in a vacuum first before consulting the partners for their ideas). When the broker is the primary driver for a partnership idea or the primary fixer of a partnership problem, there is a risk (in addition to personal burn-out) that they no longer represent the interests of the partners."

Broker over attachment

A challenge that brokers refer to in their logbooks quite often is their inability to detach themselves enough from the partners and / or the partnership. Being passionate about their work and about the potential they can see for partnering solutions sometimes gets translated into needing the partnership to work for their own emotional / professional satisfaction.

"I knew that once the partners were communicating well, collaborating on the projects and had systems in place for dealing with any future difficulties, I needed to step back. But this was not an easy process – I found it hard to untangle whether my reluctance was out of genuine concern of what might happen without me or whether I just didn't want to let go. I am still working this out."

As mentioned above, there is far less data on the broker's role in the final phases of the partnership cycle. Since so few partnership brokers have yet worked through every phase of a partnership, it is not surprising that there is sparse coverage in the log books about the 'moving on' phase.

This will come in due course.

Equally un-recorded in the logbooks is the process of the partnership broker extracting him / herself from the brokering role. Considerable further work is needed to examine how brokers know when the time is right to exit from their brokering role and, as importantly, ho best to manage their own 'moving on' process.

Meanwhile, it is important to try and assess what difference partnership brokering makes – we attempt to do this in the following section.

"Building partnerships is time consuming and does not always go to plan: effort and time is invested in addressing differing positions, interests and needs. It needs focus, attention to detail and disciplined application all the time.

I try hard to focus on a finite portfolio of partnerships and tasks in order to manage what could quickly become an overwhelming workload. I also try and work within the limited resources (people, time, money, opportunities) that are available to me. This has meant juggling and keeping the balance between working systematically towards planned outcomes and taking on entrepreneurial, unplanned activities.

Re-reading my logbook, I realise that I have leaned towards delivering on planned outcomes. Perhaps because I judged this is what the partners wanted me to do. But I also think it might be a result of feeling less confident about 'out-of-the-box' approaches and / or whether or not I had 'permission' to be more innovative."

Partnership broker interview

The ways in which partnership brokers make a difference to multi-stakeholder partnerships appear to fall into two broad categories:

1. By helping partners to address typical partnering challenges
2. By improving a partnership's efficiency, effectiveness & innovation

We summarise the findings under these three headings for ease of reference.

By helping partners to address typical partnering challenges

The logbooks yielded information on a number of approaches by brokers to help partners address typical partnering challenges. These include:

> *"How do I as a broker address common partnering challenges?*
> - *By meeting them head on – taking control*
> - *By undertaking thorough research into the source of the challenge*
> - *By helping partners to see / recognise / understand why the challenges exist."*
>
> *"How do I address common partnering challenges?*
> - *Keep calm!*
> - *Promote very good teamwork*
> - *Know the background of the problem*
> - *Keep partners as comfortable / happy as possible whilst we work through the challenges*
> - *Practising a "prevention is better than cure" attitude which prevents challenges from occurring."*

> *"How do I address common partnering challenges?*
> - *I have a Plan B in case Plan A doesn't work!*
> - *Keep partners, stakeholders, and 3rd parties well informed of all activities and decisions*
> - *Make sure there is culture of clarity / openness within the partnership*
> - *Take control of negotiations – when it is necessary."*

> *"Partnerships can deliver immeasurable intellectual capital (mutual learning between business and NGOs) social capital (networks and relationships) and the human capital (volunteering), as well as financial and physical capital. But we need to keep working on ways of communicating these outcomes. The language used in this area is often complex, and this can lead to confusion. This is a real challenge – how do you communicate complex concepts and systems in simple language?"*

> *"Developing and maintaining partnerships isn't easy. It is complex, throwing up constant challenge. I ask myself on a regular basis:*
> - *Are there other ways this outcome / objective could be achieved that would be more cost effective / sustainable?*
> - *Are the desired partnership outcomes things that neither party could achieve alone?"*

We thought it might be a useful exercise to consider a list of typical partnering challenges[1] and see whether the brokering activities recorded in the PBAS logbooks addressed these issues – and if so, which and how.

1 The headings of each table and the information in the left hand columns is taken from *Talking the Walk - A Communication Manual for Partnership Practitioners* - published in 2008 by The Partnering Initiative.

Terminology and language

Partnering challenges	Potential value of brokering interventions
• Divergence of views / understanding of key terms (e.g., "project", "partnership", "community", "sustainable", "development"). • Jargon from each sector being incomprehensible and alienating to the others (e.g., "market analysis", "participatory appraisal", "social needs assessment").	• Logbooks recorded reoccurring patterns in terms of partners not having a shared understanding of key terminology. Many, for example, used the term 'partnership' to describe a 'project based alliance', 'financial assistance' or a 'donor-recipient' relationship. These types of 'partnership' are at odds with a definition of the term that suggests mutuality in risks and benefits. • Brokers also report on the need to act as a translator / interpreter – particularly in multi-sector partnerships where there is not only different terminology but also a different attitude to certain situations.

Context and culture

Partnering challenges	Potential value of brokering interventions
• Cultural diversity often being as big a challenge as sectoral diversity – but usually unacknowledged and unexplored. • Partnership being developed in a vacuum without real engagement with the local community or recognition of the contextual constraints.	• Challenges arising from cultural diversity seem to be significant but are almost always 'un-discussable'. This not only causes hidden confusion, discomfort and disconnect but it also suggests that partners are willing to submerge their individuality / identity and to adopt a partnership identity. It can only be speculated as to what is lost of potential value to the partnership in this process. • Some brokers explore their role in helping partners to learn how to be comfortable with each other and with the range and diversity in the group. • Others question their own competence in dealing with issues of diversity and feel they need more guidance in this area.

Equity, power and leadership

Partnering challenges	Potential value of brokering interventions
• Unspoken but strongly felt power imbalance between partners. • Leadership being all too often assumed by the person with the highest external status, organisational authority or resource contribution, rather than being shared between partners.	• Brokers see that it is necessary to address issues of power – particularly where it is exercised unhelpfully and hindering engagement or progress. They do, however, raise questions about how far they are entitled to challenge the status quo. • The solution most favoured by those in the brokering role seems to be to raise the issue with partners and to work with them to suggest better behaviour and more equitable practices.

Transparency and trust

Partnering challenges	Potential value of brokering interventions
• Suspicion that certain partners are not being honest about their motives for partnering. • Despite partners talking about trust, a sense that the levels of trust are rather superficial and will not stand up in a crisis situation – evidenced by partners resorting to blaming each other very quickly if things go wrong.	• Despite the fact that partners often talk about trust, they often remain suspicious with regard to each other's transparency and motivation. • Brokers often report their role in helping to build more understanding (that in due course leads to trust) by encouraging open engagement, honesty and constructive challenge between partners.

Partnering and the public sector

Partnering challenges	Potential value of brokering interventions
• Partnerships incorporating public sector partners because they think they have to, without really finding ways of accommodating their interests or needs. • Public sector-initiated partnerships being too much like "business as usual" and not building on the potential of the partnering relationship to be more innovative.	• The public sector – specifically government – is widely reported by brokers as being the most intractable of the three sectors. This sector seems to be the most reluctant to cede any level of control and to want partnerships 100% on their own terms. • It becomes a major focus for brokers to challenge this and to make a convincing case that the benefits from 'letting go' – to at least some extent – will outweigh the risks.

Exits and exit strategies

Partnering challenges	Potential value of brokering interventions

• Too often a poorly planned and managed process – retrospectively damaging the work of the partnership.
• Rarely explained well to external audiences and therefore interpreted as a partnership or partner "failing" rather than "transitioning".
	• This is a somewhat unexplored area for partnership brokers to date. However, the contribution brokers do make includes:
	    • Introducing the need to consider exit strategies early on in the partnership's life cycle
	    • Using 'moving on' as a preferred term because it implies more options
	    • Being able to articulate and present a range of options for partners to consider

The controlling hand of (external) donors

Partnering challenges	Potential value of brokering interventions
• Donors not understanding the partnering process and the time required to build strong and productive collaboration. • Donors expecting conventional reports, assessment or monitoring procedures, which too often restrict rather than enhance the partnership's operations and flexibility.	• Brokers report that very often external donors fail to understand the partnering process. This can mean not seeing that their reporting requirements or expectations are, at best, unrealistic and, at worst, undermining the partnerships they are seeking to support. • A growing role for brokers is to act as intermediaries between the partners and the donor agencies encouraging them both to explore a new type of relationship. • However, some brokers have encountered situations where some partners have been reluctant to encourage external donors to become more involved – perhaps fearing too much unhelpful interference rather than deeper understanding.

Failure to learn from mistakes

Partnering challenges	Potential value of brokering interventions
• Partners not taking time to reflect on the experience but "keeping going", even when there might be better ways of proceeding. • Partners failing to internalise lessons that emerge (e.g., from reviews or case studies) and therefore not benefiting from others' insights.	• Many brokers believe that the best partnerships are those that operate as learning organisms – capable of understanding challenges, working them through systematically and changing their practice as a result of experience. • This requires a certain style of brokering – where assumptions are challenged, behaviour is modified and time is allocated to reflecting on and internalising lessons.

Playing the partnering game

Partnering challenges	Potential value of brokering interventions
• Using the term "partnership" to describe activities because it is politically correct, not because it accurately describes the nature of the relationship or the approach to the work. • Partners pretending to be serious about collaboration, but in reality seeing it as peripheral and not in any way adjusting their behaviour.	• One of the recurring challenges that brokers faced was partners simply using the term 'partnership' to describe a relationship (often at a superficial level) but not putting in the effort needed to understand the implications of a partnering approach or to carry out their obligations as partners. • Some brokers are brave enough to address this – for example by asking each partner how they understand the term or by suggesting that they might re-consider if a partnership is the right vehicle for their interests / needs. • Many brokers recognise the need to push partnerships beyond the merely transactional and some fear that partnership as a paradigm may become discredited if those who do little more than pretend to partner are not challenged.

Focus on 'impacts' as opposed to 'value'

Partnering challenges	Potential value of brokering interventions
• Partners believing that it is the only valid to seek project achievements, rather than the added value of the process for their own organisation / priorities. • Informing external audiences of project achievements rather than wider, more strategic benefits.	• This is an area where brokers see considerable potential and feel that they can intervene in a helpful way. • Several report that they have used a systematic, highly participatory review process to encourage partners to explore whether the partnership is meeting their own organisation's goals and adding genuine value (assessed by benefits significantly outweighing transaction costs). • They also report that it is quite hard to persuade partners that an enquiry into the benefits they have received (as opposed to evaluating project activities and interventions) is not only legitimate but important.

By improving a partnership's efficiency, effectiveness & innovation

Many partnership brokers report that it is their particular mix of skills (in facilitation, relationship-building, interest-based negotiation, communication and process management) dedicated to supporting the partnership as a whole that combines to make a difference.

> *"An appropriate mix of skills and competencies, combined with the trust and respect the partnership broker engenders amongst the key protagonists, is what will lead to them making a credible and valuable contribution."*

Perhaps one of the partnership broker's most important (if subtle) contributions is to 'role model' good partnering behaviour.

Several brokers report that there are specific activities / approaches that make a difference in terms of the partnership's efficiency and effectiveness. These include:

- Ensuring clarity / helping partners to understand each other better
- Keeping up momentum and pace
- Steering partners back to genuine collaboration when certain partners try and takeover
- Keeping consistency, continuity and focus
- Encouraging creativity from partners
- Ensuring all parties are well informed and are getting exactly what they need
- Bringing in 3rd parties / external brokers / technical experts when needed.

Some organisations (like the NGO in Jamaica where an evaluation of the partnership broker's effectiveness was carried out) actually see investment in partnership brokering as real value for money – proposing to move away from an office and administrative functions in favour of a more flexible partnership approach coordinated and managed by a partnership broker.

In the logbooks there is very little mention of the partnership broker's role in promoting innovation. This is quite surprising given that the issue of the broker's role in promoting innovation features quite strongly in the Partnership Brokers Training and gives pause for thought.

Perhaps the reality is that other areas (eg relationship-management) take precedence. Is the assumption that partnership brokers may push partners towards more innovation / out of the box thinking incorrect? Or is it simply not recognised or reported on?

It would be good to undertake a study of this specific issue in order to understand better whether greater innovation is or is not a significant outcome of partnership brokering.

Section 4: Further enquiry

"We have made a start, our future enquiry should continue to be guided by the concept of 'prosumers' whereby producers are simultaneously consumers. In other words, the partnership brokering universe or constituency is both the source and one of the main beneficiaries of our enquiry activities in a demand-driven market place. Generating questions and possible answers can and should be inspired and managed in direct relation to usage, interest and need."

PBAS mentor and Research Advisor

What have we learnt?

It feels as if we have learnt a lot from this exercise – quite a lot of detail and depth into what partnership brokers are doing on a day-to-day basis and where their interventions appear to be having some marked impact.

We have learnt, for example, that partnership brokers:

- Spend considerable time on relationship-building and relationship management.
- Exercise a range of specific skills that also demonstrate approaches that partners can adopt and use themselves.
- Assist partnerships by pulling partners together when they fall out with each other and by pushing them to achieve more.
- See real value in becoming more 'reflective' in the way they approach their work.

All this (and far more that emerges from this data) suggests that partnership brokers are useful – perhaps more than that – in helping to make multi-stakeholder partnerships for a sustainable world more effective.

What we cannot say we know from this enquiry is:

- What reported achievements can genuinely be attributed to the broker's work as compared with what might have happened anyway.
- That the benefits of partnership brokering clearly outweigh the costs involved.
- What limits a partnership broker's ability to make a difference (whether in terms of competence, actual / perceived status or the context in which they are operating).

And we know that a number of issues have not been covered (for various reasons, some of which are suggested in the earlier text). These include:

- The role partnership brokers can play in helping partners to 'move on'.
- How partnership brokers understand and implement their own exit strategies.
- Whether partnership brokers have a role in pushing partnerships to be more innovative / transformational.
- How the role of a partnership broker may differ in the context of different types of partnership (global/ strategic as compared with local/operational, for example).

What is needed now?

Partnership brokers, partners, line managers, donors and decision-makers may all need to know about:

- The boundaries to brokering – **what brokers cannot do**
- When not to have a partnership broker – **what brokers shouldn't do**
- The moment when partnerships are so effective that a broker is no longer necessary – **when brokers have completed their task.**

Partnership brokers may also need to know how partners, donors, decision-makers and others view their role / interventions / effectiveness – and what more evidence they require to enable them to make better use of partnership brokers in future.

In addition to these things, we also undoubtedly need:

- More feedback from partners (ie those who have been 'brokered').
- More feedback from those whom the partnership's programmes of work aim to impact.
- Case studies that compare brokered and un-brokered partnerships.

There is a lot more to do!

How will we proceed?

A key part of the work of the Partnership Brokers Association is 'learning' – by which we mean really studying partnership brokering as a profession and by making available experiences, lessons and critique from / to those operating as partnership brokers in the widening network (670 at the last count and increasing every time there is a new Level 1 Partnership Brokers Training course).

We have developed an approach and a number of tools for assessing the work of partnership brokers (see last page for details of how to access) and we welcome commissions or requests for further work in this area.

We believe multi-stakeholder partnering is extremely important to the sustainability of our world – as Peter Senge suggests (and as we quote as the opening to Section 1 of this report):

> *"...A sustainable world will only be possible by thinking differently – by learning to see the larger systems… and by fostering collaboration across every imaginable boundary."*

The continuing challenge for us (and for all our partnership brokering colleagues) is to demonstrate that a partnership broker (or – perhaps more accurately – partnership brokering) really is central to partnerships playing their critical part in building a more sustainable world.

We look forward to continuing this quest over the coming months and years.[1]

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1 If you want to know more about our enquiry approach go to www.partnershipbrokers.org/learning or contact the Partnership Brokers Association: info@partnershipbrokers.org

References

The material for this report was drawn mainly from the logbooks compiled by partnership brokers as part of a formal accreditation process. These individuals come from many different parts of the world, a range of operating contexts and from all societal sectors so we feel they are a fairly representative sample.

Several mentors from the Partnership Brokers Accreditation Scheme (PBAS) gave their observations based on mentoring a number of partnerships brokers and assessing their logbooks – thanks to them too for their in-puts and their continuing work to support partnership brokers in their day-to-day work.

In addition, we were able to draw on three other main sources:

- A number of essays by partnership brokers outlining their partnership brokering 'journey'.
- Short 'think-pieces' published in **Partnership Matters** Volume 4 about the importance of reflective practice to partnership brokers.
- An evaluation of a partnership broker undertaken by Surinder Hundal for **Oxfam**.
- Certain frameworks and other information were taken from **The Partnering Toolbook** series published by The Partnering Initiative (www.ThePartneringInitiative.org) and from Level 1 of the **Partnership Brokers Training** course (www.partnershipbrokers.org/training) – see footnotes in text for details.

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Most of the real work for this report (by which we mean the hard slog of reading through 250 logbooks!) was undertaken by Priti Bhattarai, Akua Boateng and Francesca Rhodes between April and September 2011 – without them there would be no report and we are very grateful to them for their perseverance and for their intelligent analysis of what they read.

The overall structure and the connecting narrative was provided by Ros Tennyson, who was one of the founders[1] of the original Partnership Brokers Accreditation Scheme (PBAS) in 2003 and was, until December 2011, the Director of the Partnership Brokering Project as part of her Senior Partnership Adviser role with the International Business Leaders Forum.

Emily Wood, Manager of the Partnership Brokers Association, provided the keen editorial eye and designed the final version of the report.

1 Dr Michael Warner being the other founder.

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