



The Current Status of Remote Partnering

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1. Introduction

With the global emphasis on partnering as the most-likely-to-work mechanism for inclusive, innovative and sustainable responses to intractable challenges¹, it becomes ever more important to really study partnering in order to understand the paradigm – its actual limitations as well as its potential strengths. Across the globe there are a number of entities enquiring into what it takes to partner effectively², with a growing focus on the partnering process. This is to be welcomed as, to date, many partnering endeavours have fallen short of expectations and hoped-for goals and yet partnering continues to be positioned as the mechanism for new and sustainable solutions. However, despite the fact that many (perhaps most) partnerships operate remotely, this fact has attracted very little in the way of action research and innovative thinking.

In fact, many see remote partnering as a major reason for their partnerships falling short or even failing. But does it have to be this way? What if we address remote partnering as an opportunity rather than a problem? What if we systematically explore some of the positive advantages of working long-distance? These questions form the starting point for our research on remote partnering.

In this paper, which is the first formal output of the Remote Partnering Project, we seek to understand the current status of remote partnering. To this end, we have undertaken:

- **Literature / desktop research** – what has been written in academic papers about the topic (lucky for us that one of us – Anne Marike – is actually an academic!)
- **Interviews** – with a selection of front-line practitioners with partners and staff from the British Red Cross, DEPP³ programme and PAX⁴
- **On-line survey** – with partnership brokers (trained by PBA⁵ in partnership brokering skills)
- **Facilitated conversation** between 12 practitioners as part of a PBA training in Advanced Partnership Brokering Skills
- **Review** of a number of published case studies to ascertain whether (or not) remote partnering features as an issue in their analysis of partnering challenges and opportunities

Bringing this all together in an accessible and sense-making format has been really quite interesting – both for what we have uncovered and for what we are quite surprised (and disappointed) not to have discovered.

¹ See for instance <http://effectivecooperation.org/about/about-the-partnership/>

² See for instance <http://www.effectivepartnering.org/about-pep/>

³ Disaster and Emergency Preparedness Programme

⁴ PAX for Peace

⁵ Partnership Brokers Association



I'm always intrigued by 'turning things around', so in this case, looking at something that is assumed to be a hassle, and asking what makes it work, I heard great stories from people who are actually doing it and who are very strongly and intrinsically motivated to do what they do, which is a treat.⁶

In **Section 2** (pages 4-9) we summarise what academia tells us – more about remote team working than remote partnering, but we figured there are enough overlaps to make this valid (and in any case there was relatively little about remote partnering per se).

In **Section 3** (pages 10-19) we pull together the findings from our disparate interviews, survey, facilitated conversation and case study review – this is the heart of our work to date based, as it is, on the hard-won lessons of practitioners in a wide range of challenging contexts. How do those in the field experience remote partnering? What are their typical ways of working? How is the concept understood? What are the main challenges and opportunities? Can we harvest some ideas from where remote partnering is working brilliantly – or, at the very least, how it could be improved?

In **Section 4** (pages 19-24) we take a different, more personal, approach. What drew us each to this project? What did we expect / hope for / fear? And how our reactions compared and contrasted when we first shared our thoughts on what we had found out from the project so far. We are strong believers in acknowledging the importance of individuality in partnering work – and research should be no exception – since we know we all bring our own biases, mind sets and frames of reference to the task.

In **Section 5** (pages 24-27) we explore how we plan to deepen (and challenge) our insights by inviting others to share their views (via our project website⁷). We also lay the foundations for the project's next phase – where the team will be coordinating a series of **design and creativity workshops** in four locations (January to March 2017) – offering the opportunity to radically re-think and re-imagine how remote partnering could be an exciting alternative to face-to-face partnering with added value in its own right.

Of course, in order to study it, we felt from the start that we must be clear about what the term 'remote partnering' actually means. To the best of our knowledge, the literature does not offer any precise definitions of the concept. Within the research team, we have had several conversations about how we understand it, and we agreed to work with the following definition:

Remote partnering refers to groups of people working together from different entities as part of a structured partnership who share a common social or environmental purpose and are accountable to each other, but who largely work long-distance across different locations, cultures and time zones rather than face-to-face.

⁶ During the research process, we set up a 'team log' on-line that reveals some further reflections on how our ideas were emerging during the research phase – we have included some entries into the log throughout this report.

⁷ www.remotepartnering.org

This definition contains several elements that are relevant to our enquiry. First, in a partnership, the people working together are from different entities (organisations or communities for instance), and this sets it apart from working in a team, where you would find people who all belong to the same entity. Second, we focus on partnerships for humanitarian response and assistance as well as for sustainable development and thus the remote partnerships we are concerned with all have a social or environmental purpose. Third, being 'remote' means that those involved are in different geographic locations, but also operating in time zones and cultures, and this is likely to pose significant additional challenges.

Lastly, those working remotely can (and do) also meet face-to-face. In fact, we all smiled at how often the reply to us asking '*what would make a difference to your ability to work remotely?*' the response was '*meeting face to face*'! So face-to-face partnering still seems to be the default position – we hope that this project will change that because we have found ways to make remote partnering a first choice, not second best.

2: Reviewing the literature⁸

Introduction & Methodology

The partners agreed that undertaking a literature review of any research on the subject of remote partnering would be a very good place to start. It was felt that such a study would provide a solid foundation to our action research and, in due course, to our workshops exploring dynamic new approaches to partnering 'long-distance'.

In order to explore what has been published about remote partnering in the academic literature, a reasonably systematic search was conducted. The database used was *Web of Science*. Because of the rapid developments of Skype and other tools used in remote partnering, the search was restricted to papers published since 2006. This paper draws together what was found and suggests some areas that seem ripe for the project team and partners to explore further.

Search terms used

1. Remote partnering

Many of the results found were in categories such as computer science, robotics and artificial intelligence (probably because of the word 'remote'). Therefore, results were refined by checking the boxes for Telecommunications, Multidisciplinary Science, Psychology, Management, and Social Sciences.

Results were scanned for relevance. Those that appeared relevant from the title and abstract, were selected and saved. This led to the following results:

⁸ The literature review was undertaken by Anne-Marike Lokhorst on behalf of the Partnerships Resource Centre, Erasmus University (one of the project's founding partners)

- **Berchicci et al.**, 2016: Remote collaboration and innovative performance: the moderating role of R&D Intensity. *Industrial and Corporate Change*, 25, 429–446.
- **Capaldo et al.**, 2014: Partner Geographic and Organizational Proximity and the Innovative Performance of Knowledge-Creating Alliances. *European Management Review*, 11, 63-84.
- **Mueller et al.**, 2013: Gaze transfer in remote cooperation: Is it always helpful to see what your partner is attending to? *Quarterly journal of Experimental Psychology*, 66, 1302-1316.
- **Bazarova et al.**, 2009: Attributions in Virtual Groups Distances and Behavioral Variations in Computer-Mediated Discussions. *Small Group Research*, 40, 138-162.

The references used were then checked, as well as the papers citing the result, using a snowball method. This resulted in the following results:

- **Cramton et al.**, 2007: Situation Invisibility and Attribution in Distributed Collaborations. *Journal of Management*, 33, 525-546.
- **Gibson et al.**, 2006: Unpacking the Concept of Virtuality: The Effects of Geographic Dispersion, Electronic Dependence, Dynamic Structure, and National Diversity on Team Innovation. *Administrative Science Quarterly*, 51, 451-495.

2. Remote collaboration

- **Eligio et al.**, 2012: Emotion understanding and performance during computer-supported collaboration. *Computers in Human Behavior*, 28, 2046-2054.
- **Cheshin et al.**, 2012: Emergence of Differing Electronic Communication Norms Within Partially Distributed Teams, *Journal of Personnel Psychology*, 12, 7-21.

3. Distributed collaboration

- **Hill & Bartol**, 2016: Empowering Leadership and Effective Collaboration in Geographically Dispersed Teams. *Personnel Psychology*, 69, 159-198.
- **Bosch-Sijtsema et al.**, 2011. *A Framework to Analyze Knowledge Work in Distributed Teams. Group and Organizational Management*, 36, 275-307.
- **Nurmi**, 2011. Coping with Coping Strategies: How Distributed Teams and Their Members Deal with the Stress of Distance, Time Zones and Culture. *Stress and Health*, 27, 123-143.

4. Distributed partnering

- **Fayard et al.**, 2014: The Role of Writing in Distributed Collaboration. *Organization Science*, 25, 1391-1413.
- **Pena et al.**, 2007: Effects of geographic distribution on dominance perceptions in computer-mediated groups. *Communications Research*, 34, 313-331.

5. Dispersed collaboration

- **Malhotra et al.**, 2014: Enhancing performance of geographically distributed teams through targeted use of information and communication technologies. *Human Relations*, 67, 389-411.

- **Maynard et al.**, 2014: The Role of Shared Mental Model Development in Understanding Virtual Team Effectiveness. *Group & Organization Management*, 39, 3–32.

6. Dispersed partnering

No new papers found.

In total, 15 papers were collected.

It is important to note that not all of the papers collected are about partnering per se. Some, for example, look at remote collaboration in terms of teams (e.g. Bosch-Sijtsema et al.). We believe that there is a difference between working remotely as a team and working remotely as a partnership since those working in teams are usually part of the same organisation, whereas those working in partnerships are representing different organisations. Whilst there may be some similarities in the experience (sense of isolation, communication challenges etc) that can be usefully compared, it is not unreasonable to assume that those working in teams are linked by a degree of organisational culture, history and goals in ways that those working in remote partnerships are not.

It is not possible to determine how exactly these differences play out in this study, but it is important to acknowledge that they exist.

Findings

What do these papers tell us? A couple of strong themes emerge.

Berchicci et al describe how collaboration with geographically distant partners may enhance a firm's innovative performance. They also note that communication challenges between remote partners might hamper effective knowledge transfer, and argue that R&D intensity is key. R&D intensity refers to the company having more absorptive capacity: the ability to recognize, adopt, and apply external knowledge. In this paper, R&D intensity was measured as firms' R&D expenditures as a percentage of sales revenues over the past year – not very helpful for us, but we might want to dive into how an organization or team deals with learning and knowledge transfer. Berchicci et al did find that remote collaboration is positively related with innovation performance, but at low R&D intensity, the relationship vanishes.

Bosch-Sijtsema et al describe five key factors that affect the performance and productivity of teams of knowledge workers collaborating in distributed work settings. Knowledge work (KW) is defined as: the creation, distribution, or application of knowledge by highly skilled and autonomous workers using tools and theoretical concepts to produce complex, intangible, and tangible results. These five key factors are:

- Team task
- Team structure
- Team-work processes
- Workplace and
- Organisational context

Each of the five has specific characteristics that can affect the work of dispersed teams. We could decide to use these 5 as a starting point and see what it reveals.

Cheshin et al describe how partially distributed teams function and operate in two different media environments, varying in availability of communication channels. These media environments may encourage different communication patterns, widening a gap produced by distance. They demonstrate that different electronic communication norms emerge among members of the same team based on their media environments. Those in remote teams wrote more and longer messages. Most of the norms regarding use of electronic communication persisted even when media environment was changed. This difference in ECNs might serve as an additional fault line, causing an additional rift within distributed teams. It might be of interest for us to ask about the emergence of norms in projects.

There is some inconsistency in the literature where attributions are concerned. Some authors argue that distributed teammates are significantly more likely than co-located teammates to make internal dispositional attributions rather than situational attributions concerning negative partner behaviour, whereas other find opposite effects. It might be worthwhile to explore this: do people find that they are quicker to judge the person or the situation when partnering remotely?

Fayard et al. examine how writing supports dialogue, and thus collaboration, among distant partners. They identify four mechanisms of writing:

- Objectifying
- Contextualizing
- Specifying and
- Reflecting

They show how each of these they support dialogue and help to address the dialogical challenges involved in distributed collaboration⁹. We could explore whether writing (through email) is helpful or not, and how – though perhaps this would be too detailed for what we want to do.

Gibson et al. unpack four characteristics often associated with the term ‘virtuality’. These are:

- Geographic dispersion
- Electronic dependence
- Structural dynamism (membership changing all the time) and
- National diversity

They argue that each hinders innovation through unique mechanisms, many of which can be overcome by creating a psychologically safe communication climate. We could explore these five concepts, the paper gives a very detailed¹⁰ methodology for doing so. Psychological safety is harder

⁹ For what these mechanisms entail, please refer to the original paper.

¹⁰ Probably too academic for this project

to measure but authors indicate that it deals with concepts such as 'empathy,' 'openness' and 'understanding'.

In the **Nurmi** paper, the focus is not on team performance but rather on the stress team members experience by working remotely and how they cope with that stress. Remote collaboration is demanding, as partners have to be flexible and put in extra effort to communicate. We could explore to what extent our respondents experience stress and how they cope with that.

Finally, **Pena et al** found that dominance perceptions were more extreme when group members did not share a geographic location (distributed groups) than when they did (co-located groups). It might be interesting to explore how people form perceptions in their remote groups.

It should be noted that the concepts that emerge from this literature search are largely about performance-related issues, and not so much about possible emotional elements to partnering, such as feeling isolated and not being listened to. Also, there were not obvious themes that are very specific to partnering, such as building alignment or exploring each other's values.

This is interesting in that so little has been written in the academic sector about remote partnering but in terms of giving us insights to enhance our action research it is of limited use.

Practice-oriented publications:

Additionally, we looked at 2 practice-oriented publications^{11 12} on partnerships in the humanitarian assistance sector provided by a project team member¹³. These studies are somewhat context-specific (one, for example, is set in Syria) but they are particularly focused on partnerships and the specific challenges of partnering long-distance. These publications provide us with a few important insights:

1. That the notion of 'equity' in a partnership is questionable when one side has all the money and holds most of the decision-making power. This is a common dynamic of partnerships between international and national actors, but becomes more nuanced in a remote setting because while the international players continue to hold all the money, the local players hold all of the access.
2. The nature of the context (in these cases, conflict scenarios) in which the partnership is operating is very personal to the local partner, and far less so for the international partner. The experience is therefore very different with the international partner finding it hard to comprehend the scale of the threat or risk for the local partner. This influences the relationship significantly. Trust and trust building becomes far more important.

¹¹ Missed opportunities: the case for strengthening national and local partnership-based humanitarian responses

¹² Breaking the Hourglass: Partnerships in Remote Management Settings—The Cases of Syria and Iraqi Kurdistan.

¹³ Catherine Russ (PBA)

In summary, the following issues seem to be particularly relevant to the Remote Partnering Project:

- Partnering remotely might enhance creativity and innovation but it poses real challenges with regards to communication
- Those involved need to be able to learn from each other and for that they need a safe environment in which to explore challenges
- Perceptions of each other might become more extreme when partnering remotely and this may impact a partnership significantly

There are also a number of specific topics that recur in the literature. These are:

- Learning environment
- Partnership's task(s)
- Partnership's structure
- Work processes
- Work place
- Context
- Communication norms
- Attributions for negative behaviour,
- On-line communication and its limitations
- Geographic dispersal
- Electronic dependence
- Partner turnover
- Cultural diversity
- Psychological safety
- Assumptions and perceptions
- Isolation and stress
- Coping strategies

These concepts could all be good topics for further exploration (including at the Design Workshop in January 2017 – see section 5). We will need to be selective, perhaps by focusing on topics that align with those that have emerged from our face-to-face interviews and on-line practitioner survey, the results from which are the focus of the next section.

3. Findings from action research

This section is derived from: the interviews conducted with partners and staff from the British Red Cross, PAX and the DEPP programme; the facilitated conversation and the survey of partnership brokers and a review of some published partnering case studies.¹⁴

How is 'remote partnering' understood?

Remote partnering is generally seen, by those we contacted, as a **necessary way of working** in the distributed work world of the 21st Century, particularly in the humanitarian sector where access is often denied to international partners – it has become a necessity and a norm of modern work.

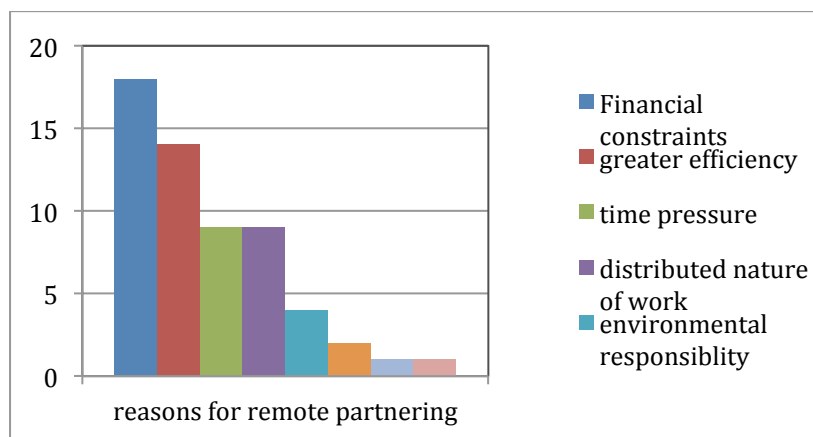
"My work is here, their work is there. Why would I go there to do my job? Why would they come here?"

Remote partnering is the nature of many peoples' day-to-day work. Often those we spoke with had not thought about it as anything noteworthy and did not have an expectation or vision of what remote partnering could be – it is just way they work. At times this made it hard to push people to articulate their frustrations, challenges or even achievements. They were not always able to step out and reflect well on it. Having said that, it is also the case that many (the majority) see remote partnering as a poor substitute for face-to-face interactions.

"Losing the face-to-face dimension can slow down the development of a relationship, but a remote relationship can make other dimensions more intense (e.g. listening, or having to write thoughts down by email) and therefore they can be more effective or powerful. It can help individuals from different backgrounds, different sizes of organisations, different levels of 'power' work on a level playing field (everyone has the same constraint or the same entry point)."

It seems that remote partnering is so taken for granted that there is virtually no guidance on how remote partnerships should be carried out so it often becomes a default position more akin to long-distance line management. Many of those interviewed called these relationships 'partnerships' but their descriptions of how they worked suggested a rather 'thin' partnering element (with some notable exceptions) – which we believe could be attributed to the challenges of remoteness.

Imperatives / drivers to partnering remotely¹⁵



¹⁴ More detailed summaries of each of these are available under 'outputs' on www.remotepartnering.org

¹⁵ From survey of 25 partnership brokers

A point made several times is the increasing expectation / demand of donors for projects undertaken in partnership / consortia / alliances across countries and sectors requires, by default, remote partnering. This is in line with the comment about about work today being driven by financial and time constraints and the need for efficiency.

In donor funded partnerships there is the added issue of due-diligence and the challenges of corruption (specifically the misappropriation of funds). In disaster and conflict areas, security and safety constraints add to the challenges.

Some key challenges

Remoteness amplifies existing biases and lack of equity in relationships

The dynamic in remote partnerships can quickly revert to control and compliance, particularly in situations where the funding partner is remote from delivery location. Current models have generally been reported as still more of that of donor / beneficiary rather than equitable partnerships. The relationships are by and large, led by indicators set by the lead partner, rather than relationships where the local partners co-create standards.

All the organisations encountered in our interviews suggest that there is a desire to move away from a pattern of remote management and into one of equal co-created partnerships. There are some supportive models showing where they recruit to a specific philosophy and where partners agree to stick by a stronger partnering model and learn through the modelling of the recruiter.

The practice of equity is problematic whether remote or in person. Whilst there are many good people trying to do good things, often against considerable odds, their organisations are still nascent in their ability to unleash the added value of partnering and that there is a long way to go to set an equitable baseline between partners. Remoteness is quite a factor in trying to bring about this change in power balance and good partnering practice.

An interesting point, however, is that the longer a partnership was working together the looser the controls and accountability mechanisms seemed to be.

The use of English as the predominant language automatically disadvantages some people and poses questions as to how to enable their equitable participation. It was acknowledged that the fact of having to partner remotely has made for a reality of 'English supremacy' and a marginalisation of other international, national or local languages - those not comfortable in English being at a default disadvantage. Operating on-line makes this even more problematic since those involved do not have the added advantage of visual inputs and more informal time together to counter the language challenges.

Fewer opportunities for building trust and cultural understanding

Specifically in remote partnerships, many have found it difficult to build trust and rapport. Trust is largely seen as particularly important and in distance working it is hard to 'get the measure' of each other and to know how to be and how to behave. Many were keen to explore how to build trust particularly if partners have never met face to face.

"There is a real difference between having met before and continuing the relationship long-distance and never having met."

There seemed to be wide agreement about the need to meet first (even regularly during the life of a partnership) as a pre-requisite to being able to partner effectively remotely:

"To achieve an open, unbiased and fair partnership between entities, which sometimes requires conceding to the other, takes on-going dialogue and the establishment of respectful working relationships. Doing this remotely can take more time and is more vulnerable to misunderstandings / getting at cross purposes"

Cultural differences are always cropping up as an issue, and communicating through email and phone calls can add another layer of complexity to that. For example, not being able to say 'no' is also a cultural factor, as it is generally seen as rude to say no, especially in Eastern Africa where people tend to say 'yes', but subsequently give a long story about how extremely difficult it had been; or saying 'yes' in a public meeting but 'no' in a private meeting later on. The team had to get very good at recognizing the difference – this is, of course, especially hard (perhaps impossible) long-distance.

Trust – or rather the lack of it – was mentioned repeatedly as a remote partnering issue.

"Remote operations are not normally easy for organisations that directly implement, because they don't trust, they take the money [from donors] and need to be accountable."

"Operating in remote areas raises issues with technology, lack of monitoring and donor compliance. But if you don't trust your partner, how does it work? You just let people die?"

"You need to build trust even if you can't go to the field..."

"Trust takes longer to build in remote interaction."

Time

The cry 'We don't have time' can be heard echoing across many a remote partnership and is acknowledged as a serious issue. People questioned what their colleagues and partners are actually prioritising when they are not allocating time to the partnering process. There was quite a lot of exasperation on this issue.

"We're all trying to squeeze in too much so we skim read messages and listen superficially before making quick decisions."

Lack of time and not fully anticipating the needs of a particular partnership, forced partners to learn from what went wrong rather than doing better from the start. Having no established protocols or approaches for undertaking a partnership remotely was found to cause serious relationship challenges over time.

Logistical barriers (including access to technology and time zone differences)

Technical and security issues are key issues when it comes to long-distance communication. This varies hugely from region to region. In some cases, phone lines and inter-net connections can work perfectly well, in others, they can be very unstable. And, of course, in some regions, all communication is monitored by repressive government. In those cases, people make sure they talk about superficial day-to-day matters when they are remote, and keep the more strategic matters for when they meet in person.

Challenges of technology

"Because chances are you might lose a connection in three minutes, people get straight down to business, and this might hamper creativity as well as relationship building. People indicate that informal communication is lacking in internet exchanges or phone calls."

People were seen by some to be far more disrespectful on line as they come to meetings ill-prepared and often do not actively contribute (probably working on other things during the conversation) leaving those with a greater sense of responsibility to carry disproportionately more. Some reported that the start times of meetings are not always respected and that this created a 'stop-start' approach to the flow of meetings. Generally this reduced people's enthusiasm for this form of communication.

Complexity of remote meeting facilitation

One issue is around the interface between managing the technology and facilitating a remote conversation. All partnering conversations have levels of complexity and take skilful management to be penetrating, inclusive and productive. All too often, the concerns about managing the technology are overwhelming and the facilitation element too easily becomes subordinate and superficial.

It was also found by the research team that people are not asking questions about how to work best remotely as they simply carry on with the traditional ways of working that have become default positions for many.

"Inclusiveness a major challenge - not forgetting remote participants, allowing space for introverts, understanding power dynamics"

"Keeping everyone engaged requires time and energy"

Preference for phone calls and teleconferences were reported as better ways to gauge how someone is coping as they're more willing to admit to challenges in conversation than by email. Spotting problems early on is much more possible with conversations rather than reports which can obscure more problematic realities, especially lengthy documents that don't get read from cover to cover to understand the reasons for and the layers within situations.

Lower quality dialogue

It seems there is a real reduction in the quality of dialogue in remote conversations and meetings. How probing is the conversation? How brave is it? How creative is it enabled to be? How likely are the conversations to bring real mutual understanding of deeper drivers and concerns? These are the elements that seem to get lost. Generally, remote conversations were felt to be more business focused – sometimes looking for a quick fix for a problem rather than 'de-layering' the issue and exploring options. It was acknowledged that it was also in face-to-face meetings to have conversations that are brave, curious, probing, difficult, exploratory and that conversations often lack imagination and creativity – but that this is increased significantly when working remotely.

People not following through

Because of the distance it is hard to understand why people do not follow through on what they agreed they would do. It could be a lack of capacity, but it could also have to do with cultural differences. This is inter-woven with the demands of a strong system in monitoring and verification.

"Often western based agencies have a pre conceived idea of aid diversion at local level; whereas at local level aid can only be delivered through other informal community delivery mechanisms. Communicating through long distance channels does not help."

"Sometimes you cannot authenticate what comes from the field. Face to face is more enhanced, you can observe directly."

Not being able to 'be there' for your partner and give them support

One key aspect of remote partnering that can be challenging is the fact that partners are not always present to support each other when something bad happens. In conflict areas, crises might occur where people are in serious jeopardy, and this was found to be a challenge for partners not being able to protect or properly support their local counterparts in times of difficulties.

Some notable achievements

Fostering a stronger sense of local ownership, independence and clearer separation of roles

Remote partnering was seen to have advantages for both Northern and Southern partners in terms of ownership – local partners can work on the ground, responding to ever changing ground realities and the Northern partners by working from a distance, can work on strategy without being 'swept up in the moment'.

Remoteness from the front line can enable a focus on the bigger picture and longer-term goals as their specific contribution to the partnership. This is different from exercising control, reporting, accountability and managing compliance. Distance can give perspective and avoid the whole programme of work getting too tied up in the day to day.

'When I am surrounded by partners, their analysis might become mine. I think it might be different if you work in operations. There, you might really need others close by. But my work is in strategy, and strategy requires distance, to develop you own analysis'.

One of the major advantages is that the distance between partners allows for local ownership to develop. Local partners have to come up with their own plan and not rely on their Northern partner for that.

Creative and systematically applied virtual meeting protocols

Those who reported more success in their remote partnering, also reported holding frequent scheduled meetings, allowing for meeting preparation, sharing meeting facilitation roles e.g. chairing/technology/minutes, engaging in participatory processes during calls, sharing of group call minutes as well as sharing of bilateral conversation minutes.

"Ensuring explicit understanding and programming of virtual meetings"

"Having skilled remote meeting operators separate to the chair of the meeting (separate computers)"

"Spending time as part of the collaboration agreement together creating a space that is different from the remote partnering transactional dynamics, which allow for trust, setting the grounds, setting the frame of the collaborative endeavour."

In general, people indicated that they made conscious decisions about what to talk about and through which medium. For example, anything related to strategy and conflict is usually handled face to face because it is seen as very important to pick up on non-verbal communications when talking about more sensitive or ambitious topics.

In this sense, it is not the technology availability per se, but the actual means of using the technology. The following have been strongly mentioned as 'success factors' associated to regular and planned communication:

- Decisions are recorded and shared, which means that there is institutional memory and there is a level of transparency and accountability
- Agility in the way of operating: without the need to be able to see all the tools or 'processes'. In this way there may be some creativity from informal thinking that derives from the acts of working remotely in partnership
- High and constant frequency of communication
- A regular communication protocol (such as 'labelled' emails)

Taking every opportunity to build relationships and cultural insights

When partners do not see each other very often, when they do, they make an effort to make the most out of it. Often, people reported staying at partners' houses, and their activities have a more social element and go beyond sitting in meetings together. This allows for the relationship to develop further and deeper than would be the case if they were in the same location.

"Relationships and mutual trust are key. Without those, you are not a partner, but a contractor. Especially when working remotely, you need to invest in the relationship."

"Understanding socio-cultural sensitivities and core values of each and every partner are requisites for the broker to imbibe even before he starts partnership facilitation.."

"It may be a good idea for partners to co-jointly agree on what is their vision for remote partnering and set the ground rules etc..principles of partnership (and values) will probably mean a lot and somehow partners need to be clear on various fields of operation - what is transaction, what is innovation, what is capacity building, what is learning etc and how all of that may contribute to a wider change"

"What helped them to remote partner was learning about each other."

Mixed communication types

"Being careful to blend different methods for communications and exchange on a regular basis (formal and informal, bilateral, in groups, email, phone, Skype chat etc). A 'multi-layered' approach can help enrich a relationship that doesn't have the face-to-face dimension"

Multiple conversations and connections fostered with multiple staff from each of the partner organisations keep the focus dynamic so that if someone leaves the partnership it doesn't all fall apart:

"Social media can be very helpful – Facebook, for example, has a double function: it allows you to stay informed on whatever is going on in the region, and then when something happens, you can respond and communicate with your partners in the region very quickly. It shows them you care and it affirms your shared concern for the conflict area."

Most mentioned using communications to promote transparency as being of the utmost importance:

"We need partners to trust us to be able to do our job, and for them to trust us we need to be open about what we do 100% of the time. It's OK for partners to not agree with what we do, as long as they know what we are doing and they trust our integrity".

What if... (ideas from those we contacted about what could make a difference)

➤ **PLAN FOR REMOTE PARTNERING AS AN EXPLICIT MODALITY THAT NEEDS RESOURCING**

Distinguish between types of meetings - project focus or partnership focus / exploring or decision making / sharing experiences or planning etc was deemed necessary in establishing a modality with methodologies that support remote working:

➤ **ANIMATION OF MEETING PROCESSES BY PARTNERSHIP BROKER / PROCESS FACILITATOR**

Find ways of creating equity and 'putting away our egos' as one person put it and finding ways of doing things to move towards more co-created ways of working. Some partnerships are dealing with nine or more different partners and therefore a well-brokered approach could really support better processes.

"More use of innovative meeting management approaches that seek to reduce or minimise power differentials and build trust and equity"

"Partnership Brokers may need to set the tone for working long distance in ways that are disciplined / well prepared / productive and fit for purpose and to encourage those involved to understand the need for commitment and investment in long distance active engagement."

"Partnership Brokers may need to become more accomplished at webinar / long distance meeting management - a new and distinct skill."

➤ **CLEARER DISTRIBUTION OF ROLES AND RESPONSIBILITIES**

Considering more thoughtful and distributed approaches to allocation of roles – intentionally trying to build more 'level' (equitable) relationships between partners by discussing who will do what.

"Could work well with a clear devolution / allocation of roles and expecting a level of self sufficiency and autonomy that is then reported back to the group - a more horizontal way of working."

"Build on the personal / professional strengths of each person (not just their organisational role and immediate tasks) by exploring how can they each contribute holistically to the whole partnership from their talents and preferences?"

"Work early on to define and agree the common purpose and to explore and align around priorities, accountabilities and how to address grievances if things are not working well."

➤ **FACTOR IN SOME FACE TO FACE TIME¹⁶**

"Invest in face to face time at the start or near the start"

➤ **USE MORE INSPIRING TECHNOLOGY**

The current technology was not deemed to be overly inspiring for creative working and limited the type and length of contact they could have. The limitations of skype were mentioned repeatedly and some were already exploring creative alternatives and promoting the use of visuals, pie charts, graphics, cartoons, imagery and / or metaphors to make communication more precise and / or vivid.

➤ **FOCUS MORE ON INFORMAL COMMUNICATIONS**

"Finding more imaginative / innovative / intelligent ways of communicating and keeping each other informed / engaged"

"Working on the human connection as the single most important feature (and not reducing the meetings to management issues)"

"Allow for emotional responses and find out how people are feeling – it is about them not just the project."

➤ **BETTER STRUCTURED, PLANNED, FOCUSED AND REGULAR MEETINGS**

Suggestions were made for meetings to be highly focussed and disciplined in the purpose and management of online meetings and for them to be very precise about who will do what and how this will be followed up:

"Structured and planned regular meetings, rather than fire-fighting with at least annual, preferably biannual face to face at some level"

"Keep the momentum moving, don't allow time lapses"

"Develop a culture of sharing note taking and record-keeping and having a more dynamic secretariat function"

➤ **INVESTMENT IN REMOTE PARTNERING SKILLS DEVELOPMENT**

Capacity building of partners in specific remote partnering and partnership brokering competencies was widely cited as a need in all the partnerships discussed.

➤ **CREATE A RESOURCE POOL FOR REMOTE PARTNERSHIPS**

Some of the remote partnerships happen in parallel with other remote partnerships. Some ideas emerged around the pooling of resources in the distant areas concerned by the remote partnership:

¹⁶ This was the most often cited thing that would make a difference

"We should have a pool of experts who are available at short notice. They should be able to work in three areas: learning and capacity building; knowledge management; innovations in partnering practice."

"Where multiple agencies are present in specific hard to reach locations, it would be good to pool resources in terms for example for spot checks and project verifications by local staff."

➤ **DEVELOP PEER-TO-PEER COMMUNITIES OF PRACTICE**

It was suggested that peer-to-peer communities of practice may open up new / unexplored / unexpected opportunities by doing things differently. By relocating the focus / locus of the work – it could be more possible to build locally grown / locally owned partnership

➤ **ENSURE LEARNING FROM REMOTE PARTNERING IS CAPTURED**

"We are moving from granting to co-implementing; and we have to ensure cross learning, learning from each other."

"Build some metrics for how to assess the application/ embedding of the five partnering principles in remote partnering."

"Consider how some of the material on 'relational analytics' could be used in this context."

"Learn from other sectors who may do remote partnering better (eg multinational corporations)."

Further ideas worth testing (from the research team) based on this research

1. Learn about innovation in other remote working situations (eg remote teams) and see what can be applied to remote partnering
2. Create new approaches to trust building in long-distance relationships
3. Assess what specific skills are needed to support effective remote partnering – especially those that promote quality dialogue and challenge power imbalances
4. Develop ideas on how to mitigate the disadvantage people without strong English feel
5. Use more sensory, visual and mindful approaches to help deepen appreciation of different cultures and values
6. Introduce a socialising element into long-distance relationships by exploring those things that are important to each partner
7. Develop people's confidence in challenging strong voices and being 'creatively disruptive' to enable real breakthrough behaviours and outcomes

- Acknowledge the differences in work preferences of each partner – for example, giving both introverts and extroverts the space and environment they need to function optimally

"Spending time as part of the collaboration agreement, together creating a space that is different from the remote partnering transactional dynamics, which allow for trust, setting the grounds, setting the frame of the collaborative endeavour."

4. Reflections from the Team

We pushed ourselves (and each other) quite hard in this research phase of the Remote Partnering Programme. As one of us noted at an early stage in our 'team log':



Not sure in our very wide-ranging conversation yesterday we made as much as we could / should have done in terms of interrogating our different responses to the questions Anne Marike asked us to consider. My concern is that we risk generating lots of very interesting materials and then don't find ways of making as much of them as we should / could / need to.¹⁷

Of course, each of the team members brought to this project their individual experiences, approaches, hopes and fears and we decided it would be useful (and, hopefully, interesting) to share these with readers of this report.



Catherine Russ:

Associate, Partnership Brokers Association

I was drawn to this issue from many years of professional experience of remote partnering and a strong sense that we could all get much better at it. The rushed nature of interactions with partners in the field always left me feeling we weren't capitalising on what these partnerships could really achieve. I also had the feeling that those we called 'partners' in other corners of the world did not always feel respected, valued or listened to in ways that made them feel a vital part of the equation.

A few years ago I came across a publication by Tufts University on the issue of remote partnerships on the Syria/Turkey. Their findings so closely reflected what I already felt that it motivated me to start doing something about it. I contacted Tufts and we formed an initial group with the IFRC and the IRC to look at this issue further. For a range of reasons, that project did not progress as I had hoped, but my interest remained – hence my enthusiasm for this project!

¹⁷ Extract from Team Log

The key issue that seemed important was how to creatively address the challenges of forming partnerships, maintaining them and getting them to deliver great things when operating long-distance as it seemed that 'lack of time' meant that none of those involved invested the necessary creative energy to make such partnership work more effectively.

The issue of trust is a second one – often cited by those we interviewed for this project – and it is for this reason that many partners feel the need to meet face-to-face wherever possible to accelerate trust building.

A third key issue is the willingness to let go of old constructs and mind-sets in order to be genuinely open to new ways of approaching and working with partners who are far away. This will also require donors to loosen the reins on their expectations of a quick return from partnerships and allow for more experimental space.

My dream is that we come up with some compelling new approaches and that these start to change (however slowly) how people view and plan remote partnerships, ushering in a new phase of development for partnerships working across distances. I would particularly love to see the building of relationships prioritised so that this is not the first thing to go when time is scarce.

When partnerships are addressed more wholeheartedly and holistically they will yield better results, and those involved will come to see investment in relationship building as time saving. I hope that the attributions of remote partnership currently being described as 'difficult' and 'challenging' transform into a sense of new and exciting opportunities.

I'm most concerned that those currently struggling with remote partnerships, whilst finding the ideas and possibilities that emerge from this project interesting, will not actually try them out in their own partnerships. I fear the lure of 'business as usual' and that the kind of resistance that people often have to new things will hold sway and new approaches will be easily dismissed.

I hope we can help to build a bridge to new ways of working in order to better facilitate / broker the adoption of new approaches.



Ros Tennyson

Director: Strategy & Services, Partnership Brokers Association

Looking back over the months before we got together to set up this project, I remember three separate-but-related 'ah ha' thoughts about remote partnering that made me realise that this was a topic I felt compelled to explore in more detail.

The first was when I was musing on the impact of whether one is an extrovert or an introvert on the ways in which we partner and how, on the whole, extroverts enjoy functioning in groups and in the public domain because they find such situations stimulating. I was feeling a bit sorry for introverts knowing (from personal experience!) that I function much better away from groups when I have time alone to reflect. And suddenly the idea popped into my head that introverts might really flourish in the partnering space if they worked long-distance – liberated from all those noisy extroverts!

The next thought was when I found myself musing on why a project I have been involved with for 20+ years works so well (and another I have been involved with for 1 year worked so badly). The latter has five partners, the former has three partners but I don't think it is the numbers that make the difference. The 3 partners in the 20-year project works because we simply get on with our clearly defined roles (that we have allocated to each other because we have very distinctly different competencies and personalities) and completely respect each other to do the best possible job we can. In other words, we choose to work 'remotely' and to give each other a great deal of autonomy. And it works because we have the 'licence' to take initiative without endless meetings. And it is still a 'partnership' because we are ultimately entirely accountable to each other.

The third thought is linked to my constant quest for re-igniting the human capacity for imagination in partnering. It is my belief that our education and prevailing social expectations tend to programme us into taking conventional routes and to make us cautious about being 'different' or 'disruptive' even when these may be the only ways to bring about the transformation that the world rather urgently needs. How wonderful, my meandering and inherently disruptive brain thought, to be free to really try the unknown, to be truly innovative and creative... perhaps working remotely may be just what we need to liberate development partnerships from their conventional straight jackets.

I hope this project is truly liberating for those who really want to make a difference but I fear that too many of those who could make a difference lose heart because those around them keep insisting that the obstacles to effective remote partnering are insurmountable.



Anne Marike Lokhorst

Training & Communications Coordinator, Partnerships Resource Centre

I'm motivated to work on the nexus where science meets practice and this is one of those places. At the Partnerships Resource Centre, we tend to approach partnering and related concepts from a relatively academic point of view. I am keen to learn more from the people who are actually doing the work and the challenges and opportunities they encounter.

Given my background in psychology and communication science, I was mostly thinking about how remote communication shapes the shared identity of the partnership. Superficially, you might expect that when people partner remotely, they communicate less frequently, and thus develop less of a sense of shared identity. While we did see that people indicated that they engaged in less social talk during remote conversations – as compared to face-to-face meetings – there was no indication that people identified any less with the partnership. This seems encouraging.

One of the things I learned from the interviews I conducted, however, is that there are clear advantages to working remotely – for partners in both locations. Being remote allows for local ownership to occur. At the same time, for the Northern partner (for lack of a better term), not being in the conflict area allows them to 'keep a cool head' and focus on strategy more than day-to-day operations.

Following up on that key finding, I hope we can come up with a variety of very practical ways to help build remote partnerships. If we are able to understand the advantages of partnering remotely, we might be able to advise on designing remote partnerships so that they capture the advantages of both being in the same location and being apart. We could also help articulate those issues are better dealt with face-to-face and those undertaken best remotely. Knowing which issue goes where can be very helpful to people working in the field. I'd be very content if our work could contribute to that.

My only real concern at this time is that partnering is very context-specific, and that might make it hard to come up with general recommendations for improvement. I think we will need to come up with a way to make such recommendations tangible but also adaptable to fit different contexts. This might mean that we frame our advice in the form of questions.



Joanna Pyres

Associate, Partnership Brokers Association

I have an excellent quality of life where I live in rural India whilst being inspired by my international work in sustainable development. Most of my long-term working relationships are conducted remotely with only occasional face-to-face interactions so I live daily both in the "northern workplace" and a "developing world community". My work as a partnership specialist and researcher – particularly with two projects one on the Turkey/Syria border and the other in rural Myanmar – has brought into focus some of the absurdities in the development system that occur when diverse actors are distributed in their working arrangements.

At the same time, I have been exploring and experiencing different ways of holding conversations to promote equity and fuller participation both face-to-face and remotely and have begun to use techniques that seem to clearly change the quality of my interactions with others. I am really curious to learn more about the nature of existing remote partnering and how we can better integrate values such as equity, transparency, fairness, diversity and sovereignty into our ways of working together.

I started off eager to learn what are proving to be the most effective and efficient remote partnering practices and how humanity and human-ness can shine through technology. Since starting this research I have started to wonder how technology and remote partnering can support a deeper humanity.

I hope that during this project we will be able to discern partnering processes that will work best to support remote working as well as to better understand what limitations working remotely poses. I

also hope that during our next phase of workshops we find and inspire ways of working that fundamentally shift the status quo and liberate the creative potential that is often stuck behind clunky, formulaic, ineffective and paternalistic development work practices that we accept as the norm. That we can shake up and wake up the development community so that we can effectively mobilise the resources and talents that we need at the scale and speed that we need in order to rise to the challenges that current global events present us.

I fear that "business as usual" is so entrenched that we will not rise to the challenge and we will be known as the generation that failed to learn how to adapt to a changing world. I fear that there may be political forces at play that genuinely do not want a more equitable world and that the development system and notably the donor community will turn a blind eye to the changes that could be made to level the playing field. I fear that everyone will be so busy rearranging chairs on the titanic that they fail to see the iceberg.

So those were our drivers and give a flavour of our passions and priorities as well as our anxieties about whether or not we can really have impact with this project in an intransigent world.

We have also decided to share some of the issues that came up in our first conversation after we had each completed our piece of the research puzzle.

"We don't have time" is the cry from everyone! What are they prioritising? What will it take to make partnering itself a priority?

There are some good people trying to do some good things, but generally falling short of unleashing the potential added value from partnering.

An equitable baseline seems quite a long way away

It seems that, for many, remote partnering quickly morphs into line-management and control rather than engagement and co-creation.

It was extraordinary that the 5 case studies reviewed – compiled by a team of MEL experts – hardly touched on the impacts of partnering remotely. In spite of its centrality in so many partnerships, it does seem as if people are not (yet) giving remote partnering the attention it needs.

What about remote partnering as a potential 'leveller'? Only one person referred to that as a tangible benefit of working remotely.

I was very surprised at how very focussed virtually all those we contacted were on the communication element of remote partnering. What about re-thinking partnering processes, governance, accountability, roles and responsibilities? Or, even more important, seeing remote partnering as a way of building new forms of leadership?

It seems as if those operating as partnership brokers (those who responded to the on-line survey or participated in the facilitated conversation) tended to look more than others at process in their responses. Maybe the limitations of remote partnering experienced by so many practitioners may lead to a new interest in 'brokering'. Does remote partnering really require / rely on good 'brokering' more than face to face?

Technologies / tools (as listed from the survey) show a great many communication options. The question then becomes: are these tools for remote partnering or simply for remote working (that then becomes a substitute for remote partnering)?

Perhaps it is the quality of dialogue that is really problematic (not the technology per se). How probing is the conversation? How brave? Creative? These seem to be the things that get lost. Things become more 'business' focused – tendency to go for 'quick fix', less layering, less caring.

In summary of the team's learning from the research phase as explored in a post research conversation are:

- Remoteness **amplifies existing biases**
- The use of **English as the predominant language** was rarely mentioned but may be just as problematic / divisive as other key issues.
- **Quality of dialogue** is just as (possibly more) important as efficiency of communication tool
- **Trust is seen as critically important** – how to get the 'measure' of each other and build / sustain trusting relationships without meeting face to face?
- Getting people **face-to-face whenever possible** is seen by almost everyone as pretty central to remote partnering working well
- An issue that seemed to be important – but largely unspoken – is about how to deepen insight, sensitivity and **understanding or each other's culture / sector / values / pressures?**
- People tend to see remote partnering as a **problem to be solved rather than an opportunity to be explored** – why is this and can this project make a difference?

It is, of course, also worth noting that this entire phase has been conducted remotely and that some of the team have never met face-to-face.

5. Getting better

So what have we learnt so far?

From our collected research and many conversations with people partnering remotely, there is a sense that a new way of working remotely is needed and would be largely welcome – especially, we suspect, if it can be seen, ultimately, as saving rather than spending time. Many respondents spoke about the challenges of time, remote locations and technology limitations as key obstacles to partnering effectively long-distance, several also spoke about the potential for new approaches to break through to more rewarding ways of partnering.

From the feedback it's clear that solutions are likely to be layered and multiple rather than a simple 'quick fix'. In fact, the challenges of different contexts, cultures and types of partnership suggest that a highly flexible set of options that are capable of being adopted and adapted as needed would be the way forward. It might, in due course, lead to a more emergent and less prescriptive approach to face-to-face partnering. Lessons from effective remote partnering could help to pioneer new approaches to partnering as a paradigm.

So where does this take us?

We have picked up from our work to date that an important pre-condition to making changes is the need to support partners (at both individual and their organisational levels) to address their preconceptions and limiting mind-sets. Without this, it is unlikely that innovative and emergent ideas will be taken up. Inspired by the Theory U approach (see Fig. 1), we believe that giving birth to new ideas or innovate solutions, will require a process of **letting go**, followed by the holding of **open space** for the unknown unknowns and new initiatives to come through.¹⁸

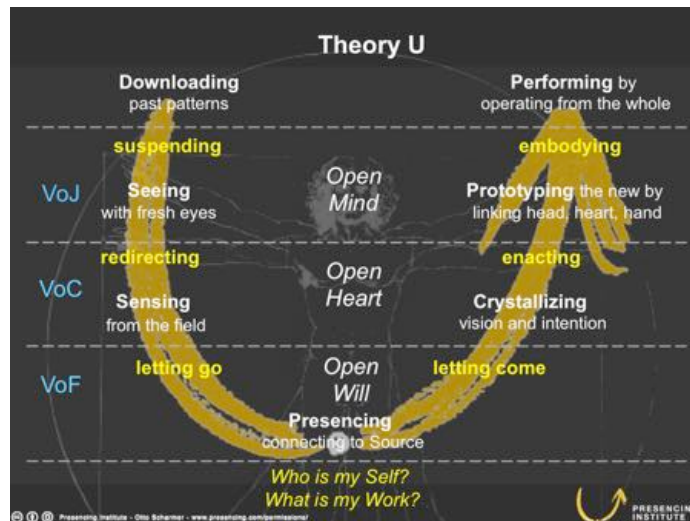


Fig. 1

¹⁸ Of course this raises the question of who would take the lead in facilitating this way of working in a systematic manner? And could this be a distinct and useful role of partnership brokers? And could / should partnership brokers or those in the partnering process management role be offered training in remote partnering facilitation? But these are questions for the future!

Phase 2: The proposed approach

The collective findings from the research to date provide a rich starting point for reflection and for the creation of creative space to explore new possibilities for innovation and breakthrough in remote partnering. The idea is to flip the difficulties, challenges and obstacles that are so often perceived as inevitable in remote partnering scenarios and encourage those involved to start viewing them as opportunities, possibilities and new leadership.



Partnering remotely means partners are often also remote from the results of what they have co-created. Each person remains in his / her own partnering story not sense-making the shared story which is where the learning potential is. I wonder how remote partnering can both facilitate the shared story + capture learning from the partnering journey?¹⁹

A 3-day **design lab** is planned for January 2017 where the project partners, together with their nominated field partners, will come together for a time of creative exploration. We, the current research team, will act as facilitators of the lab (with one of us, participating remotely to ensure that what we do really meets the needs of remote engagement).

A number of specialists have been invited and tasked with helping to provide an exciting and multi-disciplinary melting pot where new ideas can be birthed, crystallised and proto-typed. Specific sessions will focus on:

- **Story-telling, mindfulness and serious games** as a way of breaking through assumptions and conventional thinking
- **Igniting the senses** to build more capabilities in terms of careful listening and deeper insights as well as exploring the use of images and metaphors as vehicles for self-expression and communication tools
- **On-line learning** approaches that can enhance distance-working in unexpected and powerful ways

A multi-sensory approach (imagining the possible) will be integrated with an analytical view (understanding what has been) in order to dream what could be better whilst our feet are firmly grounded in the day-to-day realities of partnering on the front line.

The design lab ideas and practical proposals will form the basis of three **creativity workshops** in different regions during February and March (locations in three continents being determined at the time of writing). These will offer opportunities for interrogating what is being proposed and for the evolution of some completely new ideas.

What do we hope will be achieved?

It is expected that these ideas – even in their embryonic and somewhat un-tested state – will be made widely available through the partners' own websites and networks, the newly created Remote Partnering Project website and, most importantly through the Humanitarian Leadership Academy's

¹⁹ Extract from Team Log

learning platform Kaya. Ideas that need further investment will be incorporated into new phases or funding bids in order to allow their full development.



I REALLY think there could be great value in one output from this work being the development of a remote partnering App that people can have on their mobile phones and computers that can support them with some useful prompts for effective remote partnering. Like a 'digital partnership broker'... I am getting quite excited about all this!²⁰

How will we involve a wider practitioner community?

Further to sharing our ideas (as indicated above), we will be casting our net out by openly inviting anyone working remotely to share their stories, challenges and insights to gain a wider perspective and deepen our understanding of the remote partnering landscape. This will be managed on a dedicated section of the Remote Partnering Project website (www.remotepartnering.org).

We will position this work as strongly as we can in the hope that, in phase 3, we can launch some solid proposals for going to scale and having far-reaching impact. A launch is tentatively planned for April / May 2017.

All our efforts are focussed on enabling the partnership community worldwide to radically re-think and re-imagine how remote partnering could be an exciting partnering approach in its own right. By establishing remote partnering as a legitimate method for engaging partners and not a fall-back position to face to face, we hope to unleash enthusiasm and motivation to discover its added value and to reach those parts of the globe where this type of intervention is needed most.

²⁰ Extract from Team Log

Remote Partnering Project: Founding Partners and Funders.

The Remote Partnering Project has five founding partners that work together to shape the programme and that have contributed the core resources (financially and in kind) to enable the project to happen. The founding partners are:



Working with



A grant has been awarded for the programme of Design & Creativity workshops that are scheduled for the next phase of the project (January to March 2017) from:

