Using a Value Based Leadership Framework to Enhance Partnership Brokering

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Level 2 accreditation:
Final Paper

Introduction

"Focus on the journey, not the destination"[1]

(Anderson), might be a suitable context to summarise becoming an Accredited Partnership Broker through the Partnership Brokering Accreditation Scheme (PBAS) program. Becoming an accredited partnership broker is a milestone in a longer journey, a journey that can, and should, involve a focus on continual reflection, improvement and lifelong learning. It is a journey that can provide immense challenges, joy and success.

This paper provides a snapshot of such a journey. It highlights the context and earlier stages of the journey – a professional background and how partnership entered, as well as the roadmap and challenges that PBAS has been able to expose and allow to be explored. The discussion will reflect on key challenges that were considered during the PBAS Level 1 workshop, and were refined and focused during the period of Level 2 reflective practice. This will be done by exploring guiding questions:

- How can reflective practice improve Partnership Brokering capabilities, in my context?
- How can the learnings improve Microsoft's capacity to execute effective cross-sector partnerships?

Throughout this reflective journey, practical examples and vignettes will be used to enhance the travel. Finally, a summary and conclusions of status and the journey continued will be provided.

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1   Greg Anderson: Thinkexists.com.

The beginning - where the journey starts:

My career spans both the public and private sectors in about equal amounts – 15yrs/15yrs. Before ever considering the art and sciences embedded in PBAS, and starting the journey as an educator, education consultant and then academic, one key focus that emerged was a focus on building bridges across sectors. Earlier in my career I focused on win/win scenarios, working with the private sector to put more technology in schools, and spend their marketing budgets on teacher training instead of on colourful, but less useful, brochures. This stage in my career was the first inkling of values that existed around shared wins, collaboration and working as a cross-sector team to achieve common goals. At this time there may have been some over-focus on values around winning and being in control that provided less optimal personal and professional strategies and results.

This challenge, or career tension, around these values has been more than exposed through nearly nine years of working at Microsoft. Initially my role at Microsoft was in the area of Corporate Social Responsibility (CSR) or Citizenship, leading the delivery of education grants and programs, first for the US, and then later globally. During a three year period and under my leadership, Microsoft established over one hundred cross-sector partnerships in a similar number of countries, providing exposure to education partnerships of a range of forms, qualities and results. It was in 2005, when my role changed to be a Public Sector Director in Australia – a job running core business elements of sales and relationships, where the tension was peaked, and the decision made to formally learn more.

In 2006 I enrolled in the Post Graduate Certificate in Cross-Sector Partnerships (PCCP) at the University of Cambridge, a yearlong study of the science of partnerships. PCCP filled many gaps, and forced valuable reading, thinking and reflection. The most valuable experience through PCCP was a group project to write a partnership case study, where the vaguely hidden agenda was to learn how to be an effective partner. This truly reinforced the challenges and highlights of working towards common goals with people from multiple sectors and backgrounds.

It was the PCCP study that opened the door to a career change and move to Europe – to run education strategic partnerships for Microsoft, first in Europe and then globally. From experience and study, it was a concern for the sustainability of this work, that if partnerships did not play a more integral role in our business, they would be limited to Citizenship, an area too peripheral, making it easy to diminish the practice. Through this move, the consequences, challenges and required learnings have become more central to the professional role I hold, as well as to the core operation of Microsoft Education.[2]

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2   Serafin, 2010: MICROSOFT'S PARTNERSHIP CENTRIC CULTURE - lessons from a decade of using cross-sector partnerships to promote universal access to digital learning.

The PBAS Bend in the Road:

PBAS is "designed to provide very real and practical brokering skills in all phases of the partnering process".[3] After three years of applying the learnings from PCCP, and in the middle of a partnership integration process, it was time to look for a more formal model of developing both the individual, and the team at Microsoft, so as to improve the overall sustainability and effectiveness of the corporation's partnership work in education. Education has been the major focus of Citizenship work at Microsoft since 2003, and is also a highly strategic part of our business.[4]

Attending the September 2009 PBAS Level 1 workshop, participants were asked to reflect on their partnering experience and the challenges they faced and wanted to address through the study. The diagram below is the slide I presented:

These challenges underpin my role of the Internal Broker –

> "Managers from within a partner organisation who: prepare their organisation for collaboration in a multi-stakeholder partnership; Negotiate and represent their organisation's involvement in a partnership; and Play a key role in initiating / managing / developing a partnership arrangement."[5]

In Microsoft's focus on integrating Multi-Stakeholder and Public-Private partnership as a core business practice we currently face challenges around Shared Vision, Internal Partnership Capacity and Business Alignment. These elements form the major focus of the journey being recording in this paper.

While the PBAS experience provided the opportunity to hone existing skills and thinking, and to extend through reflective practice, there was one key breakthrough during this time which provided all later work with a new and powerful frame of reference, which not only had the potential to improve the quality of the partnerships I have been working in, but to also significantly improve the approach I was using to broker effective partnerships. The fork in the road required a revisit to **Values-Based-Leadership** and the uncovering of an approach to **Conscious Business.**

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3   Cohort 22 Information, Partnership Brokers Association.
4   Gates, 2010: Message from the Chairman. Education Alliance Agreement.
5   Ros Tennyson - The Brokering Guidebook, 2005

"Values are the essence of who we are as human beings… Our values influence every decision we make, even to the point of how we choose to make our decisions." [6]

Values-Based-Leadership takes a multi-dimensional perspective to leadership. The aim is to create a culture that enables people to make their best contribution (Despain et al., 2003). Further, Despain describes values-based-leadership as more democratic leadership, while O'Toole (1995) describes values-based-leadership as more effective than any other, notably "tough" or "amoral" leadership. For O'Toole, democratic leadership "is about the value of inclusion. There is nothing chaotic or ineffective about leadership based on that moral principle." (p13-14). Leaders using this style listen to others, encourage dissenting opinions, grant ample authority to their subordinates and lead by example.

Campiani (2006) further defines this style of leadership as one that combines focus on the Self, the Relationships, and the Task. Further, O'Toole (1995) describes values-based-leadership as being about creating conditions under which all followers can perform independently and effectively toward a single objective.

Consistently reflected through the experiences of the last 6 months and because of the nature of Microsoft being a highly matrixed organisation, the only way to be effective is through influence, not through authority. Acting in the role of internal broker, core values such as win/win, inclusion, collaboration and integrity play key roles in how the effective broker must operate. When socialising and building support for the internal PBAS program Microsoft will run this May, or when building support for a Partnership model of doing core business, values-based-leadership is the only way to be effective. The key learning from PBAS is that internal or external work does not differ in the importance of applying a values-based-leadership model of leadership and influence, and values-based-leadership is essential to apply to the Partnership Broker role if it is to be optimized.

"To be conscious is to be aware, cognizant and mindful… to live consciously means to be open to perceiving the world around and within us, to understand our circumstances, and to decide how to respond to them in ways that honour our needs, values and goals." [7]

"Conscious Business is a term used to describe a business enterprise that seeks to be aware of the effects of its actions, and to consciously affect human beings and the environment in a beneficial way."

It "refers to a movement towards "Values-based" economic value… As well as being a category of business, it can also mean an individual and personal approach to business." [8]

"Greatness is not a function of circumstance… greatness is a matter of conscious choice." [9]

Developing the competencies – Skills, Knowledge and Attitudes – for such greatness is what Kofman (2006) describes as **Conscious Business**.

A conscious business approach provides an important filter on business actions and behaviours, that mean that it isn't business as usual, and that the way each individual behaves has very measurable impact on the way the team or organisation operates and in turn has significant influence on what the organisation achieves. Consciously integrating an approach to partnership within the core way of doing business is not only the right thing to do, based on my values and the values of Microsoft [10], it offers a more efficient and effective way of doing business. At the core of Kofman's (p. 10-11) approach to conscious business are

"the three dimensions: the impersonal, task or "IT"; the interpersonal, relationship or "WE"; and the personal, self or "I". "

Making these two frameworks visible through reflective practice of PBAS Level 2 and reflections on the learnings of PBAS Level 1 have allowed me to significantly improve brokering practice through my current journey.

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6   Bob Rue - PM Magazine: Values Based Leadership, Determining our Personal Values, 2001
7   Fred Kofman - Conscious Business, 2006.
8   Conscious Business - Wikipedia, 2010.
9   Jim Collins - Good to Great: Why Some Companies Make the Leap and Others Don't, 2001.
10 About Microsoft, 2012.

Reflection on Learning:

Throughout the six months of the PBAS program, including preparation, undertaking the Level 1 workshop and the Level 2 reflective practice period, the most significant moment for me came during January after participating in a values-based-leadership workshop undertaken for my Education team at Microsoft. The workshop was a repeat of a similar workshop I had undertaken in 2006, built on the notions of Fred Kofman in Conscious Business (2006). The key principles are to be an effective leader you need to have a strong self or "I", which allows you to create strong interdependent relationships, or "WE", which then provides the opportunity to deliver the most effective physical results, or "IT". This model highlights how we can upgrade how the leader (broker) shows up, or "BE", demonstrating integrity and inner peace to facilitate the most effective teaming and most impactful physical results. It can be represented in the diagram below.
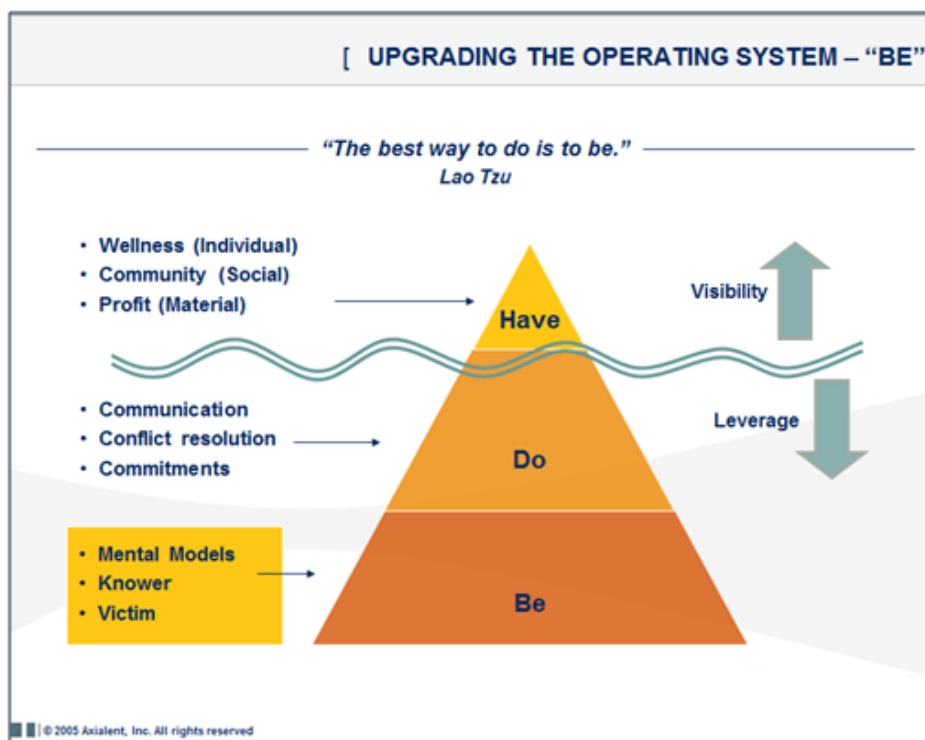
In discussions with my tutor and reflection of my journey it became clear what a useful model this is for partnership practice and brokering development. In reflection, I went into the Level 1 workshop with notions of successful brokering and experience, which was rocked during the first role play where I now realise I demonstrated "Ontological Arrogance."[11] I was paired with a petite woman from Cambodia to be the brokers and my arrogance allowed me to believe she was too quiet to be an effective broker so I pushed ahead and attempted to lead. Without going into too much detail, the role play quickly spun out of control and was really only saved when my partner stepped in with her integrity, quiet tones and inner peace to bring things back on track. I remember thinking that I had made a great mistake but didn't have a model to unpack that experience; I had used the Partnership Principles, and believed that was correct. The key learning was that it is not just applying the principles, but how you apply the principles that is important.

The real art and science of the broker gets exposed when the journey takes you out of calm water, and it is in the challenging moments, which always happen, that the broker needs to have a strong "self" underpinned by tools and approaches that values-based-leadership and conscious business provide. Through deep discussions with my tutor this was exposed, explored and developed.

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11 Fred Kofman - Conscious Business, 2006.

Further reflections down the road from Level 1 and Level 2 have allowed me to consider what a powerful model the values-based-leadership is when applied to partnering. Through PCCP and partnering experience, I feel comfortable with the "toolbox" of resources I have acquired and developed. Beyond this, the PBAS reflective practice has forced me to think and reflect more at the behavioural level, or the "I" level of the partnership broker's role and how these frameworks can be used to apply more effective behaviours. The table below[12] provides a summary of this thinking:

Desired State	Partnership Principle	Values-Based-Leadership Focus	Behaviours/Skills
High levels of mutual trust	Transparency	Self or I	Reflection, Insight, Feelings, EQ, Open Communications, Precise Speaking
Respect and appreciation of the partnership and its members	Equity	Relationships or WE	Facilitation, Collaboration, People Skills, Active Listening
Sustainable partnership outputs	Mutual Benefit	Tasks or IT	Win/Win, Imagination, Vision, Knowledge, Analysis, Understanding, administrative skills, professional detachment

Summary and Conclusions:

Partnership at its core is about people working together to achieve personal and collective goals and benefits, that cannot be achieved any other way. Part of the success and effectiveness of a partnership is the tangible outputs of the partnership; e.g. the professional development of teachers or development of improved curriculum materials. These are important for the sustainability of partnerships, but are likely to be the least complex for the broker to achieve results. However without focusing on the strong relationships, mutual respect, equity, and others highlighted above, the partnership will not be as effective or sustainable over time. So it is vital that the partnership broker has the competencies to foster strong interdependent relationships, and the complex set of skills (High EQ, reflective practice, high-level communication, collaboration to name some) to reflect and successfully navigate through a partnering journey.

For my journey, values-based-leadership provides a way of working towards more effective partnership practice, and in doing so providing an effectiveness framework. It is my belief that to be effective, it is vital that the broker be on a continual journey to strengthen their own integrity and demonstrate inner peace, to be values centric in their behaviours, and while striving for the highest results, remember that partner brokering is a Journey, not a Destination.

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12 Developed from The Brokering Guidebook (Tennyson, 2005) and Conscious Business (Kofman, 2006).

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