

STORIES FROM PRACTICE

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TACTICAL AGENCY - Traversing the Grey Zone: Navigating Complexity

The paper reflects on the brokering identity and how 'tactical agency', linked to notions of identity and awareness of opportunities and constraints in an operating environment, can be a useful strategy when navigating complexity. The paper provides examples of how tactical agency highlights the interplay of the broker as a change agent/actor; the partnership (phases, considerations, different models) and the external environment in which these partnerships operate as well as the tactical agency that partners exercise themselves. It can be a valuable device on how to traverse the 'grey zone' drawing from learning within the humanitarian sector.

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Tactical Agency – Traversing the Grey Zone: Navigating Complexity

Introduction

This paper is about how partnership brokers can navigate complexity with the focus on the brokering identity. I introduce the idea of employing “tactical agency”¹ as an important strategy in the work of brokers operating at different levels. Agency is defined as ‘a capacity to act/ take action’. Tactical agency is that which is exercised by an individual as a reaction to context or circumstance and is dynamic, relational, contingent and based on purposive choice. It is linked to notions of identity, and an awareness of opportunities and constraints in a complex operating environment.

Partnering practice

Brokers are required to take on a diversity of roles within their partnership practice. Currently I work as an internal broker for my organisation, a humanitarian agency that belongs to a wider network, servicing several partnerships with other local and national humanitarian actors at different stages of the partnering cycle. Brokering partnerships is an explicit part of my job and complements and at times contradicts the work I do on organisational and capacity development. Not all the partnerships I work on are focused on strengthening capacity although some assume it is a subset or necessary condition/ characteristic of partnership (albeit one where there is a clear power differential). At the start of my job in 2011 I worked on this assumption too - seeing this as a corollary of previous, successful partnerships I had been involved in, within the international development sector, that were also focused on solidarity. Equally not all the organisational/ capacity development (OD/CD) work is premised on partnership relationship but more transactional collaborations².

Tactical agency is a useful mechanism for me to negotiate contradictions for example by promoting more equitable relationships after conducting a recent review of the success factors of effective organisational strengthening work – using the leverage of my OD role to enhance partnership practice. There is an everydayness to my exercise of tactical agency as I advance or withdraw different aspects of my role according to the situation, concerns, perspectives of those I work with and what I perceive are the needs and demands of that partnership premised on what may afford me more space, visibility, legitimacy and traction as a broker.

Brokering identity

Literature on the brokering identity is not in short supply³, there are classification of models and archetypes aimed at building the awareness of brokers and the characteristics they exhibit, competencies they have and can build on, and roles they inhabit. If we employ an understanding of identity as multi-dimensional and multi-layered this can deepen comprehension of how it can help or hinder the brokering role.

¹ In development literature, there are a few references to tactical agency that involve particularly oppressed groups in the context of power, resistance and rebellion. – e.g. Malaysian farmers and slavery in the deep South by James C Scott in *Weapons of the Weak – Everyday forms of peasant resistance, 1985* or work on the agency of marginalised children and young people by Joy Moncrieffe at IDS – University of Sussex. It is seen as a survival method and has elements of subversion and complicity which can be relevant for inequitable partnerships or where the focus is on changing the rules of the game. But I will not bring this into the discussion as I am cognisant that if misunderstood it can be in contravention of the brokering principles.

² based on definitions from the relationship spectrum in level 1 course.

³ from behavioural psychology, team dynamics, management science captured in the PBA self-assessment tools but also in the brokers profile

Enhancing our practice through focusing on the roles we play, encouraging reflection and developing a critical awareness of certain aspects (such as bias, prejudice, blind spots) are key to building tactical agency and are very much apparent in the PBA approach.

Much of my work, at the outset, focused on reviewing and managing transitions within partnerships, requiring an emphasis on clarifying the rationale for exit (the term used in my organisation), crucial for messaging internally and the external narrative. On one occasion senior leaders referred to the exit (ending of a partnership) as if it was a foregone conclusion and this became the pervading narrative because a few individuals decided it and others had repeated it. Being a relative newcomer I applied a position of ignorance/curiosity to really question if some of these decisions were institutional positions – i.e. a wider desire to disinvest in middle-income countries or other personal reasons to withdraw support from partners in Central Asia. I have also played a joker/ more provocative role and used the institutional arrangements to forge a new way of being/ relating and (re)building the partnership culture. For example, through changing the existing partnership narrative on exit by demonstrating that it can in fact require greater investment of resources, if there is a desire to do it responsibly which can feel counter-intuitive or exploring how to work with the private sector to derive benefit that is not purely financial.

There is a paucity of literature available on partnership exit/transition in the aid sector. It is quite taboo in my organisation, which is why I sought out engagement with other organisations in the sector struggling with similar issues, through an action learning set. The experience highlighted how this phase of partnership has many parallels with organisational change processes and the important role of emotion, ranging from celebrating achievements or holding on through fear. Through further internal work on team dynamics using Belbin, I had a realisation that I had suppressed some of the emotion and playfulness in my brokering as a way of being perceived as more professional and objective. I have actively tried to acknowledge this, using emotion, not as a tactic, but as a way of being more authentic and respectful of the personal aspects of partnership working. Some of the advice in the Moving On toolkit⁴, providing a positive framing for transitions, has been useful when having the difficult conversations.

My experience of exit has been shaped by a previous role with a local organisation in Brazil facing the departure of key European donors and partners; trying to reframe its work, attract other domestic donors, whilst desperately balancing the books to remain financially viable. Being on the other side of exit has provided a useful perspective and made me more sympathetic to local partners in my current role. However, despite trying to maintain momentum till the end of the agreed closure timeframe of a current partnership, staff from the local partner organisation have naturally made their own departures thereby creating a void in implementing what was hoped to be a responsible exit. My role now is focused on recalibrating expectations with disappointed colleagues on what is possible and realistic.

Brokering challenges

Brokers frequently exhibit a form of agency that is tactical, which is specific to context, related to multi-dimensional identity, premised on a reading of power/relational dynamics and shaped by the stage of the partnership journey and their required/assumed role in a given space.

⁴ produced by The Partnering Initiative

Brokers face challenges depending on how they are brought into a process and if they are seen as internal or external. As the former, I must continually manage the distinction and overlap between representing a partner/the partners whilst maintaining objectivity to move the partnership rather than the interests of one partner, forward. At other times I have had to juggle the partnership and the partnership outcomes (usually in the form of projects and programmes). This has led to the partner brokering and managing role to be conflated particularly if due to staff turnover or competing priorities there are gaps in implementation where certain tasks befall you as a key interlocutor and someone who is seen to be an ambassador for the partnership and ways of working. Because of that position I have been tasked with framing the partnership narrative to external audiences (with at times a push for positive bias). I have felt uncomfortable being put in this position, but I also recognise the external debates on disintermediation⁵ and a desire to demonstrate the added value of partnerships which would be difficult if the whole partnership premise is under scrutiny.

At other times I have been tasked to review the partnerships of other organisations who are part of the humanitarian network. On one occasion, one of the partner organisations wanted to use the review exercise I was asked to co-facilitate, to communicate their intention to discontinue a 20-year partnership. This became apparent in a briefing on the morning of the workshop, despite working through the agenda and expectations in advance and using a framework agreed amongst all partners. This was not just a methodological, but an ethical dilemma and the facilitation role and limitations had to be reiterated to the commissioning organisation. The workshop was re-configured to closely examine the responsibilities of each partner and elicit an honest account of the drivers for decision-making, present and future, which led to a renegotiation of timeframes and management of expectations. As an external broker it can be difficult to hold organisations to account for their behaviours or lack of commitment but I felt able to do this in that particular situation being part of the wider network; highlighting my position from a peer organisation and applying notions of horizontal accountability as someone traversing insider/outsider status.⁶ I was able to work with the external co-facilitator to reframe some of the material, ask them to step in and challenge the partners in situations where I felt compromised or if a point would come across more powerfully if articulated by them. The preparation and messaging were also key as we insisted on interchanging with the language of the local partner (which we spoke) for whom communicating in English was a struggle and translating materials in advance, so certain nuances could be communicated clearly during the exchange. Although this exercise of tactical agency was more episodic it enabled us to play different roles and use the institutional arrangements to secure a more favourable outcome for all.

Challenging partners and highlighting difference is something I feel able to do more as my exposure to different contexts has increased. In level 1 I could see that some of the tools and approaches I had developed and worked with took a lot from interest-based negotiation in mediation. Over time I have felt more comfortable to look at divergence and difference rather than just focusing on commonalities. This has been achieved by creating an enabling environment that also functions as also a safe space; identifying the emerging needs of the group (even if they differ from that outlined in the formal agenda or their stated expectations), uncovering the 'hidden transcripts' or underlying narratives

⁵ World Humanitarian summit and focus on national humanitarian action has led to debates on the aid localisation agenda and domination of international actors

⁶ The literature in level 1 is useful but there is a lack of attention on those who move back and forth between being internal and external brokers and those who work within networks.

about the partners/ partnerships that align with their interests rather than their positions and working with the most effective forms of communication (visual, verbal etc.). This is also premised on understanding the tactical agency that partners exercise themselves which may be more nuanced and subtle and takes place in the background of the partnership. It can be through the terminology adopted, what is said outside the formal agenda in the coffee breaks, the seating arrangements or it can be more overt and in the public realm such as who gets to speak, deference to others, active participation, tacit acceptance, silent sabotage. Tactical agency is not always positive or constructive whether employed by a broker or partner, but a broker has a greater responsibility to ensure it is productive through a principled approach to partnerships.

I also work with colleagues and managers on scoping and establishing new partnerships in the Middle East for which I have been able to bring in learning from other phases of the partnering cycle. The schematic which outlines the different roles and activities of brokers throughout the partnership cycle and phases has been insightful in this regard. I have gone from having to speed up a 2-year planned exit to now slow down an agreed 'entry' for two new partnerships which has presented its own challenges. This has required needing to hold the space in diverse ways as partners are at different stages of readiness to move forward, including my own organisation and the need to clarify a varied understanding of 'added value' to promote an element of mutuality.

Another important consideration is the very dynamic and at times unstable contexts of the local partner organisations. The rationale for engagement exists, based on a humanitarian imperative (after a disaster or crisis) but the absorption capacity of the partners is limited when it comes to managing new partnerships, accepting or providing financial and human resources or working in a different/ unfamiliar way. The freedom and security in the external environment in which the new partners operate is severely diminished and their ability to clearly identify what the benefits and rules of engagement are hampered. My role is then very much a protective role to identify the minimum conditions upon which partners may be ready to engage and what activities are feasible so that partnership is not an added burden but an enabler, particularly for the local/ national actor situated on the ground. This does not only apply to partners geographically situated in violent or insecure contexts but also true of organisations facing constraints owing to their internal environment – such as a leadership change, reputational crisis, precarious financial position. The readiness to partner (and to continue partnering) is also an important facet when managing and maintaining partnerships as actors face many changes outside of their partnerships, some of which are unforeseen, but also due to reverting to a default position particularly in long-term established partnerships.

Dealing with unpredictability and uncertainty has certainly been a facet of these partnerships with unclear directions, holding the space in uncertainty, navigating uncharted territory – how do you foment partnerships in some of the most unpredictable and dangerous parts of the world when it may even be difficult to engage with partners directly? There are some insights from academics on partnerships in remote management settings⁷ but I am still trying to learn more about this aspect of brokering. Tactical agency is not only deployed in situations when both or more partners are physically in the room, but how do you get a fuller appreciation of the wider system and context in the absence of direct contact, to understand and identify the best points of intervention?

⁷ Breaking the Hourglass: Partnerships in Remote Management settings – the case of Syria and Iraqi Kurdistan, Feb 2015 <http://fic.tufts.edu/publication-item/breaking-the-hourglass-partnerships-in-remote-management-settings-the-cases-of-syria-and-iraqi-kurdistan/>

At times I have strived for optimal ambiguity to avoid a conflict or buy time within a partnership where moving ahead would not be prudent or conversely recommended action without adequate information, recognising the risk and but to not act would be irresponsible or lead to missed opportunities. This has necessitated a greater tolerance for ambiguity, trying to manage my own frustrations and concerns, being able to relinquish control and accept my own limitations in order to keep engaging in an ethical and authentic manner.

Conclusion

Tactical agency highlights the interplay of the broker as a change agent/ actor; the partnership (phases, considerations, different models) and the external environment in which these partnerships operate.

Tactical agency is predicated on a level of self-awareness on the part of the broker in terms of their roles, strengths, emotions and biases and how this is manifest in their partnering practice. Moreover, brokers must situate themselves in the wider context in order to generate an analysis and develop capacity on how to navigate an increasingly complex operating environment. This includes an awareness of the tactical agency that partners exercise themselves and how to negotiate and respond appropriately but also learning how to operate within paradoxes and contradictions on agendas that may be instrumentalist or transformative or even somewhere in-between.

Tactical agency is a strategy for how brokers can navigate the grey zone:

that foggy universe of mixed motives, conflicting emotions, personal priorities, reluctant choices, opportunism and accommodation, all wedded, when convenient, to self-deception and denial'.⁸

I believe there is further analysis that could be conducted on the utility of tactical agency for brokers using the lens of power and power analysis within partnerships but also explicitly linking it to systems thinking and complexity.

⁸ The Grey Zone as first articulated by Primo Levi but defined by historian Christopher Browning, in Erna Paris, Long Shadows: Truth, Lies and History, 2000