

STORIES FROM PRACTICE

CREATED BY PARTNERSHIP BROKERS. PRESENTED BY PBA.



Balancing the ART & SCIENCE of partnership brokering

Some people are by nature more 'science' persons, others have more characteristics of the 'art' side of brokering. This paper describes the journey of an external evaluator who is usually quite results-oriented, focusing on facts, analysing, puzzling, keeping her eye on the ball and pushing for progress. The author explores the art-side of brokering in her work and how she came to appreciate it more. This shift in approach also resulted in a shift in sense of ownership, from the individual broker to all partners involved.

AUTHOR: RITA DIELEMAN

ORGANISATION: At the time of accreditation Rita was working mostly as an external evaluator for CSOs. Today is engaged in both fields, evaluation and partnership brokering.

NOW BASED IN: The Netherlands

ACCREDITED: 2015

EDITION: 8

THEME: Art and science of partnership brokering

© Rita Dieleman 2019

Final paper Rita Dieleman – PBA Level 2 Accreditation

It is by logic we prove, but by intuition that we discover (Leonardo da Vinci)



My brokering journey: balancing the art- and science side of brokering

As an external evaluator, I am used to thinking a lot to understand all types of information and theories provided by organizations on projects, programs and strategies. I research and analyse, in order to get a grip on what is happening, and especially to find out what works, what doesn't and why. Then, I work together with the people involved on how the project, program or strategy might be changed in order to become more effective, providing scenario's and suggestions as an advisor. If I look at Kolb's Learning Circle, I think, analyse, experiment and act a lot, but I don't usually reflect so much consciously on my own role. That shows from my Belbin scores from Level 1 as well: my highest scores are in the Thinking category.¹ My clients and my profession require of me that I am professionally detached rather than personally engaged², because my analysis has to be as 'objective' and unbiased as possible. So my intellect, my memory and my imagination have always been strong traits for me, rather than my senses and intuition.³

A recent personal assessment shows that I have the tendency to focus on what needs to be done, that I am results oriented, trying to get to the point and find the bottom line. Usually my emotions come second to my goals, which can be quite useful in my line of profession.⁴ This learning journey made me realize that I am - in short - more of a science- than an art-person. But the reason I began this journey, was because I felt an important element was missing in my evaluations. I sensed there was a need not only to monitor and steer programs and projects, but also the partnership process behind it. And that the one thing couldn't do without the other. So my motivation for the Level 1 training was: *'How I could play a part as a broker in defining and assessing the estimated joint results in comparison to the sum of the individual results (of partnerships) and how to measure that.'*⁵ However, now that I have entered the world of partnership brokering more consciously, I have come to realize that I don't only need more theory about what partnering entails, but also more reflection on my role in it, and why I act the way I do in order to increase the impact of my efforts in brokering.

For this journey above all other things I feel I have come to realize the importance of the art-side of brokering. This awareness has actually helped me tilt the balance between the evaluator and the broker in me more towards the 'Art' side of brokering. I am very grateful for all valuable sources I have been able to access to increase my reflective practice and to get more insight in my role as partnership broker. There was my critical friend Trish Hall with her wonderful questions about the *Beauses* and the *Why's* of my behaviour and choices. There was the wonderful journey with Helga van Kampen, working together as brokers in different partnerships and seeing how her art-focus helps partners to realise the importance of paying attention to their relationship. And there was the logbook, stimulating me to think and reflect consciously about my intentions, my actions and the implications of those actions on my environment.

Reading the logbook in its entirety again shows me, that my entries at first were mainly centred on facts. I described the situation, what was happening, who did what in each situation, what my role was, and then what I had learned, almost as a little evaluation.

¹ The 9 key team roles, adapted from Belbin.org, PBA Level 1 training day 4.

² *Brokering as a balance between art and science*. Partnership Brokers Training Course Level 1 Workbook, page 22.

³ The Case Study Toolbook: Drawing on Different Ways of Knowing.

⁴ Results from personal assessment Flagpage.com in October 2015.

⁵ Motivation letter for Pre-Course module Level 1 trainers Helga van Kampen and Bas Gadiot before the PBA Level 1 training in January 2014.

Especially after my confronting experience with myself in DRC, and helped by suggestions from Trish, my entries started to become more reflective. I started integrating my thoughts about what would happen, how I felt about what was actually happening and what my senses told me to do. Also I started to shift more from almost exclusively describing the actual partnership processes within the organizations to how my role as broker impacted that process.

Looking back at the past four months, I think about the major eye-openers and how they have affected the way I think and work. The major thing I have learned is that using my intuition and senses more consciously makes me a better broker. It helps me to reflect there and then on what is happening and what my role should be, rather than analysing it beforehand and steering the process rationally and quite directive. My DRC experience was the hardest lesson learned as it confronted me with how lost I could feel if I didn't understand my role and feel comfortable in it, but it also gave me an enormous push towards a better reflective practice and clarifying my broker's role. I feel more confident now trusting my intuition and senses during the process, because I can recognize better what is happening.

How this has affected my day to day practice, shows from a situation when a project manager asked me to think with her about how to move forward in the Disaster Management process with other EU offices. The Head Office wanted to take it slowly and her boss pushed her to move ahead. What I probably would have done before, would be to focus on the content of her proposal (follow up on action points on division of roles between offices). I would ask her what the goal of the meeting with other offices should be, what each' office' position was and give suggestions on how to get most out of it, as a consultant. Now, I reflected with her first on how she had experienced the process so far, what her position was, what her concerns were, and I kept away from the content, but rather focused on the relationships between the different parties, more as a coach. I asked questions and I listened, and I tried to bring in the perspective from different sides, to see what everybody wanted. The result was that the project manager concluded the meeting shouldn't be about the content at all, but merely to do what we had done together: reflect with other offices on their experiences with the process and the partnership itself. Also, although she asked me in advance whether I would facilitate the meeting, she decided that now was a good time to rotate the role of facilitator between offices. My awareness of what was needed in the process, helped me to let go and hand over the process to the new internal partnership brokers.

My awareness about the importance of the art-side of brokering actually contributed to all my learning goals. Using my intuition and senses more consciously and pro-actively helps me to get more clarity on what is needed in bringing together partners, as I reflected more on what was happening in the process. Moreover I shared my observations about the partnership process more explicitly with partners, inviting them to reflect about it too. I believe contributing to this awareness led to a sense of feeling comfortable because they now have more sense of what is going on, and it is more out in the open.

Although I will always be a hard-core evaluator, with the tendency to focus on facts, analysing, puzzling, keeping my eye on the ball and pushing for progress, I do believe this process has helped me to become more supportive and less directive. I have seen great examples of what happens if I leave space for dynamics to develop; people feeling responsible to take action, using their own style, looking at each other instead of at me. In short: ownership where it should be - with the partners.

What more do I want to explore about the art and science of brokering?

I have come to love my daily entries about my intentions, what actually happened and my reflections, because they provide me with better insights, than I would have with only thinking about it. That's why I have the intention of writing some reflections like that every (larger) project. Before the project starts, I will write down what my intentions are for that specific project, especially with regard to my brokering activities. During the project I will describe what it is actually happening, and reflect on it. After finalization of the project I will analyse to what extent what happened overlaps with my intentions, what changed and why, what the impact of my brokering role has been and how I look back on it. I know it doesn't take that much time and it provides me with great tangible insights. At the same time it works as a kind of reminder to pay attention to the art-side, if I fall back to my natural habit of hard-core evaluator. Of course it will be different without a mentor such as Trish to help me make most out of my reflections. But I have already asked my co-broker Helga to play the role of critical friend, and she is happy to do it. I think it will help to shape the relationship between the two of us as well, as it will help our mutual understanding as artist and scientist.

The second thing is, that I still would love to become more engaged in exploring the added value of partnerships. That's how Helga and I found each other: she was working on partnership processes, I was working on impact evaluations of programs carried out by alliances. We were both wondering what the actual added value of the partnership was on the program, and decided to research that. So many organizations are searching for how to monitor and steer the partnership process, acknowledging that the partnership process influences the results of the partnership. They are trying to find out what the added value of the partnership is for their programs, if any. That has resulted in our new company and tool: the *Partnership Learning Loop*. We are heavily investing both time- and moneywise in the development of this tool, as we both believe that if partners gain more insight in the partnership process, there will be an opportunity to discuss this and address concerns, adjust partnership policies and capitalize on the partnership potential. I hope to integrate both the reviewing- side of partnership brokering; researching what works and what doesn't in partnership processes, evaluating partner programs etc., while at the same time applying the art side of brokering into the monitoring and steering mechanism of partnerships. Both the analysis framework and the approach of the tool reflect the brokering principles and values, and we will be advocating for the importance of those throughout the entire process. What will help me I think is to gain more theoretical knowledge about partnerships. That's why I want to engage in the former Research Certificate training by PBA.⁶

Last but not least, the learning goal that I have given least attention during this learning journey, is to use different more visual and creative tools in facilitating partnership processes. Although I have been practising with some of them (such as *Creating a Collective Memory*, games etc.), I don't have a large spectrum of tools to use yet and I haven't experimented a lot with it during the past four months. I am making an inventory of courses and trainings that might help me gain more knowledge of creative tools to use and how to apply them. I am looking forward to this continued journey!

⁶ This was first a Level 2 module, but was recently changed. The PBA side now doesn't indicate a specific Research Module, but rather Advanced Practitioner Qualification. I will discuss with PBA whether this module might be suitable.