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IF THE SHOE FITS ...

Managing dual roles and accountabilities as a partnership broker

There has been a lot written about the many functions of a partnership broker, but few discuss how to balance these demands with day-to-day expectations. Some brokers are required to coordinate and manage partnership projects, and brokering is expected to happen on the side. There are positive and negative aspects to one person being both, project manager and partnership broker. Most importantly, this person must step in and out of each of their roles at the right moment, articulate these dual responsibilities to the partnership, and mitigate negative consequences such as partner dependency.

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IF THE SHOE FITS...

Managing dual roles and accountabilities as a broker

MARY FRANKHAM, 2018

E hara taku toa i te toa takitahi, he toa takitahi.

My success is not that of an individual, but of a collective.

Māori whakatauki (proverb).

This paper was based on my own experience as an independent project manager and broker, and the reflections and actions I took throughout the mentored process. Critically, the steps I took to articulate my dual role helped me to stand more firmly as a broker, to know when to take that role on and to take responsibility for the process of partnering, and to manage both roles more fluidly. This paper is not intended to reflect the position of all brokers, as there are many different backgrounds, roles and accountabilities that brokers have, but the hope is that it may have some relevance for some brokers who are likewise juggling day-to-day project outcomes with brokering needs.

My story

I work for a partnership group. My title is Project Manager, and I was brought on board to help coordinate and deliver a shared goal: to create a wildlife corridor across part of urban Auckland, New Zealand. Partners were looking for someone to keep it all together—independent of any one of their organisations, someone who could undertake both administrative and facilitative functions.

Like many partnership brokers, I began brokering intuitively—I pushed the boundaries of my job and authority with stealth, focused simply on achieving better partnership outcomes.

As fellow broker Zoe Nowark described, “I worked with common sense, gut instinct, enthusiasm, vision and tried to learn my lessons as I went along.... Although most of the time it seemed like banging my head on a wall, I loved that job so much that I kept on...”ⁱ

But while I broker my partnership now with more insight, I am also accountable to my contractual responsibilities and expectations of partners. I find myself in a difficult position of being both do-er and broker, and must hold in balance the hard requirements of my contract with the often invisible second role of partnership brokering.

Many hats and a couple of pairs of shoes

Brokers need a range of well-honed skills. Tennyson and Wilde (2000)ⁱⁱ point to the art and science of brokering, which is also defined by Hundal (2016) as, “personal engagement (art) and professional detachment (science).”ⁱⁱⁱ Partnership broker Akachukwu Nwankpo^{iv} quotes De Bono (1985), “The third party [broker] should be effective and entrepreneurial and should show skill and flair,” and describes the broker’s role as “a dance with a hidden rhythm... [that] takes tenacity and a level of integrity, which must be above suspicion.”^v

Brokers require divergent skills; interpersonal and administrative, trustworthy and risk-taker, creative and analytical, visionary and professionally detached. On top of this, brokers wear many hats, including facilitation, coaching, evaluation, mediation and negotiation.

In short, a broker must put on the appropriate hat and wear it with skill and flair. They must do the incredible—find the appropriate balance and interplay of skills at the right time to suit partners, situation, and their own accountability.

Yet Parry Agius describes how there were “numerous times where I had multiple roles because I was the driver, or left to drive the program to completion with continuity being the key to success.”^{vi}

Often at the same time as juggling multiple brokering hats, brokers must also meet certain performance expectations and job functions. We may have more than one role to fulfil, more than one pair of shoes to wear. As another broker explains “I had to learn how to broker while looking like I was doing other things!”^{vii}

It can be a challenge to fulfill a set of project obligations at the same time as empowering partners through brokering, to manage both these roles, and the partner’s perceptions or expectations of you. It requires brokers to step in and out of different pairs of shoes and there are real constraints and demands on brokers who do both.

Definitions

A ‘partnership broker’ is defined in The Brokering Guidebook^{viii} as “an active ‘go-between’ who supports partners in navigating their partnering journey by helping them to create a map, plan their route, choose their mode of transport and change direction when necessary.”

A project manager defined by the Oxford Dictionary is “the person in overall charge of the planning and execution of a particular project.”

Manager or broker?

"It's a real balancing act between trying to keep things moving and keeping people engaged," reports Promoting Effective Partnering (2010)^{ix}.

There are references in partnership brokering texts to this duality of management and brokering, but few case studies that deal with the theoretical and practical ramifications. Nevertheless, wearing the shoes of a project manager as well as broker has both positive and negative impacts for a partnership.

Positive:

- Greater ability to drive change. Rafal Serafin, who has held executive director roles in large cross-sector partnerships, describes the ability for brokers to change culture by seeing a partnership and partnership building process as a means of moving beyond business as usual. "This means being proactive in pushing for alternatives and for change rather than passively responding to the interplay between the partners engaged,"^x he says. As a project manager I have had the freedom to drive parts of the project with a new approach—for example, initiating a social change campaign in lieu of standard communications practices.
- Add benefit for partners and generate partner commitment. One of my jobs as project manager is to write a regular newsletter to the broader stakeholder network. Recent regulatory changes have had a negative impact on one of the partners. As an independent project manager, I was able to suggest to the partner that the newsletter could be used as a vehicle for information about the change and work with them on it. This provided the NGO partner significant benefit, and served as a reminder to them of the benefit of the partnership and their commitment to it.
- Take on administrative functions to reduce partner drain on resources. The Partnering Toolbook (Tennyson, 2003) identifies that

“other challenges are related to the day-to-day management tasks of the partnership’s project and activities... one person certainly needs to have an overview of the delivery process and to ensure that project staff and partners are fulfilling their commitments well and on time.”^{xi} One comment from a partner on my role recently was that without me “the partnership would fall apart”. What they meant was that without someone to call meetings, set agendas and keep everyone to task, it would be difficult to be as effective, notwithstanding the desire to partner and shared benefits of doing so.

- There for the long-haul with a deep understanding of the aspirations of the partners and the operating context. One coordinator^{xii} of a conservation network in New Zealand, who has been in her role for more than 15 years, puts the success of the partnership down to the willingness of the participants, but says “it is also important to have someone in a coordinating role that has longevity in the role, to be a familiar face through agency and community change. A constant presence is very important in sustaining relationships after they are built.”
- Able to keep the partnership focused on delivery and outcomes. I have found that discussion on partnership workings is tolerated by partners only as long as it remains clearly connected with end goals—the further discussion veers from tangible action, the less engaged the partners become. The Partnering Toolkit describes this as a risk of “a focus on the partnership for its own sake rather than for its capacity to deliver a useful programme of work. Partnering... is not an end in itself.”^{xiii} Being accountable for actions myself means the partners are aligned in purpose, and likewise share a positive sense of achievement when milestones are met or completed, even if they haven’t been directly involved in the action themselves.

Negative:

- Potential to take too much lead, and to lead from the front, with the potential risk of turning the partnership into more of a multi-stakeholder project, undermining the benefits of partnering. If the project manager is also the main project driver, their ideas and actions may take the partnership along in their own desired direction, which may differ from the preferred direction of the partners. Too much leadership/project drive may also result in partners becoming less involved or less committed to the partnership, and may impact on partnership values such as equity and openness. For me this is one of the most difficult balances to maintain, because as a project manager with the freedom to take initiative and make stuff happen, it's all too easy to leave the partners behind in your enthusiasm.
- Reduced time or focus on brokering. There is a risk that the project management actions will take priority over brokering action, as they often appear more urgent. In the first instance, my job was action only—the partnership had a general idea of what actions they wanted to happen, and got a project manager to coordinate and to get it done. But there hadn't been enough brokering to enable the partnership to work to its full capacity - to understand what the partnership was uniquely positioned to do - or for the partners to have a deeper understanding of the shared and individual risks and interests in order to generate better opportunities and more effective outcomes.
- Creation of partner dependency. Partner dependency was identified as one of the five top challenges for a broker in recent collaborative work Promoting Effective Partnering^{xiv}, and this is even more of a risk if the broker's job is also that of the 'do-er'. Bernie Ward (2011) describes how "...the broker on several occasions did things for partners that the partners were capable of doing for themselves. The partner, over time, started to expect more and more from the broker, and took on less and less work themselves."^{xv} At the

extreme, a partnership that relies heavily on their project manager will limit themselves to the project manager's individual capacity.

- Blame. Often linked with dependency, it's easy for partners to blame the project manager if something goes wrong.
- Reduced ability to broker as a neutral party or authentically "hold up a reflective mirror". Zoe Nowak described a transforming moment in brokering when she realised that "as a broker I feel that I'm no longer attached to the outcome, and in that way can be more committed to the process^{xvi}", however, if you are concurrently acting as a project manager or driver, it is not necessarily feasible or easy to remain unattached to the outcomes.
- Reduced ability to hand over the partnership brokering role given the formal accountability as project manager/driver, which encourages the opposite. "There is also a need to keep clear boundaries around the partnership brokering/process management role... Keep reminding everyone (yourself included) that the partnership is a means to achieve something; it is not an end in itself. If you lose sight of that for a minute you are bound to fail."^{xvii} Clearly, this suggests that the role of a project manager may be more long term than that of the broker. This is becoming obvious as my partnership develops – as it matures, the balance of my role is shifting away from brokering and back towards project management.

Applying 'flair' to reduce dependency, blame and other negative affects

'Flair' can be described as the ability to perceive what is necessary at any given time, secondly; balance necessary accountabilities and expectations with brokering work for the higher purpose and outcomes of the partnership, and lastly; to fluidly move between the two—"putting weight on one and then the other, and managing that necessary oscillation."^{xviii}

Is it possible to better understand our roles and reduce the possible negative impacts?

The more I worked in the role of project manager, the more the onus of responsibility shifted away from partners and onto my shoulders. Even though I recognised this issue, I struggled to moderate it until I realised it was largely due to my project manager status—or more precisely the partners' expectations of that role. It was necessary to slip off the shoes of a project manager and don those of a broker. It required planning, openness, and courage. Some things that helped:

- Coaching. I took the partners back to basics, discussing the (PBA) definition of partnership and key partnership values that underpin highly effective partnerships. We also held discussions on shared and individual risks. These discussions developed better understanding of partnerships and fostered more appreciation for the brokering role.
- Articulating both roles. If the challenge is to integrate both roles in a cognisant way, this mix needs to be explained in a way that partners understand, and so that they can appreciate the need for both—especially, the brokering side of things. I started by identifying which of my actions fitted with which role (there was some crossover) in reflective practice. I then explained my different roles with the partners, including the benefits of each and the personal challenge I face in balancing them both. I continue to recognise both roles as much as I can, such as naming both roles in my contract, speaking 'in turn' as either project manager or broker during meetings, and making it clear when I am performing the project management role. Doing this consciously not only serves as a reminder for the partners, but for myself and my reflective practice. It has also helped to;
 - increase partners' understanding of how my role/s can be best utilised to enable a more effective partnership,

- role model openness, as I share my own journey of learning and mistakes along the way,
- encourage patience and understanding of the challenge I face to both meet accountabilities, and move between roles fluidly, prompting support for me as a broker, for the ultimate benefit of the partnership itself.
- Clarification and agreement on individual partner accountabilities and contributions. The better that this is defined, the more it becomes clear that delivery and outcomes are a team effort and the partnership is not just a collaborative forum or multi-stakeholder project. In addition, clarity of who is doing what has helped to generate agreement of my priorities as project manager and capacity as an individual.
- Communication during and between partnership meetings is vital, and involving partners or their staff as much as possible in decisions or direction also helps.
- Recruit others to take responsibility. Be on the look out for a partner, or one of their staff, who may be able to pick up or share the leadership role for an action instead of you, to reduce the likelihood of leading too much from the front.
- Mitigate dependency or blame (based on Berne Ward, 2011)^{xix} include;
 - Don't assume the action is yours to pick up. Try using the ulterior rather than the social message, e.g. when a person says 'I cannot do this' rather than saying 'let me do this for you' the broker can say 'it sounds like you have a problem, what do you want to be done about it'?
 - Rather than being the motivating force yourself, use motivational tools, such as case studies, or other tools such as participative workshops or coaching tools like the Wheel of Perspectives, which helps people to see themselves from a new angle.

To lead or broker?

Tennyson (2003) states that, "Partnerships raise interesting issues about leadership. What is the role of a 'leader' in a paradigm that is essentially collaborative and based on a notion of equity between the key players?"^{xx} But here she is talking about leadership among the partners. When the broker is also a manager or driver, there are both positive and negative impacts.

A dual-role individual will need to use planning, reflection, experience and skills to determine when it's best to take a driving role, and when is best to broker for a partner-led outcome.

"In order to pick up on the subtleties of their own responses, a broker needs to be able to draw on their self-awareness and noticing skills; they need to be able to do this in the moment and to reflect,"^{xxi} says Tennyson.

However, even when a broker is a project manager or driver, they must carry their leadership out with a servant-leader approach—putting the needs of others first and helping people to develop and perform as effectively as possible. Even if your job is to drive or manage, a partnership requires the partners to maintain contribution and benefit, and the sense of doing it themselves.

Lao Tzu said, "A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves."

This aligns with typical broker personalities as identified in the 2011 PBA study *What do Partnership Brokers Do*, which found that while brokers come from many different sectors, geographic locations, and job positions, they see themselves as "someone who empowers and supports rather than someone who controls and directs."^{xxii}

Like a broker, the servant-leader is an individual who needs both art and science, blending drive and enablement together. Promoting Effective Partnerships revealed that individuals and individuality was critical in partnerships and "is manifested in what we believe are new forms of

'facilitated leadership' that promote partner participation and engagement... Our research confirms that individuals (using different blends of these skills in a range of roles) are critical."^{xxiii}

The fluidity of stepping in and out of a leadership role is not just within the individual, but within and between all participants in the partnership. To support the partnership as a whole, a dual-role broker needs to take a service-leadership approach in both their roles.

This type of leadership has been growing in popularity in the 21st century, but is perhaps more aligned with indigenous approaches to leadership, where leading and working together are not so different. It is encapsulated well in the Māori definition of leadership; rangatiratanga, the ability to lead and weave people together.^{xxiv}

A greater appreciation for partnership brokering

My key outcomes, according to my partnership, include maintaining momentum, coordinating meetings, communication between meetings, grant applications, work planning, and promoting the partnership. It is up to me to identify other partnership needs and apply brokering principles as best I can.

A partnership like mine readily identifies a need for coordination that none of the partners have the capacity to do themselves. While they have some appreciation for bringing in an external facilitator for a particular activity, as Ian Dixon (2011) describes there is "little appreciation for the role of the partnership broker or how a broker could assist the process throughout the whole partnership cycle."^{xxv}

It's likely that project managers, coordinators or drivers who perform as brokers are part of a growing need for and appreciation of partnership brokering. As more people participate in partnerships that benefit from brokering, it's expected that more partnerships will identify the need for brokering instead of or as well as coordination.

While a dual-role broker has a good opportunity to champion understanding and appreciation for partnership brokering through the partnership process, this shouldn't be the focus. "What is important is that few in a cross-sector partnership will understand or appreciate you as a partnership broker. In this regard, it does not make any difference whether you are internal or external to the partnership.... Brokering is like refereeing a football match. If you do your job well, no one will have noticed you, as attention will have focused on goal scorers and the thrill of the game. If you have done your job badly, you will be the focus of controversy."^{xxvi}

Project manager or partner?

As a project manager becomes more established in a partnership, they may share a sense of equity and investment like that of a partner. However they remain a distinct role, as they bring benefits and attributes to the partnership different to individual partners. In some cases, it may serve partnership values better if a project manager performs a job rather than the partners themselves. For instance, it may be easier to maintain equity between partners when the project manager is delivering communications.

In my experience, partners find it almost impossible think in terms of the partnership first when it comes to communications. An independent project manager can act in the best interest of the partnership, blending the information from each of the partners into a more neutral and equitable voice.

The intrinsic benefit of a project manager creating and delivering communications lies in the fact that they are *not* a partner, and that they are able to hold the space between different partner objectives.

Reflective practice and the Project Manager-Broker

In her own journal, Hundal notes that a person's role deeply impacts on their reflective practice. "In my previous role in business, I would have had no time to keep a journal. No time to remove myself from the daily busyness to be still, to reflect on what I was doing or what was happening in the many relationships I seem to be juggling every day."^{xxvii}

She identified the need for quick decision-making and action in a business world—which is more akin to project management—in contrast to the benefit of stepping back and reflecting in a brokering role. As someone who performs both roles, I found reflective practice was useful to perform more effectively as a broker, but especially helpful in its own right to create and maintain clarity between my two roles.

In conclusion

Balancing the role duplicity of both doer and broker is challenging, but not something that needs to be avoided. There are distinct and useful benefits for a partnership when one person holds both positions.

However, in order to carry out both effectively, the partnership broker must learn to identify, articulate and manage these two accountabilities and bring the partners along this journey with them.

Being aware of how the two roles can work against long-term outcomes for a partnership is also important, so that a broker doesn't become a one-stop shop, and to enable them to keep a partnership (or bring it back) to its real essence—a working relationship where risks and benefits are shared.

The *shoe that fits* is the one that is needed at the time. A broker's real role is simply to wear the right one, and wear it well.

*"Never mix up your right shoe with your left...
You'll get mixed up, of course,
As you already know.
You'll get mixed up
With many strange birds as you go.
So be sure when you step.
Step with care and great tact
And remember that Life's
A Great Balancing Act.
Just never forget to be dexterous and deft.
And never mix up your right foot with your left..."*

Oh the Places You'll Go

Dr. Seuss

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