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The duality of partnership brokering on behalf of the private sector

The author has spent the past twenty years working for and with the private sector and in this paper, she highlights her observations about the dual role that internal private sector partnership brokers must play when engaging in cross-sector partnerships. Internal partnership brokers are often expected to be both project manager and internal partnership broker and move fluidly between the roles. The paper focuses on the three key areas: the skill set required to perform both roles simultaneously; the way to address the lack of awareness and perceived value of the brokering role and; the ways to promote a better understanding of partnership brokering principles and skills.

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I. Introduction

As private sector organisations engage more and more in cross-sector partnerships, those that are responsible for managing the partnerships ("internal partnership brokers") are largely expected to possess project management skills. The role of an internal partnership broker is often not recognised as a distinct role with its own skill set, and even if it is acknowledged, it is often de-prioritised in the context of the project management responsibilities that come with the same role.

Internal partnership brokers must play the dual role of project manager and internal partnership broker and move fluidly between the roles in the context of the partnership while at the same time increasing awareness and perceived value of the internal brokering role to achieve the greatest outcome for the partnership.

II. Background

Cross-sector partnerships are beginning to be recognised as an important component of international development. With the launch of the United Nations Sustainable Development Goals (SDGs) in January 2016 came a new goal - "Partnerships"¹ - which had not previously been named in the Millennium Development Goals, the predecessor to the SDGs.

As cross-sector partnerships and partnership brokering continue to gain recognition and adoption by government, private sector and civil society organisations, there remains a gap in understanding of what is required on behalf of the partners' internal partnership brokers. Most organisations will appoint a program lead who operates as a project or program manager, and who may or may not have partnership or partnership brokering experience.

Limited information exists exploring the dual role that project or program managers must play to fulfil project management requirements as well as operating as an internal partnership broker.

III. Core

To address the duality of the internal partnership broker and project manager role as well as the low levels of awareness and adoption of internal brokers as an essential component in cross-sector partnerships, this paper will examine the three components in more detail.

Firstly, we will identify and analyse the skill sets and fluid application of those skills that one person must possess to deliver on internal partnership brokering responsibilities as well as the project management responsibilities associated with the partnership.

Secondly, we'll examine the lack of awareness and perceived value of partnership brokering and how to approach the issue. A major barrier will be removed by addressing perceptions (or lack thereof) of partnership brokering as an essential discipline and skill set required to facilitate a successful cross-sector partnership.

¹ UN Sustainable Development Goal #17 – Partnerships;
<http://www.un.org/sustainabledevelopment/globalpartnerships/>

Thirdly, we will look at ways in which partnership brokering principles and skills can be better understood in a private sector context, which will lead to increased recognition and socialisation of the role within private sector organisations that want to engage in cross-sector partnerships.

Internal Partnership Broker and Project Management Skill Sets and Fluid Application

There are similarities in the skill set of partnership brokers and project managers, and yet there are also many differences and even a different variation of the same skill that seems to overlap. Secondly, the priority of the skills of each role differs, and particularly with partnership brokering, there are skills that underscore the guiding principles of the practice and hold a different level of priority in partnership brokering activities. However, the most important difference in the two roles comes down to the core principles of partnership brokering: equity, transparency, mutual benefit and building on diversity.

Please see the chart with the indicative list of the skills of both disciplines:

Partnership Brokering Skills*:	Project Management Skills*:
<ul style="list-style-type: none"> • Confidence to hold space • Articulation and presentation • Empathy • Coaching and capacity building • Negotiation • Institution building • Facilitation • Reviewing and revising • Synthesising • Information and record keeping 	<ul style="list-style-type: none"> • Leadership • Communication • Emotional intelligence • Coaching • Intelligence • Calm • Critical thinking • Impact analysis • Budget management • Time management
<p><i>*These lists are not exhaustive but meant to be demonstrative</i></p>	

There is consistency in the common understanding of project management phases and partnership cycle phases:

- Partnering Cycle²: 1/ Scoping and Building; 2/Managing and Maintaining; 3/Reviewing and Revising; 4/Sustaining Outcomes
- Project Management Phases³: 1/ Planning; 2/ Build-up; 3/ Implementation; 4/ Close-out

To help facilitate a comparative analysis on how the dual role works in application, please see the chart detailing common activities from cross-sector partnerships. The dual role of internal partnership broker and project manager works fluidly, but the application of the skills differ in their emphasis and approach in and around the activity.

Using the partnership cycle stages as the paradigm, I have included examples from project and partnership activities in which I have been involved, so that we can see the real application of the dual roles of internal partnership broker and project manager and how the skills of both roles are applied in the context of the same activity.

² Partnership Brokers Association: <http://partnershipbrokers.org/wp-content/uploads/2010/07/Partnership-Brokering-roles-and-tasks---March-2016.pdf>

³ Harvard Business Review: <https://hbr.org/2016/11/the-four-phases-of-project-management>

Comparative Analysis Using Lens of Partnering Cycle Stages

Stage 1: Scoping and Building		
Project Activity	Internal Broker	Project Management
A/ Discussing shared project objectives amongst (potential) project partners	An internal broker would spend the time to understand the drivers and underlying interests of not only their own organisation, but also of the partner organisations. With the core principle of transparency and mutual benefit, the internal broker would work towards ensuring there is agreement on shared objectives.	A project manager would focus on the agreement of the shared objectives and the clear documentation thereof, but would not emphasise the principles of mutual benefit or transparency throughout the discussion.
B/ Establishing equity during the project's scoping of deliverables and assigning roles and responsibilities to project team members	The internal broker would be concerned with equity as roles and responsibilities were assigned to project team members. The broker would also be very mindful of the power dynamic that can play out between the funding partner and the implementation partner, and would explicitly highlight the core competencies of ALL partners to create an environment of mutual respect and understanding.	Maintaining a respectful project team environment would be the responsibility of a project manager, but the project manager would not focus on explicitly establishing a deeper understanding of core competencies amongst partners to dispel attitudes of inequity.

Stage 2: Managing and Maintaining

Project Activity	Internal Broker	Project Management
A/ A challenging situation has arisen with one of the partners not being able to deliver on a specific commitment	An internal broker would not look to ascribe blame but would aim to work through alternative solutions or approaches to the issue. Being driven by the principle of mutual benefit, the broker would recognise that the partnership should work towards the stated objectives, regardless of responsibility.	A project manager may be more concerned with the root cause analysis and clinical assessment of the problem and may not be as concerned about solving for the issue if the responsibility was one of the other partner's rather than their own organisation.
B/ Creation of a work plan	Discussing the impact of the activities in the work plan and based on the principle of transparency, hold an open discussion related to challenges the partners might face during implementation.	Listing of tactical activities that will take place, and document the timeline associated with each activity.
C/ Managing the budget	Budget management would be outside of scope.	Budget management is high on the priority list of the project manager who must pay close attention to the budget spend, comparing the budgeted vs actual amounts spent on various activities and reporting regularly.
D/ Partner contributions at meetings	Acknowledge the differences in partners and ensuring both introverts and extroverts have ways that best suit them in terms of how they represent their thoughts. Equally, considering those that are non-native English speakers or there are English speakers who are limited in contributing in the local language of the project and how the meeting environment will affect their ability to contribute equally, and proposing ways in which to address that difference.	Providing each partner with a chance to share updates at meetings and managing the process associated with the meetings.

Stage 3: Reviewing and Revising		
Project Activity	Internal Broker	Project Management
A/ Reviewing deliverables, roles and responsibilities	Explicitly naming added value of the partner's contributions and recognising the same in other partner's contributions.	Reviewing project commitments as per agreed work plan.
B/ Identifying and capturing lessons learned	Openly discussing lessons learned from the partnership experience.	Documenting and sharing lessons learned from the project only, and not focus on lessons learned from the partnership as distinct from the project.

Stage 4: Sustaining Outcomes		
Project Activity	Internal Broker	Project Manager
A/ Holding discussions about sustainability of project	The sustainability of a project would naturally be something that an internal partnership broker would consider at the outset of a project, using the topic also to examine how and when the internal broker could remove herself / himself from the partnership.	The concept of sustainability may or may not be something that a project manager is familiar with and the role of a project manager could continue to be required in the context of a partnership even if it is well established and sustainable given the requirements of the project on an on-going basis. The need for a project manager is not an indication of the sustainability of the project, per se.
B/ Helping partners celebrate and learn from their partnership story.	The internal broker would focus on identifying and capturing the partnership-specific benefits from the project that would be above and beyond the project objectives themselves. Often there would be unintended outcomes that are worthwhile documenting and sharing that fall outside of the project agreement.	The project manager may be responsible for working on the case study of the project and documenting the objectives, process and outcomes.

Lack of Awareness and Lack of Perceived Value of Partnership Brokering

A lack of awareness and a lack of perceived value about partnership brokering is a major hurdle in the acknowledgment of partnership brokering's role and added value in a cross-sector partnership.

A strategy built around influential people and processes is an impactful way to raise awareness and change perceptions.

The first step is to conduct stakeholder mapping. This activity entails the identification of the most important and influential stakeholders who can change perceptions and become spokespeople or ambassadors for the value of partnership brokers and their skill set. A typical list of stakeholders would include: 1/ Senior leadership within the partnership; 2/ Internal brokers from the organisations within the partnership; 3/ People responsible for external and internal communication about the partnership; 4/ Roles responsible for funding the partnership.

Once the stakeholder mapping is conducted, this is a list of tactics that could be used with each stakeholder or stakeholder group. The tactics could be applied at various stages throughout the partnership, given that the opportunity to engage with the stakeholders may only present itself at different times, and not necessarily at the outset of the partnership:

- Senior leadership within the partnership: Hold sensitisation sessions with senior leadership within partnerships through a round table or conference call as the initial partnership discussions take place. Discuss the attributes of the partnership brokering and how they differ from or complement project management, and the benefits of using a partnership broker in the partnership.
- Internal brokers from the organisations within the partnership: Discuss internal brokering principles with internal brokers from the organisations and work towards agreement and commitment to abide by them throughout the partnership. Regardless of whether the others identify as “internal partnership brokers” the principles of brokering are easy to understand and having an open discussion about the commitment to the principles up front will enable the same individuals to be mindful of their application throughout the partnership and enable them to raise concerns if they feel the principles are not being upheld.
- Roles responsible for external and internal communication about the partnership: Document the output, outcomes and benefits of internal brokering activities, specifically differentiating them from project management skills and outcomes. Discuss the most effective way to share the insights within the partnership and within partner organisations as appropriate. Discuss how to share the same insights and examples with external stakeholder organisations, like the UN and multilateral or bilateral funding agencies that invest in cross-sector partnerships.
- Roles responsible for funding the partnership: Encourage cross-sector partnership funders to insist that those in management positions within the partnership possess partnership brokering certification or minimum experience managing cross-sector partnerships and familiarity with the concept of internal partnership brokers. Embedding the requirement of a certification or minimum years of experience raises awareness and embeds the requirement within the partnership process at the outset of the partnership.

Making Partnership Brokering Principles and Skills Understood

Of all three sectors – government, civil society and the private sector - the private sector has the lowest involvement and experience in addressing development issues other than purely through philanthropic or CSR efforts, or through the delivery of products and services that might address a deeply felt, poorly met need of an underserved or underprivileged community.

As private sector evaluates a cross-sector partnership, the “business benefits” must always be very clear. Whether this is articulated as return on investment (ROI), or other key performance indicators, it is important to articulate the value of partnership brokering principles and skills and how they support the achievement of the business objectives of the private sector. The more effectively we can do this, the more support there will be by private sector in the requirement of the partnership brokering principles and skills.

As such, the communication of the principles and skills should be framed in a format that is relevant for the private sector.

The reasons for private sector engagement in cross-sector partnerships can broadly be grouped into three categories: 1/ Support for communities and causes; 2/ Engagement with key stakeholders and; 3/ Incubating shared value. Using the categories as the framework through which to communicate the benefits of partnership brokering principles and benefits positions their value from a private sector perspective*.

Business Rationale for Private Sector Engagement in Partnerships

Reason #1: Support communities and causes

The private sector organisation wishes to positively affect relevant issues in locations where it operates and is interested in being considered a “good corporate citizen”. Private sector would contribute time, funding or in-kind resources to address the issue that is relevant to the community, and would expect to build a positive public reputation through the partnership. Private sector would expect to be depicted as a trusted partner within the partnership and especially of the civil society or government organisation.

Partnership Brokering Principle: The brokering principle of mutual benefit ensures the partnership is established to deliver benefit for all in the partnership and commits to working towards a partnership where all partners benefit. This would assure the private sector that the structure of the partnership was not one-sided in their favour and that the value of the partnership to all partners could withstand public scrutiny.

Reason #2: Engage key stakeholders

The private sector develops an understanding of what employees, customers, regulators, key business relationships, civil society value and then designs programs and partnerships to address those priorities.

Partnership Brokering Principle: The brokering principle of equity supports the development of partnerships that ensure balance between the private sector organisation and the other partners. Whether the partnership is based on employee values, or those of customers, it is imperative that the key stakeholders feel the partnership achieves equity for all involved.

Reason #3 Incubate shared value

The private sector invests in a shared value model, supporting the conditions for long-term growth and profitability, including risk reduction.

Partnership Brokering Principle: The brokering principle of transparency is of value in a shared value model where the private sector organisation is developing a product or service for the bottom of the pyramid. There can be sensitivities when private sector targets this demographic because of their vulnerability so the principle of transparency is particularly valuable in partnerships with a shared value business objective.

**The list is demonstrative but not comprehensive*

IV. Conclusion

As a discipline, partnership brokering is not yet widely recognised by the private sector. Raising awareness about the unique skills that an internal partnership broker brings to a cross-sector partnership and how the skills can co-exist fluidly with those of a project manager, will help to establish partnership brokering as a recognised practice. By demonstrating how partnership brokering directly contributes to achieving business objectives, the private sector will come to see partnership brokering as an important contributor to the success of the private sector in cross-sector partnerships.