

Scaling Community Capacities To Lead Collaborative Change Processes

Terms of Reference: Programme Data & Learning Coordinator

Background

PBA, the Conrad N. Hilton Foundation and Porticus are collaborating with partnership brokers and communities in three regional locations (East Africa, The Pacific and South Asia) to co-develop a programme ...

*...to embed collaborative leadership and partnership brokering practices
at local and community levels, to drive transformative change*

In order to achieve this goal, we envisage that the following will be key to progress (noting these will be refined as we engage more deeply):

1. IDENTIFY & STRENGTHEN partnership brokering capability among community-based practitioners located in three regions: East Africa (Uganda and Tanzania); The Pacific (Fiji and The Solomon Islands); and South Asia (West Bengal and Goa in India). This geographic work will be led by three 'Regional Convenors', who will work with other local practitioners to provide skills, approaches, practical frameworks and models of collaborative leadership that can be applied with confidence and courage to a range of multi-stakeholder programmes.
2. CONNECT & COMMUNICATE by co-creating a mobile application (a partnership brokering app, or PBApp) to connect community-based partnership practitioners within and across countries and continents, designed to: exchange context-specific experiences; inform national/ regional/ international policy and strategy-making and to provide access to up-to-date resources and information on partnership brokering.
3. EVIDENCE & LEARN about the evolving practice of partnership brokering through the experience at community levels.
4. BUILD & SUSTAIN a business model that can enable the continuation of such community-centred partnership brokering and collaborative leadership.
5. EVOLVE & STRENGTHEN PBA's own organisational progress and evolution, so that it can adapt and change in response to emerging needs.

The Annex provides a full summary of the programme.

Scope of work

The Programme Data and Learning Coordinator will facilitate the execution of the 'Evidence & Learn' workstream. This encompasses both the M&E aspects of the programme (and reporting requirements to our funders and partners) as well as the learning about partnership brokering through the experience of community-based practitioners. In addition, they will offer administrative support to the planning and tracking processes overseen by the programme's Process Coordinator.

The key focus of the learning approach will be to hear voices of the community practitioners and their experiences of any change brought about through their application of the partnership brokering approach. Critically, monitoring, evaluation and learning must be woven into the fabric of this

programme – it cannot be an add on. It must evolve as the regional work evolves and be fit for each context. Our ambition is that the monitoring, evaluation and learning approach will in and of itself promote self-determination.

Other countries will be interested to learn from, and contribute to, this programme - such as Indonesia, Bangladesh and Nepal. The Programme Data and Learning Coordinator will create mechanisms for such two-way fertilisation. This will be invaluable for the programme achieving wider reach and influence.

More broadly the lessons that emerge from this community-generated work will feed into PBA's learning, and its rapidly expanding global training programme, enabling us to revise our courses to respond to, and reflect, community/ local needs and priorities.

The monitoring, learning and evaluation plan will be co-evolved with the three Regional Convenors and place-based practitioners, so that they define what "success" looks like. Activities that could be included are:

1. A kick off meeting (online) with those involved in learning and evaluation to explore what they think is important to know about the project's impact. What lessons would they value? What would they wish to understand (better)? Based on this, the group will determine what should be measured and their priorities for criteria of success.
2. A baseline 'scoping' of the six locations, to capture perceptions, experience and gaps of multi-stakeholder collaborations and partnerships and community engagement with and in these. These baseline profiles will inform the contextualisation of the training design as well as the basis for comparison with profiles captured at the end of the project.
3. Collecting partnership stories within the project from the different contexts and countries, possibly using the app developed for connecting and communicating.
4. Using continuous input from learning within communities and between partners as input for the resource hives – the regional groupings of partnership practitioners convened by the Regional Convenors. At the end of the programme, all data collected this way can be used for desk research on the effectiveness of the project.
5. Learning and reflection meetings at each phase of the project and at the end with the Regional Convenors to discuss stories, insights, findings, learnings and the added value of partnership brokering in diverse community contexts.
6. Communicating learning across the PBA-Hilton-Porticus-Regions eco systems as well as among the community practitioners.

There will be need to reflect on the project's theory of change and the hypotheses formulated at the outset, and to then recommend any course-correction changes that may be required.

The key outcomes will be jointly generated and documented quantitative as well as qualitative evidence of change that emerge from the various learning channels, as experienced, identified and articulated by community practitioners and other local stakeholders.

Key attributes needed

The Programme Data and Learning Coordinator will need to have significant experience in developing adaptive and emergent monitoring and learning approaches to suit multiple purposes – monitoring the programme's progress; learning about the value of partnership brokering in community-based settings; and capturing stories about change processes. It is currently envisaged that the development of a partnership brokering App will be a key instrument through which data and learning will be gathered (from users of the PBAApp) and shared (back to all users as well as other interested people (such as

alumni of PBA's various training courses; Associates; other philanthropies and so on). The Learning Coordinator will be required to work collaboratively – embodying PBA's values – to co-create these systems and processes with others involved in this programme. They will need to have proven experience of working in multi-location programmes, and of building, managing and supporting teams online. They will need to hold both a strategic as well as a detailed perspective, to ensure that relevant information is captured along the way, to meet the programme's multiple needs. The Learning Coordinator will have a strong track record in monitoring/ evaluation/ learning; skills in designing and using both qualitative and quantitative data-capture techniques; and proven ability to apply a range of analytical tools to these.

The person will be expected to have:

- Excellent proficiency in English
- A working ease with Microsoft software (Word, Excel, PowerPoint)
- Ability to work with the full functionality of Zoom for online meetings

Remuneration

The programme will commence in January 2023, and continue for a period of 18 to 24 months. (The programme is currently contracted to the end of April 2024, though a no-cost extension may be necessary).

The Programme Data and Learning Coordinator will be remunerated at the rate of USD 500 per day, for up to 80 days across the programme's duration – totalling up to USD 40,000.

It should be noted that the workload will vary, month on month. There will need to be a more intense period in the early stages, to establish the ways of working across the three regional locations and programme stakeholders involved at all levels. Once momentum is built, it is likely that this will then shift to more routine weekly oversight, supporting data gathering and learning processes. There may also be deeper time-investments needed should specific activities be required – such as a survey, or mapping (as co-created with individuals involved in this programme in different places across different functions).

Reporting

The Programme Data and Learning Coordinator will report to the programme's Process Coordinator, responsible for overseeing and 'holding' the entire initiative. They will also work closely with the Regional Convenors and country-based partnership brokers in orchestrating the various avenues for data collection and collective sense-making; the PBA Associate leading on the development of the *PBApp*; and PBA's Lead on Learning.

Applications:

The deadline for applications is 5th February 2023.

Please address your application to Lola Gostelow, PBA Lead Services and send to:

info@partnershipbrokers.org

ANNEX - Programme Summary

Problem Analysis

Community engagement and local leadership in multi-stakeholder collaborations is, by any measure, deeply inadequate – across continents, cultures, and socio-economic contexts. CIVICUS identifies that *“The space for civil society to promote rights and pursue social justice has always been contested, but recent years have seen a greater range of states attacking civil society, including ostensibly democratic states”* ([2021 State of Civil Society Report – Overview](#)). This is a mirror of the entrenched power dynamics that exist everywhere and are being challenged through global movements such as those concerned with decolonisation and localisation – but change remains painfully slow.

The Partnership Brokers Association (PBA) is committed to contributing to such change by: 1) even more actively advocating for a disruption to the status quo and even more intentionally designing training, accreditation and mentoring processes that categorically bring communities into the heart of collaboration processes, and into the heart of the partnering ecosystem; and 2) by strengthening communities’ mindsets, skills, confidence, and courage which are needed for them to be at the heart of collaborative processes. The latter is the primary focus of this application – scaffolded by the former – which is the ongoing work of PBA.

Only when the partnering eco system status quo is disrupted will partnering move from a global North cliché to partnering as a mechanism for global South transformation. In future, communities would lead the agenda about their own futures and contribute from their own range of resources, alongside those of others, to bring about transformative change. When that change influences and impacts more widely, then the very systems that have perpetuated the entrenched power disparities will change and social justice will become a reality.

In the experience of those we work with in many different contexts across the globe, the current partnering status quo falls very far short of both meeting need and in realising its potential as the paradigm most likely to lead to transformative change and social justice.

This programme is designed to provide a unique opportunity for individuals with responsibilities to enable change at community level to be heard, to be more influential and to be able to share their insights and experiences with others and thereby help bring this approach to scale. Building the range of capabilities that are necessary for effective partnership brokering (the skilled practice of partnership process management) will enable these individuals, who are the community-based partnership brokering practitioners, to help shape and build more truly inclusive partnerships suitable for their specific context. By enabling peer-to-peer exchanges within and across locations in Africa, South Asia and the Pacific, the programme will connect community-level practitioners across a rich diversity of contexts and conditions in a growing global movement of change-makers. The lessons and approaches will be folded back into PBA’s global training and advocacy work.

Project Description

Working in collaboration, PBA, a community reference group (CRG) and Porticus invite the Hilton Foundation to support and work with us...

....to embed collaborative leadership and partnership brokering practices at local and community levels to drive transformative change.

In order to achieve this goal, we propose to accompany community-based practitioners by:

- **Leveraging** what has already been achieved through the pilot programme run in four countries;

- **Expanding** to new places, communities and individuals, where there is a clear need and where PBA Associates are helping to drive collaborative change processes;
- **Co-creating and contextualising** the content and processes with community and local practitioners from the start – working to a principle of full engagement, with no element of imposition;
- **Building momentum** in each place - through local 'resource hives' (exact term to be agreed with community practitioners in phase one of the project) that will provide on-going support and promote collaborative efforts at community level in each country / region whilst also connecting to a global movement for change;
- **Exploring, testing and learning** at all levels throughout the program and making active linkages: to PBA training and advocacy; to relevant initiatives that other PBA Associates, alumni and partners are involved in; as well as to wider change agendas, specifically but not exclusively the Agenda 2030's Sustainable Development Goals.

Five work streams are required to deliver this project holistically:

1. IDENTIFY & STRENGTHEN partnership brokering capability among community-based practitioners through a cascading process.
2. CONNECT & COMMUNICATE - community-managed connectivity, exchange, learning and advocacy.
3. EVIDENCE & LEARN - continue to evolve the practice of partnership brokering globally on the basis of experience.
4. BUILD & SUSTAIN a business model that can enable the continuation of such community-centred partnership brokering and collaborative leadership.
5. EVOLVE & STRENGTHEN PBA's own organisational progress, able to adapt and change in response to emerging needs.

Project Characteristics

Geographic Area Served

The project will work in-depth in three regions where PBA Associates are supporting community-based practitioners to evolve more effective and impactful partnerships – covering concerns including combating gender inequality, adaptation to climate change, freedom of expression, and improved basic services, particularly as experienced by young people. These regions are: Africa (Uganda and Tanzania); The Pacific (Fiji and The Solomon Islands); and South Asia (West Bengal and Goa in India).

Expected Results

1. IDENTIFY & STRENGTHEN partnership brokering capability among community-based practitioners through a cascading process.

Objective 1: Strengthen local capacities in partnership brokering by providing skills, approaches, practical frameworks and models of collaborative leadership that can be applied with confidence and courage to a range of multi-stakeholder programmes.

Activities:

1.1 Co-create the scope of work. Design the baseline assessment approach and tools, and conduct the baseline. Design the learning and monitoring framework and co-define what success will look like with community-based practitioners.

1.2 Design the support programme/ course for community-based practitioners, building on the baseline findings, the earlier pilot; contextualize the materials and create new ones as per need.

1.3 Get ready - Prepare the Regional Convenors and place-based partnership brokers to undertake activities with the community practitioners.

1.4 Implementation - Conduct capacity strengthening activities for community practitioners through phased training and other types of support as agreed in three of the six locations; cascade mentoring support to Regional Convenors and community-based partnership practitioners.

Outcome 1: An accessible resource of localised materials; used in three trainings in three locations; supported by functional resource hives in three to six locations with up to 60-120 programme graduates and other community practitioners participating in learning processes; Regional Convenors become accredited partnership brokers.

2. CONNECT & COMMUNICATE - community-managed connectivity, exchange, learning and advocacy.

Objective 2: To co-create a mobile application (a partnership brokering app, or PBAApp) to connect community-based partnership practitioners within and across countries and continents designed to: exchange context-specific experiences; inform national/regional /international policy and strategy-making and to provide access to up-to-date resources and information on partnership brokering.

Activities

2.1: Test and revise the PBAApp's scope with the testing groups, including the community-based partnership brokers involved in the previous domain of activities; identify the app development agency to define a technically detailed plan for the user experience and the user interface design.

2.2: Develop the content for the app as well as the software to host the content.

2.3: Launch and test the PBAApp; - test revise.

2.4: Refine the functionality to get the PBAApp fully operational.

Outcome 2: A free-to-download Partnership Brokering App (PBAApp) that it is a highly visual digital platform that enables learning and exchange across places and people.

3. EVIDENCE & LEARN - continue to evolve the practice of partnership brokering globally on the basis of experience.

Objective 3: Capture and communicate evidence on the added value of partnership brokering in diverse community contexts, working closely with partnership brokering practitioners operating actively at the local or community level.

Activities:

3.1: Invite feedback from community partnership practitioners participating in the support activities.

3.2 Capture learning and stories of experience, and compare these to baseline information.

3.3 Reflect on the project's theory of change and the hypotheses formulated at the outset; course-correction if required.

3.4 Communicate learning across the PBA-Hilton-Porticus-CRG eco systems as well as among the community practitioners.

Outcome 3: Jointly generated and documented quantitative as well as qualitative evidence of change as experienced, identified and articulated by community practitioners and other local stakeholders, and as they emerge from the various learning channels.

4. BUILD & SUSTAIN a business model that can enable the continuation of such community-centred partnership brokering and collaborative leadership.

Objective 4: Evolve a sustainable business model for strengthening capacity for more effective and transformative partnership brokering at community and local levels.

Activities:

4.1 The Regional Convenors and in-country brokers taking part in the project will develop into local resource persons and constitute partnership brokering resource hives, who will develop their professional practice to help shape and manage local collaborations and support local actors in their partnering with local, national and international players. These locally-generated resource hives will be linked to PBA's emerging partnership brokering network which seeks to bring about change and influence in the partnering eco-system by offering a platform for: peer-to-peer learning; a dynamic support network that is essentially self-organising and building a coherent voice to advocate for more effective and transformative partnering approaches worldwide.

4.2 Ongoing discussions and reflection on mechanisms and governance arrangements that can create and strengthen the resource hives, and remain linked to the global entity – PBA.

4.3 Manage the project funds in a way that decisions are made locally for the local activities, and there is openness about how funds are allocated. Regional Convenors will be encouraged to mobilize additional resources to expand and sustain the activities.

Outcome 4.1: Community practitioners are able to access support at country and global levels to continue to strengthen their skills and build confidence, and will work towards a business model that supports their sustained functioning beyond the term of this project.

Outcome 4.2: New lessons emerge that are relevant for decision-makers and key players including funders and resource providers wishing to work collaboratively in helping build sustainable business models for the work they support.

5. EVOLVE & STRENGTHEN PBA's own organisational progress, able to adapt and change in response to emerging needs.

Objective 5: Support the experiment in collaborative organisation management by strengthening PBA's own organisational capabilities across its three core functions: provision of vocational training and formal qualification; the social business that provides programmes and support to strengthen partnership approaches across the globe; and hosting the global network for learning, sharing, supporting and promoting partnership brokering practices.

Activities:

5.1. Harvest learning and plough it back into PBA vocational courses, services and advocacy strategies and frameworks to strengthen communication and collaboration between the local and the global. Trial how best to offer professional accreditation to community-based practitioners, so that the process is appropriate and upholds PBA's global standards.

5.2: Co-funding for PBA leadership in further steering, shaping and strengthening the organisation so it becomes more sustainable and influential.

5.3: Explore governance and communication arrangements that can strengthen the global network to engage with, and draw lessons from, local practitioners.

Outcome 5: The Partnership Brokers Association is significantly stronger as a collaborative and decentralised entity, with wider reach and influence and deeper impact, whilst upholding international recognition for its formal qualification (accreditation). A paper will be produced with reflections and recommendations on how to proceed to strengthen the distributed network with local as well as global partnership brokering practitioners.

Learning and Evaluation

Learning based on practice and challenging, changing, evolving the practice based on the learning is at the core of PBA approach. Conventional monitoring and evaluation approaches sometimes miss the layers and nuances of the value of a project and sometimes may even undermine or damage a partnership. Several PBA Associates are M&E specialists and have pioneered collaboration-appropriate ways of reviewing programmes that are defined and designed by the stakeholders themselves. Different approaches such as outcome harvesting ([IDRC, 2001](#), [Sarah Earl et al. Outcome Mapping – Building Learning and Reflection into Development Programs](#)), and perception research ([DFID, 2012](#); [Sian Herbert, 2013](#); [SLRC, 2017](#)) have been used as resources to evolve fit-for-purpose approaches to review partnerships. The key focus of the learning and evaluation approach will be to hear voices of the community practitioners and their experiences of any change brought about through them applying the partnership brokering approach.

Critically monitoring, evaluation and learning must be woven into the fabric of this project – it cannot be an add on or a place for external experts who will be “other”. It must evolve as the projects evolves in place and be fit for context. In and of itself the monitoring evaluation and learning must promote self-determination.

The evaluation plan will be co-evolved with the Regional Convenors and place-based practitioners, so that participants and partners define what “project success” looks like.

Budget

The Hilton Foundation is contributing USD 500,000 to this programme.

In addition, Porticus is contributing USD 15,000 to support the learning agenda; and a PBA Associate has donated GBP 10,000 (USD 11,720) to support the exploration of new pathways to accreditation that are specifically suited to community-based partnership practitioners.

Personnel

Process Coordinator

This role will hold the whole endeavour by:

- Overseeing all work, and monitoring progress.
- Brokering the overall partnership of Porticus; Hilton Foundation, PBA and CRG, and facilitating regular (6-weekly) meetings.
- Providing support to the three regional convenors.
- Maintaining oversight of the learning threads throughout.
- Reporting on progress.

The Programme Data & Learning Coordinator will facilitate the execution of ‘Evidence & Learn’ component, which, itself, will feed into the overall project monitoring and evaluation plan. The Programme Data & Learning Coordinator will work closely with the Regional Convenors and country-based partnership brokers, in orchestrating the various avenues for data collection and collective sense-making. In addition, they will offer administrative support to the planning and tracking processes overseen by the Process Coordinator.

Three Regional Convenors (Asia, The Pacific and Africa)

These will be the primary enablers for objectives 1-4, providing leadership in:

- Recruiting community practitioners for trainings and ongoing support.
- Adapting and contextualising existing training materials.

- Co-facilitating trainings in each of the 3 regions.
- Capturing stories of felt benefits of partnership brokering to local stakeholders.
- Providing support to graduates of training programmes.
- Establishing and convening regional 'Resource Hives'.
- Participating in peer-to-peer learning.
- Contributing to the design and testing of the Partnership Brokering App.
- Overseeing the draw-down from their respective regional 'Localisation Fund'.
- Seeking additional funding to support additional training cohorts in their regions; further training or accreditation for any community-based practitioners with potential to be partnership champions; and/ or to fund specific experiments or activities identified as priorities.

Country-based Partnership Brokers

These are the primary agents of change in the communities/partnerships in which they operate. They will be offered honoraria in appreciation of their support, and will work in close collaboration with the relevant Regional Convenor to:

- Review and adapt PBA materials, selecting and configuring what is relevant to their contexts and situations, proposing modifications and new materials.
- Participate in PBA training as needed and as necessary.
- Translate/ transpose to local languages and communication forms that 'make sense' locally.
- Record their experience for sharing and wider learning.
- Network with other community-based brokers for mutual learning and support.
- Draw on PBA Associates for support as needed and as relevant.
- Record experience/ interventions/ impact of the multi-stakeholder partnership they are involved in.
- Propose and implement innovation grants to accelerate impact.

Community Practitioners

These individuals from the six localities will be offered honoraria in appreciation of their inputs to the design and testing of the App. They may also be called upon to advise on new illustrations, or the design/ testing of new contextually appropriate tools.

PBA Associates Accompanying and Supporting

These long-standing and highly experienced Associates will:

- Provide training, mentoring, coaching, tools and other support services as needed to community-based partnership brokers.
- Organise workshops and/ or write shops, where needed and as relevant to community-based partnership brokers.
- Facilitate/ enable peer-to-peer learning and support between regions.
- Support 'sense-making' and communication of lessons learned.
- Provide administrative support & help with local/regional resource mobilisation

Several core functions are included that provide oversight for key areas of PBA's work, all of which are relevant for the effective delivery of the current project: the design and implementation of the pathways to accreditation; capturing and embedding learning in our training and supporting services; coordinating the global reach of online and in-person training, and co-evolving new material and courses based on experience and new thinking; the running of PBA's administrative and financial operations; the design of bespoke services in response to requests for support from organisations and partnerships; and the strategic oversight of PBA, the connects with the PBA's board as well as with all Associate members. The request to the Hilton Foundation amounts to 30% of these costs.