Partnership Brokers: Helping us to Partner Better

Ros Tennyson
[My partnering pedigree]

International Business Leaders Forum
1992-2011

the partnering initiative
2002-2009

PARTNERSHIP BROKERS ASSOCIATION
LEARNING • TRAINING • TRANSFORMING
(2003) + 2012 - PRESENT

PEP
Promoting Effective Partnering
2015 - PRESENT
A session in 3 parts:

1. Introduction: Some general observations on partnering

2. What is partnership brokering and how can it help ensure better partnering?
   Discussion / Challenge / Q&A

2. What is the role of partnership brokers in monitoring and evaluating partnerships
   Discussion / Challenge / Q&A
Introduction

Some general observations on partnering
PROCESS matters

(Partnerships that ignore process and that focus entirely on projects are likely to be less sustainable and less transformational)
The Partnering Cycle

- Scoping needs & options
- Identifying potential partners
- Building relationships
- Mapping & planning
- Governance & structures
- Deepening engagement
- Delivering projects
- Measuring results
- Reviewing efficiency & value
- Revisiting & revising
- Scaling & increasing impact
- Moving on

Adapted from: The Partnering Toolbook
CONTEXT

matters

(Partnerships are extraordinarily vulnerable to context and this is often overlooked in the focus on being ‘global’)
Contextual influences listed by importance
(as reported by partnership brokers working in a range of contexts)

Economic: 71
Political: 60
Societal: 56
Cultural: 49
Geographic: 36
Historical: 27
Other: 21
PRINCIPLES

matter

(But principles quickly become formulas so they may need to be reviewed and refreshed by every partnership)
### Partnering principles in practice

<table>
<thead>
<tr>
<th>Overcoming:</th>
<th>Will lead to:</th>
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<tbody>
<tr>
<td>POWER IMBALANCE</td>
<td>EQUITY</td>
</tr>
<tr>
<td>HIDDEN AGENDAS</td>
<td>TRANSPARENCY / TRUST</td>
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<tr>
<td>COMPETITION</td>
<td>MUTUAL BENEFIT</td>
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But we might be better to focus on issues of:

- CONTROL
- "INTERIOR CONDITION"
- INTERDEPENDENCE
key partnering principles

**From Gambia:**
- Recognise informal partnerships are just as important as formal ones.
- Manage power imbalance especially in difficult contexts.
- Have respect for what everybody brings to the table
- Alignment of expectations

**From Nepal:**
- Politically neutrality – politics is consciously avoided
- Inclusivity (reaching out to the marginalised)
- Knowledge available to everyone
- Potential for up-scaling
- Fostering regional / cross-country cooperation
- Take account of different capabilities
- Enable more capable countries / players to help others

**From Mauritius:**
- A clear common goal/vision
- Someone good in the partnership brokering role
- A well developed / co-created agreement
- Conscious individuals
DONORS matter

(They can enable or constrain partnering effectiveness, innovation and impact – whether they are enabling or constraining is rarely discussed)
Issue of ‘compliant’ vs ‘disruptive’ partnerships
(partnership brokers suggest that a very high % of partnerships are essentially ‘compliant’)

PEP
Promoting Effective Partnering
IMAGINATION matters

(In our commitment to due diligence, rigour, risk-containment, monitoring and evaluation etc. we lose focus / will / capacity to build on diversity and to partner in ways likely to transform)
Positioning partnerships

1. **REACTIVE**
   Partnership as a strategy to deliver projects within the framework of the existing status quo

2. **ADAPTIVE**
   Partnership designed to deliver development somewhat separate from, but alongside, the mainstream

3. **TRANSFORMATIVE**
   Partnership intentionally created to challenge and change mainstream systems and mindsets

More need for partnership process management aka partnership ‘brokering’
What is ‘partnership brokering’ and how can it help ensure better partnering?
Attempting a definition

A **partnership broker** is 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.

Partnership ‘broker’ is the term increasingly used internationally but if is problematic in certain contexts there are a number of alternative terms including:

- ‘process manager’
- ‘change maker’
- ‘intermediary’
- ‘bridge-builder’
- ‘animator’
- ‘integrator’
- ‘connector’
- ‘servant leader’
- ‘boundary spanner’

PARTNERSHIP BROKERS HELP PARTNERS TO OPERATE IN COMPLEX SPACE
Understanding ‘complexity’ (and its relevance to partnership brokering)

Complex
- Cause & Effect coherent in retrospect, do not repeat
  - Complex adaptive systems
  - Multiple options
  - Emergent Practice

Complicated
- Cause & Effect separated by space and time
  - Systems thinking
  - Domain of experts
  - Good Practice

Chaos
- No Cause & Effect relationships perceivable
  - Focus on action to stabilise
    - Crisis management
  - Novel practice

Obvious (Simple)
- Cause & Effect relations repeatable & predictable
  - Process re-engineering
  - Rules, procedures, standardised
  - Best Practice

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Partnership broker’s relationship to the partnership

An **internal** partnership broker is an individual who helps to: prepare their organisation to be effective partners by negotiating partnerships and / or maintaining and managing a partnership arrangement and / or tracking the partnership’s impacts.

An **external** partnership broker is an independent third party contracted to: scope, plan or facilitate the early stages of a partnership; develop a partnering agreement; research, maintain, monitor, review or evaluate a partnership over time.

There are advantages and disadvantages to both
10 tips for helping partners to create more transformational partnerships:

- **Develop a culture of reflection** as well as efficiency in every partnership (the best reflective practices lead to far greater efficiency)
- **Communicate** continuously, appropriately (for each partner) and imaginatively (to envision how things could be different)
- **Use real examples from elsewhere** – in the form of stories, dialogues, visits, case studies that share process – to inspire confidence and courage to partner bravely
- **Ask well-framed questions** as the key to unlocking potential (often better to bring the much-needed question rather than a pre-prepared answer)
- **Plan and make everything outcome / output and impact focussed** by creating and adapting (and, above all, explaining) genuinely fit for purpose tools
- **Build partners’ partnering capacity and skills** (including the skills required to challenge and change ‘business as usual’ mind sets and empty protocols)
- **Encourage / support partners** to be available, direct, open and brave
- **Explore different / divergent views** (and don’t ‘smooth over’) so that they can become triggers for innovation
- **Help partners hold the space** for ideas and solutions to emerge (don’t force the pace or narrow the options too soon)
- **Be clear that partnering may not be the most suitable mechanism** for what is needed and be able and willing to sign-post to a constructive alternative
“This research breaks new ground in the sense that it seeks to personalise / personify thinking about partnership brokering and present it as a human process rather than an abstract, theoretical construct.

In this way, partnering (and partnership brokering specifically) contests ‘business-as-usual’ or, to be more precise, the ‘command-and-control’ approaches that dominate.”
The Partnering Cycle

Adapted from: The Partnering Toolbook
Partnership brokering roles at different stages in the partnering cycle

**SUSTAINING OUTCOMES**
- Exploring moving on options and supporting decisions
- Managing closure / moving on processes collaboratively
- Helping partners celebrate and learn from their partnership ‘story’
- Ensuring outcomes are able to be sustained / embedded / scaled /transferred

**SCOPING & BUILDING**
- Scoping the partnership’s potential
- Exploring drivers, expectations and underlying interests
- Embedding principles of equity, transparency and mutual benefit
- Enabling partners to differentiate between their partnership and its projects
- Negotiating a detailed collaboration agreement to underpin the partnership

**REVIEWING & REVISIONING**
- Supporting partners in reviewing added value and effectiveness
- Assisting in revising the collaboration agreement
- Helping partners implement changes needed to improve the partnership
- Guiding partners to plan for sustaining outcomes & moving on

**MANAGING & MAINTAINING**
- Co-creating appropriate governance arrangements
- Helping partners to work through complex internal & external challenges
- Building partner capacities to strengthen and optimise the partnership
- Enabling partners to explore new ways of transforming systems
Those operating in this role can find themselves ‘brokering’ any or all of the following:

- **Ideas**, innovation and imaginative responses to intractable issues
- **Complex relationships** that cross sectoral, cultural and/or geographic boundaries
- **Opportunities** for building partnering capacity – in individuals, organisations and partnerships
- **Evolution** of new collaborative mechanisms and organisational models
- **New approaches** to reviewing partnering effectiveness and added value
Partnership brokers help partners / the partnership to achieve a ‘balance’ between:

‘art’ & ‘science’ ... relationship & goals ... service & leadership...action & reflection... etc.
“My belief is that there are three forces always operating in the world: an activating force (that which is trying to happen); a restraining force (that which can help what is trying to happen by challenging it and making it more robust) and a reconciling force (that helps people to work with these two forces to create something new).

I think it is clear that a partnership broker works as a reconciling force, but what I recognise is that, in this role, I may also have to act as a restraining force and/or an activating force as well.

Knowing in which of these ways to act at any particularly time is an art as well as a science.”

Extract from a partnership broker’s logbook

What do Partnership Brokers Do: An enquiry into Practice
Partnership brokers are often juggling contradictions

<table>
<thead>
<tr>
<th>Supporting / serving</th>
<th>Shaping / directing</th>
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<tbody>
<tr>
<td>Disrupting</td>
<td>Consolidating</td>
</tr>
<tr>
<td>Working from intuitive insights</td>
<td>Working from logical deduction</td>
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<tr>
<td>Unaligned / neutral</td>
<td>Passionate / persistent</td>
</tr>
<tr>
<td>Building a level playing field</td>
<td>Promoting new leadership</td>
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Partnership brokers are often both:

From: Dealing with Paradox – Case Study of Start Network
“I have learned a lot about leadership in partnership brokering. I have sometimes been required to push far ahead of the partners in exploring and creating opportunities that they cannot yet see as individuals or as organisations. This has involved quite a lot of personal risk in that I needed to be visibly seeking, questioning and making mistakes. It feels as if, more than anything else, I have needed courage”
Discussion / Challenge / Q&A
<table>
<thead>
<tr>
<th><strong>Myths / Assumptions</strong> (about partnership brokering in theory)</th>
<th><strong>Realities / Experience</strong> (from partnership brokering in practice)</th>
</tr>
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<tbody>
<tr>
<td>Its all about people skills and relationship-building</td>
<td>It is far more about shaping direction and getting to action</td>
</tr>
<tr>
<td>Having a partnership broker wastes resources and detracts from project delivery</td>
<td>Not having a partnership broker can mean high risk of (potentially very costly) problems to sort out later</td>
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<tr>
<td>Partnership brokers work for agreement</td>
<td>Partnership brokers work for alignment</td>
</tr>
<tr>
<td>Partnerships brokers have a key role in managing conflict and smoothing over differences of view</td>
<td>Partnership brokers help partners to explore and innovate by building on diversity and differences</td>
</tr>
<tr>
<td>Partnership brokers are self-serving and perpetuate partner dependency for their own interests</td>
<td>Partnership brokers should work to a code of ethics in which the principle of making their role redundant is enshrined</td>
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What is the role of partnership brokers in monitoring and evaluating partnerships?
"I tried to bring out the meaning of a partnership and managed to help them explore the benefits where a fully functioning partnership are bigger than simply delivering a project. How the multi-stakeholder and cross-sector engagement could unleash untapped potential and nurture creativity and innovation.

This enabled everyone to see a wider picture as opposed to the narrow focus on 'How many? How much?' that had characterised all the earlier interactions”

Extract from a partnership broker’s logbook
What do Partnership Brokers Do: An enquiry into Practice
ESTIMATING impacts of partnership’s activities

TRACKING activity, contributions and performance

PROJECT focus

EVALUATING PARTNERSHIPS
ESTIMATING impacts of partnership’s activities

TRACKING activity, contributions and performance

ASSESSING partnership effectiveness and efficiency

REVIEWING value of the partnership to the partners

EVALUATING PARTNERSHIPS

PROJECT focus

PARTNERSHIP focus
ESTIMATING impacts of partnership’s activities

TRACKING activity, contributions and performance

ASSESSING partnership effectiveness and efficiency

REVIEWING value of the partnership to the partners

EVALUATING PARTNERSHIPS

ASSESSING broker’s effectiveness and added value

COMPARING brokered and not-brokered partnerships

PROJECT focus

PARTNERSHIP focus

BROKER focus
ESTIMATING impacts of partnership’s activities

TRACKING activity, contributions and performance

Partnership Broker as
ADVISOR

PARTNERSHIP focus

ASSessing partnership effectiveness and efficiency

ASSESSING brokered and not-brokered partnerships

Comparing brokered and not-brokered partnerships

Partnership Broker as
FACILITATOR

PROJECT focus

REVIEWING value of the partnership to the partners

Partnership Broker as
SUBJECT

PARADIGM focus

Comparing partnership to other options

Impact on policy and systems

Partnership Broker as
ADVOCATE

EVALUATING PARTNERSHIPS

Assessing broker’s effectiveness and added value

AsSESSing partnership’s activities

Comparing partnership to other options

Partnership Broker as
SUBJECT

Project focus

Assessing partnership’s activities

Evaluating partnerships

AsSESSing partnership’s activities

Partnership Broker as
SUBJECT

Partnership Broker as
SUBJECT
ESTIMATING impacts of partnership’s activities

TRACKING activity, contributions and performance

EVALUATING PARTNERSHIPS

PROJECT focus

PARADIGM focus

PARTNERSHIP focus

BROKER focus

ASSESSING partnership effectiveness and efficiency

REVIEWING value of the partnership to the partners

COMPARING brokered and not-brokered partnerships

ASSESSING broker’s effectiveness and added value

IMPACT on policy and systems

COMPARING partnership to other options

Evaluating Partnerships

Partnership Broker as ADVISOR

Partnership Broker as ADVOCATE

Partnership Broker as FACILITATOR

Partnership Broker as SUBJECT
Partnership brokers as ‘story tellers’

Start Network case study sequence

Dealing with paradox
Stories and lessons from the first three years of Consortium-building

Power & Politics
The Consortium-building Story Continues

Realities Behind The Rhetoric
Exploring what it takes to deliver the vision
Partnership brokers as ‘participant observers’
Partnership brokers as ‘informants’

The necessity of transformation
Emerging Partnership Lessons from Diverse Contexts

Partnership brokers as ‘subjects’

What do Partnership Brokers Do?
An enquiry into practice
January 2012
Collaborative advantage is strongest when the collaboration:

1. Yields benefits that are more than just a ‘deal’ but creates **living systems that evolve progressively in their possibilities**. Beyond the immediate reasons for forming the relationship, collaboration offers those involved an option on the future by opening new doors and creating unforeseen opportunities.

2. Creates **new value together** rather than simply getting something back for what you put in

3. Is not ‘controlled’ by formal systems but works from a **dense web of interpersonal connections and internal infrastructures** that enhance learning

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**Drawn from:** Rosabeth Moss-Kanter  
Partnerships brokers helping partners to ask: What constitutes ‘value’?

**Added Value**
- Access to new resources
- Innovation
- Quality
- Legitimacy
- More integrated solutions
- Appropriateness
- Effective & efficient implementation
- Scale
- Greater sustainability

**Outcomes** (in addition to project results)
- Meeting individual partner’s drivers / underlying interests
- Changes in mind-sets, behaviours and relationships
- Partners have new capabilities

**Additional benefits**
- Social capital
- Empowerment
- Technical transfer
- Spin off activities
- Wider influence on policy & practice
- System change
- Greater societal stability
- Learning / new knowledge
Reviewing & Revising

**Partnership brokering roles:**

- **Supporting** partners in reviewing added value and effectiveness
- **Assisting** in revising collaboration agreement
- **Helping** partners implement changes needed to improve the partnership
- **Guiding** partners to plan for sustaining outcomes & moving on

**Partnership brokering tasks can include:**

- Agreeing and co-creating review procedures
- Drawing out lessons and capturing information
- Improving efficiency of the partnership
- Exploring added value to partners and unexpected benefits / outcomes
- Brainstorming new ideas /developments
- Making any necessary changes to project or partnering arrangements
- Agreeing what to put into the public domain and how
How does this approach add to our ability to understand and improve partnering?

What issues does this approach raise?

Anything else to explore?
Discussion / Challenge / Q&A
Or for more discussion on partnership brokering or other partnering issues, contact me on:

ros@partnershipbrokers.org

More information about partnership brokering and / or the Partnership Brokers Association please go to:

www.partnershipbrokers.org