

Partnership Brokers Accreditation Scheme

Promoting professionalism and integrity in brokering
multi-sector partnerships for sustainable development



www.partnershipbrokers.org



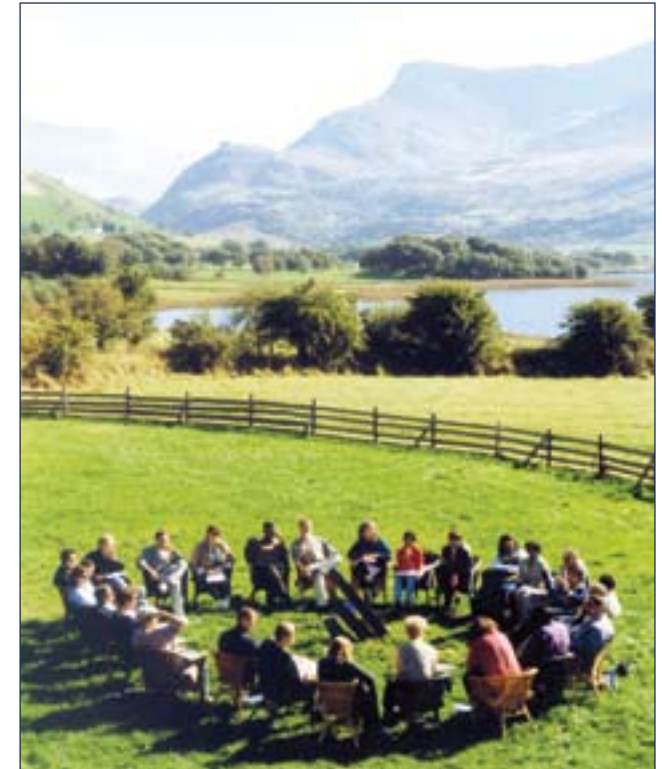
The PBAS Vision

Multi-sector partnerships involve collaboration between organisations from the public sector, business, international agencies and / or civil society. Such partnerships move beyond unilateral actions and conventional contracts by pooling complementary resources and genuinely sharing the risks and benefits in order to achieve sustainable development impact. Partnering approaches are increasingly advocated by leaders in every sector who seek to address intractable problems of poverty, environmental degradation, economic stagnation and / or social exclusion in both developed and developing countries. However, partnering is not necessarily easy and opportunities are often missed or mis-managed without professional support. Many now believe that such partnerships are essential not optional.

The Partnership Brokers Accreditation Scheme (PBAS) trains and accredits professional partnership brokers, and is run by The Partnering Initiative (TPI). PBAS was established in 2003 to create a new profession – that of ‘partnership broker’ – to help ensure that cross-sector partnerships for sustainable

development, whether at strategic or operational levels, are built on strong foundations, function well and maximise their potential for impact. PBAS is based on the premise that partnership brokers operating as skilled facilitators of collaborative action represent a new kind of leadership for the 21st century. It equips individuals to build their partnering skills and the capacity of organisations and partners to become better partners.

As well as creating professional training for partnership brokers, PBAS has already played an influential part in promoting the idea of ‘brokering’ as an important feature in effective, efficient and innovative partnering. An increasing number of organisations in each sector are recognising the value of good brokering. Partnership brokers can be ‘internal’ (ie operating from within one of the partner organisations for the benefit of the partnership as a whole), or ‘external’ (ie operating as independent specialists or working for one of a growing number of intermediary organisations).



A typical retreat location for PBAS

“ There are some basic rules of good partnership brokering. These include building equity, transparency and mutual benefit as core partnering principles as well as supporting partners in working together to co-create solutions to the development challenges being addressed. Partnering is hard work, but with good brokering there can be greater efficiency and effectiveness as well as real and tangible benefits ”

Michael Warner – author *The New Broker* –
Scheme co-founder and current Chair, PBAS
Validation Committee

The role of a partnership broker

The dictionary definition of a broker is that of an active ‘go-between’. The term ‘partnership broker’ was chosen to suggest a role that is more complex / multi-levelled than that of a conventional facilitator or an intermediary. The role of a partnership broker, in the PBAS definition, is closer to that of someone navigating a journey – helping partners to create a map, plan their route and to change direction when necessary.

Partnership brokers may operate as coordinators, animators, innovators or pioneers – depending on the nature of their relationship to the initiating organisation and / or to the partnership. They need a range of skills including: facilitation, interest-based negotiation, communication, mentoring and

monitoring. Their most important attribute is to know what is needed at different stages of the partnering cycle: scoping and relationship-building in the early stages; ensuring good governance and communications are in place once an agreement has been signed; facilitating reviews and revisions when necessary as well as advising partners on how best to ‘institutionalise’ the partnership’s outcomes and move the partnership to closure when the time is right.

The success and influence of PBAS is due to the very high calibre of individuals who have become accredited brokers since the Scheme started and who are now operating as serious change agents in their organisations, sectors and locations.

At some level, good brokering is simply common sense, but many of those who have completed PBAS comment on how much professional competence and confidence the Scheme has provided for them in their partnering work.

“ Partnership brokers essentially operate as process managers, but they also have a behind-the-scenes leadership function. Indeed, brokers can be seen as epitomising a new style of leadership – sometimes characterised as servant leadership – that is particularly suited to the current challenges the world faces. This new style of leadership role is that of catalyst rather than figurehead. Such a role requires vision, persistence and, above all, modesty. ”

Ros Tennyson – author *The Guiding Hand: Brokering Partnerships for Sustainable Development* – Scheme co-founder and current Scheme Director, PBAS

“ As a development practitioner who interacts with players from other sectors in my work everyday, my training as a partnership broker was one of the most practical and useful professional trainings that I have undertaken. PBAS helped me not only to set up new partnerships but also to better manage existing complex relationships across multiple sectors thereby allowing for leverage of a range of resources leading to higher development impact. Given the global trend towards multi sector partnerships for development as an essential mechanism for achieving the UN’s Millennium Development Goals, it feels really important that I am now far better equipped not only to design and promote partnerships but also evaluate their sustainability and their impact on development. ”

PBAS distinction candidate – Cohort 3, and subsequently PBAS mentor

PBAS has 3 distinct levels. Level 1, the brokering skills training, is run globally by TPI and our licensed partners.

	Criteria for Acceptance:	Key Activities:	
Level 1 Brokering Skills Training	<ul style="list-style-type: none"> * Experience of cross-sector partnering for sustainable development * Evidence (academic / professional qualification or written partnership case study or equivalent) that demonstrates ability to combine analytical and practical skills * Endorsement for participation from employer (internal brokers) or from a client (external brokers) 	5-day intensive residential programme that builds: <ul style="list-style-type: none"> * Understanding of the art and science of partnership brokering * Skills in partner assessment, interest-based negotiation, facilitation, reaching agreement, building institutional engagement, reviewing partnerships and managing 'moving on' strategies * Insight into applications of the PBAS principles 	
Level 2 Professional Accreditation	<ul style="list-style-type: none"> * Involvement with on-going / planned partnering activities on behalf of their organisation (internal brokers) or evidence of on-going / planned work with partnership clients (external brokers) * Access to information technology that will support distance learning (access to internet, email, skype or phone) * Achieve a 'pass' at Level 1 	<ul style="list-style-type: none"> * Create a 3-month Action Plan * Undertake a range of brokering tasks with the support of a long-distance 'mentor' * Reflect on activities and record actions and learning in a weekly 'log book' * Produce a final 2,000-word essay on their 'partnership brokering journey' – a reflective narrative summarising learning from their PBAS work 	
Level 3 Advanced Practice	<ul style="list-style-type: none"> * Distinction at Level 2 or endorsement of the PBAS Examiners 	<ul style="list-style-type: none"> * Produce a 5,000 word dissertation – either an innovative / original 'think piece' on brokering or the development of a new tool that will enhance brokering practice * Access to the support of an experienced practitioner as a tutor 	

Assessment Procedures:	Learning Outcomes:
<ul style="list-style-type: none"> * The PBAS training team will evaluate the skills and aptitudes of the participants during the residential course to assess suitability for Level 2 * All candidates who complete Level 1 are awarded a Certificate of Completion 	<ul style="list-style-type: none"> * Ability to undertake pre-partnership assessments; identify potential partners and help organisations to scope partnering projects * Skills in facilitating activities with partners including: resource mapping, outline design, reaching agreement, building governance procedures, reviewing partnership's impacts and value * Confidence in coaching and supporting good partnering behaviour and helping partners to manage communications and other challenges at all stages of the partnering cycle
<ul style="list-style-type: none"> * The log books and essay are both assessed initially by the candidate's mentor * An internal and external examiner review the log books and final papers, together with the comments from mentors, and award a final grade * Candidates who successfully complete Level 2 become professionally accredited Partnership Brokers 	<ul style="list-style-type: none"> * Three months of demonstrable achievement in partnership brokering * The ability to reflect on professional practice and to review strategies and practice in action * Increased understanding of both the critical success factors and the challenges involved in brokering multi-sector partnerships and the role of the broker in managing both
<ul style="list-style-type: none"> * The tutor and internal examiner will undertake an assessment of their participants' dissertation * Candidates who successfully complete Level 3 are awarded a Certificate of Advanced Practice 	<ul style="list-style-type: none"> * Confidence in being capable of focused research, analysis and creative thinking that makes a real contribution to the partnership brokering profession

Selection, assessment and quality assurance:

PBAS is designed to ensure quality and integrity in partnership brokering; we therefore have rigorous selection, assessment and quality assurance processes. The training materials and the training design for Level 1, as well as the assessment procedures for Levels 2 and 3, are subject to an annual review by an external Validation Committee.



Developing a PBAS tool during Level 1. R. Tennyson

The PBAS Track Record

PBAS has trained candidates from every sector including:			
PRIVATE SECTOR	NOT FOR PROFIT	PUBLIC SECTOR	INT. AGENCIES
Accenture	AccountAbility	Australian Centre for International Agricultural Research (ACIAR)	ADB
Alcoa	ActionAid	British Broadcasting Corporation	AUSAID (Australia)
Alcan	Business in the Community	British Council	DFID (UK)
ANZ Bank	CARE International	City of London Corporation	FMO (Netherlands)
BG Group	Earthwatch Institute	New Zealand Department of Conservation	GTZ (Germany)
BHP Billiton	Engender Health	Government of Orissa	IAEA
BP	Environmental Partnership for Sustainable Development	Government of West Bengal	IFAD
Chevron	Fauna & Flora International	India State Urban Development Agency	IFC
Coca-Cola	International Business Leaders Forum	Queensland Government	SNV (Netherlands)
ERM	King Baudouin Foundation	UK Home Office	UNCDF
Nike	Marie Stopes International	US State Dept	UNDP
Philipps International	Mercy Corps		UNFPA
PriceWaterhouseCoopers	New Economics Foundation		UNHCR
Rio Tinto	Save the Children		UNIDO
Sakhalin Energy	Sustainability		USAID (USA)
Shell International	Synergos		World Bank
Thames Water	World Vision		
TOTAL	Youth Business International		
Unilever			
VimpelCom			

...and from many different parts of the world including:

Angola	Bulgaria	Egypt	Haiti	Madagascar	Philippines	Timor Leste	Vietnam
Australia	Cambodia	Ethiopia	Hungary	Malawi	Poland	Togo	Zambia
Austria	Canada	Fiji	India	Mozambique	Romania	Trinidad	
Bangladesh	China	France	Indonesia	Netherlands	Russia	Uganda	
Belgium	Croatia	Gabon	Italy	New Zealand	South Africa	UK	
Bolivia	Czech Rep.	Germany	Jamaica	Nigeria	Spain	USA	
Brazil	Ecuador	Ghana	Kenya	Papua NG	Switzerland	Venezuela	

Assessing impact & keeping ahead

As a key part of assessing the value and reach of PBAS, we are committed to keeping in active contact with the growing network of accredited partnership brokers. We undertake global surveys of their activities to assess the impact of brokering on partnerships for sustainable development in different contexts. We encourage and facilitate opportunities for them to share their experiences as well as their thinking and any new brokering tools / methodologies they have created or adapted on The Partnership Forum. Above all, we invite our 'alumni' to share their brokering challenges so that we can ensure that the PBAS training remains truly 'fit for purpose' in a changing world.

PBAS Founding Organisations



Cohort 18, Oxfordshire. K. Hewett

“ PBAS gave me instant access to many years of learning by others as well as helping me to acquire some very practical skills that I could immediately deploy in my work. Prior to the training, I had been trying to broker a strategic partnership for nearly two years but could not get the potential partners beyond simply agreeing on their shared interest in partnering with each other. During my PBAS professional practice period (Level 2) I employed the concepts and tools of partnership brokering we had been taught and within weeks the partnership arrangement was formalised with the collaboration moving to a completely new level of co-creation. ”

PBAS distinction candidate – Cohort 7, and subsequently PBAS mentor

Since April 2008 the management of PBAS has been handed over to The Partnering Initiative, a global programme of IBLF.

International Business Leaders Forum (IBLF)



The International Business Leaders Forum works with business, governments and civil society to enhance the contribution that companies can make to sustainable development. Founded by HRH The Prince of Wales, we are an independent, not-for-profit organisation currently supported by over 100 of the world's leading businesses. Since 1990, we have worked in over 90 countries. Current areas of work include raising sustainable business standards, improving prospects for enterprise and employment, and enabling companies to contribute to health and human development issues. www.iblf.org

Overseas Development Institute (ODI)



ODI is Britain's leading independent think tank on international development and humanitarian issues. The mission is to inspire and inform policy and practice which lead to the reduction of poverty, the alleviation of suffering and the achievement of sustainable livelihoods in developing countries. We do this by locking together high quality applied research, practical policy advice, and policy-focused dissemination and debate. We work with partners in the public and private sectors, in both developing and developed countries. www.odi.org.uk

PBAS supporting organisations

The International Business Leaders Forum and the Overseas Development Institute would like to acknowledge with gratitude the far-sightedness of GTZ, Nike, Nike Foundation, Rio Tinto and Shell in providing financial support for: the early development phase of PBAS; the provision of bursaries for selected applicants as well as the essential seed funding between 2005-7 for the first wave of Level 1 cohorts run outside the UK (in Australia, Canada, India and Nigeria).

PBAS Principles

Candidates who pass Level 2 of the Scheme are asked to sign (and commit themselves to) a series of good practice principles as a precondition of being awarded accreditation as a partnership broker. The PBAS Principles promote individual integrity and professionalism by requiring all those accredited to:

1. Keep abreast of **new developments** in the theory and practice of brokering successful partnerships for sustainable development.
2. Apply the **most practicable tools** at each stage of the partnering process (giving due acknowledgement to the source of any tools used from elsewhere) and **demonstrate innovation** in the development and application of new tools where appropriate to the situation.
3. Recognise that it is acceptable to pursue the interests of ones own organisation, but that this aim should be exercised by applying brokering skills to the mutual benefit of all parties and to the partnership's goals for sustainable development (as an **internal broker**).
OR
Take every opportunity to build the capacity of the partnership to manage its own affairs, either directly through the partners themselves, or by strengthening local capacity in external brokering, and avoid promoting ones own continuation in a partnering process unless justified and acceptable to all relevant parties (as an **external broker**).
4. Refrain from promoting a partnering process when aware of a **realistic alternative** that would deliver better sustainable development outcomes.
5. Avoid taking actions within a partnering process that might involve **risk** without prior endorsement for these actions from all parties likely to be directly or indirectly impacted.
6. Demonstrate a responsible attitude by raising **concerns of an ethical or legal nature** with partners when necessary.
7. Know ones own **competence limitations** and the circumstances in which it is appropriate to request assistance from others.

MORE INFORMATION

For more information on all aspects of PBAS including dates, locations and costs please go to:
www.partnershipbrokers.org

PBAS is administered by The Partnering Initiative – a global programme of the International Business Leaders Forum.

www.ThePartneringInitiative.org

15-16 Cornwall Terrace,
Regent's Park, London, NW1 4QP
+44 (0)20 7467 3625

PBAS@thepartneringinitiative.org

