

STORIES FROM PRACTICE

CREATED BY PARTNERSHIP BROKERS. PRESENTED BY PBA.



Possibilities and Pitfalls of PRO BONO PARTNERSHIP BROKERING

The skills of partnership brokers are becoming increasingly sought after by many wanting to build or maintain effective partnerships. For external brokers, one of the benefits (also often a requirement) is a monetary fee-for-service. Yet financial gain is only one of the benefits that comes from this work – which may also include new knowledge, new networks and greater visibility or influence. How might these benefits be considered in the context of those providing services in a pro bono capacity? Under what conditions are they more or less important than financial gains? And is there a way the profession of partnership brokering may be able to position the role and value of pro bono partnership brokering in ways that benefit individuals as well as the partnerships they serve? This paper examines these issues, and the ways in which pro bono services may be considered in the context of a mature and evolving partnership brokering profession.

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Possibilities and pitfalls of pro bono partnership brokering

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Contents

Introduction.....	3
An overview of pro bono practice	3
What are the implications for partnership brokers?.....	6
A Personal Reflection	9
Conclusions & Looking Ahead	11

Introduction

A partnership broker is many things: a designer, a problem solver, a facilitator, an evaluator, a coach, a guide, a navigator - and many more. There are perhaps few roles that bring together this diversity of skills under one umbrella, meaning partnership brokers are likely to be sought out for tackling a wide range of challenges. This growing recognition of the skills and value of partnership brokers has helped to foster the increased professionalisation of the field, which in turn is supporting brokers to more clearly and collectively describe what they do, how they do it, and the benefits of their work for others.

The growing recognition and valuing of the skills of partnership brokers has resulted in rising demands for brokering services – as partnerships are designed, implemented, reviewed and scaled up (or wound down). This demand has emerged from a range of places, including public, private and civil society sectors, and in high, middle and low-income settings. Therefore, the *price* for brokering services might be reasonably expected to rise, leaving those with a more limited capacity to pay, without the ability to engage brokers or benefit from their skills and expertise.

Offering pro bono services is a well-established model in a range of industries, particularly legal services. There are a variety of benefits, challenges, enablers and constraints to pro bono work, and for those in a variety of positions: the individual (or individuals) providing pro bono services, their ‘firm’ (if they have one), the recipient of pro bono services (be it an individual or an organization), and even the profession itself.

To date, there have been few examinations of pro bono service provision in the context of partnership brokers (excluding those offering partnering services through legal assistance). What might the benefits and challenges of this model be? Who might stand to benefit and in what ways? How does pro bono service provision influence the work of a partnership broker? What might be the effects on the profession, both positive and negative? How does the very notion of pro bono work intersect with current directions in the field of transformative partnerships?

The prompt to explore pro bono partnership brokering through this article finds its origins in my own experiences in the PBA Accreditation process. The Personal Reflection included in this article describes my pro bono experience more fully, and the insights I have gained from the process. Throughout, the impacts of my role as a pro bono broker have rippled across my experience, as well as among those around me: in good, challenging and sometimes indifferent ways. It was therefore a nudge to consider if, how and why other brokers might choose to engage in pro bono service offerings.

This paper draws on relevant theory and practical experiences in exploring the application of pro bono work for partnership brokers. It is intended as a prompt for those working as partnership brokers to consider if and how a pro bono approach may fit with their practice, and how such offerings align with collective efforts to build strong and meaningful partnerships. Moreover, it attempts to provide useful insights and recommendations for informing other partnership brokers interested in the role and value of pro bono activity.

An overview of pro bono practice

What is meant by ‘pro bono’ practice?

Pro bono is an abbreviated form of the Latin phrase *pro bono publico* – “for the public good”. Pro bono services are those that are provided free and without the expectation of commercial gain. The concept of pro bono service provision has been made popular through legal services, where advice and representation are provided free to clients who do not have the capacity to pay, or who are given a discounted rate. While pro bono legal services have a long history, a structured and formalised approach to pro bono services in

Australia (where much of my work is based) has been more recent – beginning with free assistance to central local courts in the late 1960s, and expanding over subsequent decades, with a formalised Pro Bono Centre now marking 20 years of activity.¹ Pro bono services are now widely celebrated as part of legal practice in Australia, including as part of undergraduate training.

In concept and practice, pro bono work shares connections with the broader field of volunteering. And while volunteering may be undertaken by any individual, in any area, and at any stage in life, there are particular forms of volunteering that are of relevance to those working in a profession – including those working as partnership brokers.

In their recent article, Dempsey-Brench and Shantz² describe a range of different volunteering models – see Figure 1. These models broadly relate to workers within organizations providing volunteering services. Within these models, *skills-based* volunteering is described as a “strategically driven activity that involves employees donating job-related skills and acquiring or developing skills through voluntary contributions”. In contrast to more generalised volunteering practices, skills-based volunteering focuses on donating a *specific* set of skills to a particular organization or setting: it is therefore a highly relevant lens through which to view pro bono partnership brokering services.

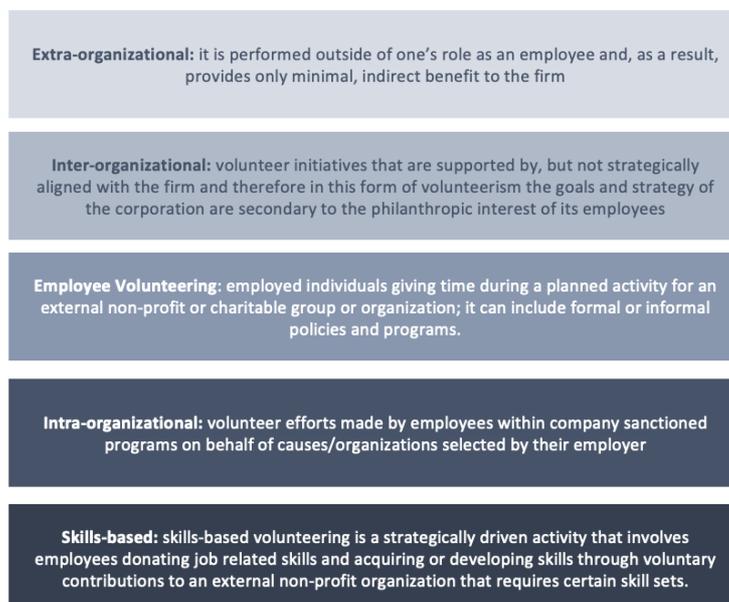


Figure 1: Volunteering Definitions (from Dempsey-Brench & Shantz, 2021)

What are the benefits of skills-based volunteering?

The benefits of skills-based volunteering may be understood from multiple perspectives: from the volunteer; the receiving individual, organization or group; and the volunteer’s own organization (if in existence).

Perhaps most attention has been given to the benefits for those volunteering their skills. These typically include new networks and relationships; a sense of belonging and community; enhanced or sometimes new

¹ Australian Pro Bono Centre <https://www.probonocentre.org.au/information-on-pro-bono/definition/>

² Dempsey-Brench K, Shantz A. *Skills-based volunteering: A systematic literature review of the intersection of skills and employee volunteering*. Human Resource Management Review (article in press) 2021.

knowledge and skills; and an overall improvement to psychological wellbeing.³⁴ In a recent model put forward by Tierney et al., these benefits contribute to changes within individuals in terms of how they see themselves, how they see their place in the world, and how they feel that others perceive them. Collectively, this leads to either validation or modification of their individual identities and greater sense of self.

For those receiving the skills or services of a volunteer, the immediate benefits are a greater ability and capacity to achieve their goals and objectives.⁵ Sometimes this involves an element of internal capacity building (i.e., the volunteer imparts their skills and knowledge to increase the capacity of others), while at other times these benefits may be more transactional in nature. Over time, and with a diversity of skill-based volunteering, recipient organizations may benefit and change in significant ways: in what they do, how they work, where they work, and the outcomes they deliver for their stakeholders.

Often, skill-based volunteers are in current employment with an organization, which can bring benefits to these 'home' institutions.⁶ Volunteers typically bring new knowledge and skills gained from their volunteering work 'back' to their home organizations. Moreover, new networks, connections and relationships can benefit organizations in multiple ways, including through opening new opportunities for business, greater impact of their own programs or policies, and gaining increased visibility or exposure to different market opportunities. At the same time, organizations with Corporate Social Responsibility (CSR) policies and initiatives, often benefit from the work of volunteers – particularly when these volunteering roles are included as targets or goals within CSR initiatives.

What motivates someone to volunteer their skills and services?

Perhaps the most widely adopted model for understanding and describing volunteering motivations is that proposed (and adapted) by Clarey et al. in 1998.⁷ This model describes 6 key 'functional' factors that may motivate individuals to volunteer:

1. To express and demonstrate their altruistic values
2. To gain new knowledge and understanding (as described above)
3. To undertake personal growth and development
4. To develop new social relationships
5. To protect themselves from negative feelings and emotions
6. To gain new professional skills, and/or to enhance their own careers.

For skills-based volunteers operating within an organization, there may also be a coercive element at play: whereby individuals are *forced* to volunteer in order for the organization to achieve specific goals and targets. Of note, available research does not suggest that being forced to volunteer is associated with any negative consequences.⁸

³ Mao L, Normand C. *The effect of volunteering on employment: Evidence from the Irish Longitudinal Study on Ageing (TILDA)*. The Journal of the Economics of Ageing. 2022;(21):100350

⁴ Tierney et al. *The role of volunteering in supporting well-being: What might this mean for social prescribing? A best-fit framework synthesis of qualitative research*. Health Soc Care Community. 2022;30:e325-346

⁵ Dempsey-Brench K, Shantz A. *Skills-based volunteering: A systematic literature review of the intersection of skills and employee volunteering*. Human Resource Management Review (article in press) 2021.

⁶ Ibid

⁷ Clarey EG et al. *Understanding and assessing the motivations of volunteers: a functional approach*. J Pers Soc Psychol. 1998; 74(6):1516-30.

⁸ Zappala G., and McLaren, J. *A functional approach to employee volunteering: An exploratory study*. Australian Journal on Volunteering. 2004;9(1);41-54

What are the challenges or barriers to skills-based volunteering?

While benefits from skills-based volunteering are clear, there are a range of challenges that may be encountered.

For the volunteer, there is a practical need to allocate time and resources to the volunteering process. For those working in organizations, these resources need to be identified and agreed as they have implications for others operating in that context, such as other team members and dependent departments. For those who are not operating in an organizational setting (e.g., independent consultants), careful planning needs to be taken to ensure necessary time and financial resources are available and stable for the volunteering period.

Receiving organizations also need to consider the challenges associated with working with a volunteer. Professional development of the volunteer can sometimes take precedence over the organization's own goals and needs. In addition, some volunteer assignments (not typically those that are skills-based) can result in additional work, such as supervising and training volunteers, engaging other staff and teams, and undertaking health, safety and risk assessments. All can detract from the core focus of the organization: leaving some to question if 'free-services' are sometimes more costly.

Beyond the very real practical challenges to skills-based volunteering, are our own attitudes, beliefs, and ways of talking about skills-based volunteering and pro bono work, which can be impediments to engaging in pro-bono work. The dominant language around volunteering and 'capacity to pay' inevitably leads to considerations of price: particularly for those interested in or needing to quantify in-kind (i.e., unpaid or volunteered) services. Moreover, many of our professional ways of working (e.g., workplans, budgets, resource models) seek to monetize *all* types of contributions – effectively putting a price on what our services are worth. For some, this becomes a highly personalised judgment of what *they* are worth as people: indeed, research suggests that some employees donating their skills through volunteering are fearful that without reimbursement, their skills are 'cheapened'.⁹

These mindsets have significant effects on pro bono work: on how it is spoken about, how it is considered, and therefore, on *who* decides to volunteer. For some, it might be that they are able to see the benefits (for themselves and/or others) as outweighing the 'costs'. For others, a sense of responsibility and civic duty are likely driving factors. Others still might feel they have little choice when an employer requires some level of pro bono role. While these effects will be felt differently in different contexts, for partnership brokers, pro bono services have some specific considerations that are worth exploring.

What are the implications for partnership brokers?

As noted, partnership brokers bring a variety of highly prized skills, which are valued by those working in a range of settings including public, private and civil society sectors. For those without the capacity to pay (or to pay at market rates), pro bono service models offer opportunities that can benefit the recipient organization, as well as the volunteer, their organization and the profession more broadly. And in delivering or engaging in pro bono services, there are a range of considerations that are worthy of exploration.

The first is **how the benefits of pro bono services are positioned or described** to those delivering skill-based volunteering – particularly acknowledging the diverse drivers and motivations of partnership brokers. Altruism and humanitarian values are noted as key factors that motivate an individual to volunteer their

⁹ Steimel S. *Skills-based volunteering as both work and not work: A tension-centered examination of constructions of "volunteer"*. VOLUNTAS,29(1)(2018),133-143

skills and services. But they are only one factor for skill-based volunteers, with professional and career benefits just as (and sometimes more) important as values-based motivations.

The experiences of those who have worked in pro bono capacities, testify to how pro bono positioning can shift the nature of the relationships and the nature of engagements, including for partnership brokers. The acknowledgement of pro bono services, and respect for such offerings, can bring an openness to an engagement: allowing new ideas to be explored, different techniques trialled, and learning to be shared. For some, this will stand in contrast to fee-for-service engagements, that may have more limited room for exploration or innovation. For an inquisitive, curious and improvement-oriented broker, these can be significant rewards that advance both a partnership, and the practice of a broker. Effectively communicating the benefits of this way of working may require us to re-think the language we use around pro-bono services to more effectively convey the freedom, adventure, and growth that can come from these types of engagements.

These benefits may not be readily apparent to those working in brokering roles. How could these types of professional and career benefits be revealed and communicated to partnership brokers? Are there a subset of brokers to whom these benefits would be of more or lesser appeal? What language and approaches are needed to effectively convey the benefits, importance and need for pro bono partnership brokering services? Indeed, what might motivate *you* as a partnership broker to volunteer *your* skills and expertise?

The second consideration also relates to the benefits of pro bono services, yet has a more intentional focus on the **mutual benefits** that can result from pro bono service provision. For example, some partnership brokers may have a strong professional motivation for a pro bono engagement to help them build new networks, relationships and connections. Being visible, heard, known and respected may therefore be important outcomes for the broker from a pro-bono engagement. Yet the pathways to building and expanding these networks and connections (e.g. through facilitating large and complex discussions, presenting work to many different audiences, or authoring publications to be circulated to wide and diverse readers), isn't what all partnerships need. In contrast, some partnerships might be seeking more 'invisible' support, such planning partnership directions, negotiating delicate discussions, or observing and providing critical feedback on partnership practices.

Exploring what each party is seeking to gain from a pro-bono engagement is therefore critical: what does a partner or partnership need? What does a broker need? Is there sufficient alignment between these needs, and is this the right engagement for both parties to fulfil their needs and obligations? Clearly and purposefully communicating and aligning on these mutual benefits at the commencement and throughout a pro bono engagement, is therefore an important step.

The third, and related consideration, is **the scope of the pro bono engagement**. The work of partnerships can be fluid and evolving, where changes in the partnership and/or its context can have significant implications for what happens next. Under these conditions, it's unlikely that the best laid plans will go unchanged or without modification. For a pro bono provider, this can create significant challenges as the terms of an initial engagement shift and change, potentially eroding the value both the partnership, and the broker are able to draw from the experience. At such times, revisiting agreements made is likely a useful step: and to do so transparently, and in service of the partnership. In practice, this doesn't mean that the needs and interest of the broker go un-discussed: rather, if pro bono services are unlikely to help meet the new needs of the partnership, then it is time for change. In keeping with the principles of good partnership practice, knowing when to move on is critical for all brokers, including those that are operating in a pro bono capacity.

The fourth consideration relates less to the pro bono broker, or the recipient partnership or organization: rather, **it is a consideration about the profession of partnership brokering itself**, and the essence of what

the profession is built on. There is little doubt in my mind that pro bono services are a necessary part of a socially responsible profession, which includes partnership brokers. The ‘collectiveness’ of professional alliances can indeed be driven by pro bono services: where members offering pro bono services develop a shared sense of self and identity with other brokers. In short, a stronger sense of community belonging. This is consistent with existing literature on the value of *collective* volunteering: moving from a sole focus on individuals, to a joint sense of community that comes from volunteering with others.¹⁰ The benefits of this to the individual and the profession are potentially significant: stronger networks; greater knowledge sharing; improved practice; enhanced ability to respond to change; improved professional standing and recognition; greater overall remuneration; and ultimately, better partnerships and partnership outcomes. Finding ways that associations such as PBA may help to convene pro bono communities might therefore be an important step in advancing the role and place of pro bono work within the broader professional agenda of partnership brokers.

The above considerations are largely made in the context of pro bono partnership brokering services, particularly when thinking about those operating as external partnership brokers. They therefore do not specifically consider *pro bono partnering*; where partners engage in partnerships without the expectation of financial remuneration. While some of the roles such partners might play could be considered ‘brokering’, what is important is that these partners see themselves as *part of the partnership* they are co-creating. Viewed in this way, the risks, costs and benefits of the partnership area shared – making the notion of a ‘donor’ set of services redundant, or at least, out of place.

In contrast, the considerations made here will likely have greatest resonance in the context of partnership brokers operating as facilitators or supporters of a partnership, rather than as members or partners within a partnership itself. And it is in these contexts, that the provision of services becomes an important object of focus – including how and when such services might be made without the expectation of financial remuneration. This is important, as the outcomes a partnership creates, may not be shared by those in brokering roles: which means the consideration of benefits for the pro bono broker, particularly the non-financial benefits described here, require some attention.

¹⁰ Gray D, and Stevenson C. How can ‘we’ help? Exploring the role of shared social identity in the experiences and benefits of volunteering. *J Community Appl Soc Psychol* .2020;30:341–353

A Personal Reflection

“And what do you want to be when you grow up?” Many of us can probably remember being asked this very question when we were young: perhaps by an aunt, a neighbour, or a teacher. Doctor, lawyer, plumber, artist, journalist, diplomat, spy – these were all words that at one point came out of my mouth (the latter of which I’m still not giving up on).

But not once, did I say “partnership broker”.

There are good reasons for it, not least that the profession of partnership brokering didn’t exist when I was young. But even if it did, it would have had some stiff competition from the worlds of court rooms, breaking news stories, or international espionage. These were identifiable, recognisable, respected and understood careers, for which clearly marked pathways had been carved out by all those who had come before. They also were easily pointed to by those around me (and perhaps you too) as worthy and worthwhile pursuits.

In contrast, the pathways to partnership brokering are likely a bit more torturous – a few more twists and turns, as we explore a range of possible and alternative realities, before somehow finding our way to the world of partnership brokering. Once there, looking under the hood of what a partnership broker actually is, starts to reveal the skills and competencies of what it means to be an effective broker: a designer, a coach, a facilitator, an evaluator, a confidant, a critical friend, a negotiator, a diplomat, a researcher and fact finder... the list goes on.

These are critical skills, both in life and in helping people and organisations work better together. Those who possess these skills seem to be highly sought after by those who find working in partnership challenging (aka nearly everyone). Which means there’s a willingness to pay for these services – and that willingness is likely to continue to grow.

I started my PBA Accreditation journey viewing the experience as a *learning* opportunity – a chance to consolidate skills gained from across my professional career (no, not from any espionage unfortunately), and to learn some new ones on the way. And so, there was a certain focus to my approach: I wanted space and time to think, experiment, and learn. I was seeking a chance to connect with others, expand my relationships, and dig into a different content domain.

Some of you might be independent contractors – as I am – operating on a fee-for-service basis. If you are, you’ll appreciate that the idea that your own personal and professional learning, exploration and experimentation don’t feature highly on the list of what your potential clients would be willing to pay for.

Which means if you want to extend yourself, you’re likely to be the one to foot the bill.

As I reflect on my own pro bono experience in the context of this PBA Accreditation, there is much that resonates with me about the theory and practice of skills-based volunteering described in this paper. My motivations were in part self-interested (i.e., the benefits I was going to gain from the work), which included new skills, new relationships, a chance to extend my abilities, and the attached benefits that come from a recognised professional credential. I was seeking an experience untethered by the usual contractual relationships that come with a standard consultancy engagement – an experience that allowed for growth, experimentation and learning.

There is no doubt that I have gained these experiences over the last four months. But they have required certain adaptations to be made on my part. The work has shifted and changed, requiring more investment than I originally conceived. The task of regularly reflecting and logging insights and experiences has been more challenging than I had first expected, and the benefits I have gained have sometimes been different to those I had first imagined.

What I have learned is that for pro bono work to exist as an option for partnership brokers it needs to have clear and mutual benefits for all involved – the broker, as well as those benefiting from brokering services. These

benefits need to be of sufficient value (note, not price) that all parties are willing to trade something for them. For me, the trade was in part time and money; for those I was working with, it was a willingness to test something new and take risks in different ways. And all of this was held together by a recognition that our mutual benefits both contributed to a stronger, more effective, and more inclusive social enterprise sector (the content domain of my pro bono work).

Working in a pro bono capacity is not without challenges, yet the rewards can be significant. I encourage all partnership brokers to consider how this mode of engagement might fit with their goals and of those around them: for it might just be a pathway to new insights, better practice, and more fulfilling partnerships for us all.

Conclusions & Looking Ahead

Partnership brokering is fast becoming a profession widely regarded for the skills and perspectives of its people. This brings authority, legitimacy and credibility to the field, and to those who work within it. Yet as the professionalisation of partnership brokering increases, is it at risk of becoming *overly* standardised and regulated: crowding out opportunities for adaptation and evolution? And could pro bono service provision be one way that a spirit of exploration, curiosity and adventure be nurtured? Working with partners without the expectation of commercial gain can indeed open up new ways of thinking and doing. It can free people from the traditional constraints that they work within, and allow new connections, ideas and horizons to be discovered. It is not without trade-offs: in time, money and opportunities. Yet perhaps it is part of a mature and evolving profession that recognises mutual benefits and a spirit of reciprocity, and which is sufficiently reflective to know when and how to engage in it. For those seeking ways to grow, and support others to do the same, pro bono services may therefore provide one important pathway for change.



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