

The Beauty of Institutionalising

Partnership Brokering in a Faith-based, Humanitarian Organisation



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1. Summary

This paper was written as part of my formal Accreditation process with the Partnership brokers Association (PBA).¹

The first section describes my organisation's journey to date in institutionalising the role of the partnership broker. It also highlights some of the successes achieved, as well as some of the challenges encountered during this process.

The second section examines the institutionalisation of the partnership brokering role from two perspectives: an organisational analysis perspective on the one hand, and a systems behaviour change and design thinking perspective on the other. To this end, an analysis of the organisation was first undertaken based on its self-understanding as a principled, faith-based actor committed to localisation and locally led action. This analysis drew on previous surveys, workshops and internal reflections and was informed by the conceptual approaches used in the project.²

On this basis, a possible application of the Marvin Weisbord's Six-Box Model combined with Kurt Lewin's Force Field Analysis was developed and the approaches developed by the internal partnership broker for the organisation, drawing on design thinking and behavioural systems, were examined.

2. Introduction

This paper is a reflection on a journey based on practical experience and the upcoming challenges in the trajectory of introducing the Partnership Brokering (PB) role into the humanitarian organisation for which I am working. It may also serve as an element for institutional learning, striving towards equitable, collaborative partnerships as a foundation for effective, locally led humanitarian action.

When I joined my organisation in 2007, it worked with local and national partners as well as international partners and implemented projects through its own teams. Since then, it has undergone a significant transformation: it now works mainly with local and national partners, some Global South international partners and with a limited number of international partners – either because of their specific expertise or because access to funding through international consortia is easier in certain contexts or with particular donors. The organisation's direct implementation of project funds is now limited to specific service provision (such as cash assistance framework contracts etc.).

As a faith-based humanitarian actor working predominantly with local and national partners, the organisation had embraced the localisation agenda even before it was labelled as such. It was among the first Charter for Change (C4C) signatories and is actively engaged in working groups at both the German and international levels. The organisation had first piloted, and is now mainstreaming, locally led approaches - such as supporting community-led response, mutual aid, community-led anticipatory action, local leadership and locally led funding mechanisms.

When my current position was created in 2023, it became clear that the downside of localisation was that the added value of an international organisation was no longer self-evident. This, combined with the rightful claims of local and national actors for true empowerment, made it necessary for the organisation to more clearly define its roles. It also required articulation how genuinely locally led and locally owned humanitarian actions could move from pilot phase to mainstreaming and full integration into organisational processes and how equitable, collaborative partnerships with local and national actors should look in practice.

¹ www.partnershipbrokers.org

² This work was not part of the project itself

The organisation primarily acts as a partnership broker at the interface between local/national/international partners, communities, donors, networks/alliances and the diverse actors within the humanitarian system.

I also act as an internal partnership broker. My tasks include facilitating partnership workshops, brokering the setup and review of consortia and proposing and negotiating the terms of consortium collaboration agreements. I facilitate and deliver workshops supporting both vertical and horizontal learning on partnership, partner accompaniment, and the role of staff within the brokering process. I also find myself challenging the organisation's current ways of working and advocate for change as well as for the consistent upholding of partnering principles. I broker and mediate between divergent interests - for example, between project / programme priorities and ethical / equitable partnering. In addition, I coach and advise colleagues on partnering and partnership brokering issues, so that they can better fulfil their own partnership brokering roles.

3. Introducing partnership brokering into the organization

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In 2023 and early 2024, an adapted version of the **Power Awareness Tool**ⁱ was applied throughout the partnering and project cycle with local and national partner organisations, representing approximately 25% of all such partners across all regions. These partners were suggested by offices and programme colleagues. Key decisions across both cycles were agreed, validated, and further developed from one workshop to the next. Then, each organisation individually assessed how its involvement in decision-making with THE organisation, scored its desired level of involvement for the future, and provided concrete recommendations. Overall, the variance in scores across partners and regions was relatively high. Partners wished for joint decision-making across almost all categories. In areas such as risk sharing, capacity strengthening, visibility, and complaints mechanisms, they preferred shared responsibility, rather than taking the decisions independently. Alongside these recommendations, it became evident that THE organisation had not engaged in thorough partnering discussions with most partners, and there was a widespread wish for deeper dialogue.

Further discussions, including those held with offices abroad, highlighted that working within consortia and clearly identifying THE organisation's added value in partnership settings - especially in the context of localisation - were critical both for partner relationships and for the organisation's own understanding of its roles across diverse contexts.

During 2023 and 2024, **reflections on the roles of intermediaries** took place both within external working groups and networks as well as internally, through consultation with local and national partners, office directors, and senior central office management. Tools such as "the nine roles intermediaries can play"ⁱⁱⁱ were adapted to describe intermediary roles for The organisation. Following my participation in a Partnership Brokering training in 2024, it became clear that equitable, collaborative partnerships - both bilateral and within consortia - needed to follow a thorough and structured process. Therefore, the anticipated policy on "our roles as intermediary" was expanded to include the partnership brokering role. High-level discussions within The organisation led to a consensus on three major roles: humanitarian expert, intermediary, and partnership broker.

After the policy was drafted—bringing together workshop outcomes and internal reflections—approximately four feedback loops were conducted, drawing on perspectives from different levels and locations within the organisation. For the first time, and with the approval of senior management, partner organisations formed a local and national partner sounding board comprising eleven partners from all regions. These members were proposed by offices as well as identified during workshops and bilateral meetings, and were invited to provide further input and feedback. The final version of the **"roles as international humanitarian actor" policy**ⁱⁱⁱ was approved and published in November 2024.

The intended next step was to describe the **roll-out of the policy in the form of guidance**, with the aim of enabling a streamlined approach across The organisation and with partners.

The anticipated steps were as follows:

- A. Development and testing of the methodology
- B. Workshops with Regional Offices and their respective (multi-)country offices, or with country offices where no Regional Office existed
- C. Anonymised global partner survey
- D. Joint analysis and action planning at the office abroad level
- E. Dissemination, assessment, and action planning at the central office
- F. Integration into strategies and resource planning
- G. Consolidation and incorporation into the organisation's 2026+ strategy
- H. Monitoring and evaluation

The internal feedback group and partner sounding board provided input and feedback on the guidance^{iv}. The sounding board focused in particular on the proposed process steps, the detailed description of roles, and the partner survey questionnaire, which also included a partnership health check.

The **partner survey** was conducted, and the workshop methodology for internal regional office dialogue was initially tested in one region and subsequently applied in an adapted form in another. The main outcomes of the **partner survey regarding the partnership brokering** role are summarised as follows:

- A. Strengthening The organisation's PB identity and visibility
 - Clarify and communicate the partnership broker role and services to all partners.
 - Standardise practices for brokering across the partnership cycle.
- B. Deepening and broadening PB activities
 - Ensure that tools, feedback mechanisms, and support for partnership dialogue are available to all partners, not just some.
 - Extend brokering expertise beyond organisational partners to include community groups, government, and other stakeholders.
- C. Shifting intentionally to local leadership
 - Prioritise PB methods that centre local actors in decision-making.
 - Facilitate power-sharing and co-leadership models in consortia and partnerships.
- D. Investing in capacity development for PB
 - Provide partners and THE organisation's staff with training, tools, and coaching on partnership principles, feedback, and facilitation.
- E. Facilitating cross-sector and context-sensitive partnerships
 - Pay particular attention to context, adapting partnership models to fit specific environments and stakeholders.
 - Enable knowledge exchange and joint learning across a diverse range of actors.

Interpreting the **partnership health check** from a PB perspective led to some preliminary conclusions: The PB role should shift from that of a facilitator to that of a genuine agent, co-creator, and advocate for equitable, sustainable, and locally led partnerships and consortia. PB is not just about relationships - it is about sharing power, joint leadership, efficient structures, and community-based ownership, using practical tools, flexible approaches, and a commitment to adapt governance to partners' realities.

A lessons learned survey on consortia was conducted across eight consortia in different countries. For each consortium all participating organisations were invited to respond to a survey, with one questionnaire response per organisation. Overall, collaboration was rated positively, and partners—particularly local/national actors—identified substantial value in joint work. Collaboration within consortia benefited greatly from transparency, shared ownership, balanced power, and open communication. Strengthening both structural and relational elements was identified as essential to make consortia more equitable, effective, and sustainable. From a PB institutionalisation perspective this implied the need to formalise PB role across offices, integrate PB steps into SOPs and consortia guidelines, to resource PB with

budget, training, tools and to create PB-led reflection and governance mechanisms in close collaboration with all partners.

Two internal workshops brought together regional teams (regional offices and their related (multi-)country offices) to collectively develop a shared vision on key strategic aspects, clarify THE organisation's added value and define its role and impact in local contexts. Through a mix of plenary discussions, the exchange of good practices, scenario-based work, and practical group sessions, the workshops focused on practical approaches to supporting partners throughout the partnering cycle, structuring effective and regular dialogue, and clarifying roles across different office types.

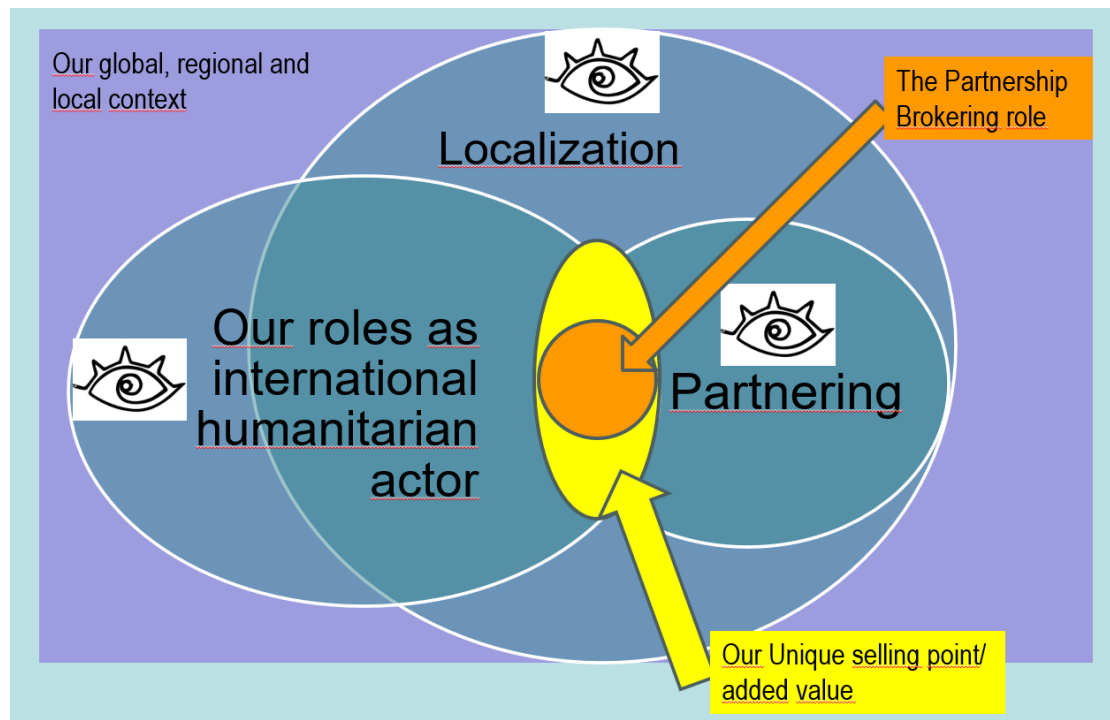
From a methodological perspective, it was essential first to address topics such as equitable partnership (partnering steps, risk sharing, due diligence, consortia, partner accompaniment versus project accompaniment, the power awareness tool) as well as localisation (the organisation's vision, key performance indicators developed with partner organisations, and the four locally led and owned scenarios on which the organisation will focus). This common grounding was necessary before engaging in discussions on organisational roles (as outlined in the roll-out guidance) and the added value that each office contributed to partnerships. As the partnership brokering role was the most recent—and least familiar—role, and appeared last in the provided templates, the exercise had not yet been completed at the time of writing; only preliminary conclusions had been drawn: although THE organisation was widely recognised by partners for its equitable partnerships and its collaborative approach, there remained a need for it to more intentionally create and sustain an environment for effective, adaptable, and principle-based collaboration. Opportunities for further improvement were identified in selecting appropriate partnership models, mediating among a wider range of actors, systematically collecting and using partnership feedback, mapping partnerships, and strengthening coordination with other stakeholders.

The journey towards institutionalisation of the PB role within THE organization has not yet been concluded. Consequently, the reflections presented in the upcoming chapter will provide more food for thoughts.

4. Institutionalising the Partnership Brokering Role: Insights from Organisational and Systemic Change Perspectives

While it is important to reflect on the role of an internal partnership broker as an individual, together with the specific challenges and supportive factors within the organisation, the introduction of the PB role at an institutional level clearly takes on the features of organisational development. This raises the question of how existing systems can be challenged and influenced in ways that favour and enable the PB role within, and on behalf of the organisation. Accordingly, two analytical perspectives - organisational and system change - are applied, drawing on relevant theories and relating them to personal experience as an internal PB. This experience includes responsibility for drafting and introducing policies, SOPs, and guidance on equitable partnership, as well as defining the organisation's roles and its vision and approaches for localisation.

The following figure illustrates how, at a conceptual level, the question of THE organisation's added value is approached by interlinking these three areas. Partnership brokering thus emerges as the role required to actively and systematically connect these distinct domains.



4.1. Analysing an Organization's "Readiness" for Institutionalizing the PB Role

Conceptual Foundation:

Kurt Lewin's force field analysis^v is used here to shed light on the enabling and hindering forces shaping institutional change. This approach involves weighing each force and drawing actions aimed at strengthening enabling forces and weakening the hindering ones.

To categorise and interpret these forces, the analysis follows Marvin Weisbord's 6-Box Model. This model enables the examination of a wide range of institutional aspects, including both visible (such as written policies and explicit statements) and unspoken layers (such as assumptions and underlying beliefs). Leadership sits at the core of organisational transformation, while the remaining elements—purpose, structure, relationships, rewards and helpful mechanisms—must function in relation to the external environment, including context and feedback. Although the model is typically applied to whole-organisation diagnosis, its components are also useful for classifying enabling and hindering forces for the institutionalisation of the Partnership Brokering (PB) role.

Steps Undertaken:

This analysis is grounded in The organisation's values, vision, commitments, and approaches as a faith-based humanitarian actor. The organisation operates with a clear localisation and systems change agenda, within the broader context of humanitarian reform, financial constraints and decentralisation. Drawing on survey results, organisational policies and guidance, workshop findings, and internal reflections conducted by the internal Partnership Broker from 2023 to 2025. A Force Field Analysis based on Kurt Lewin's framework is conducted using Weisbord's Six-Box Model. This process includes the development of reflective questions, designed both for The organisation itself and for other organisations with a similar profile seeking to institutionalise the Partnership Brokering role.

Reflection 1: Application of Weisbord' Six-Box Model with Kurt Lewin's Force Field Analysis and emerging reflective questions

The detailed analysis based on Weisbord's Six-Box Model - adding favourable and hindering forces and including their respective weighting, together with three reflective self-analysis questions for each category - is presented in Annex 1. A summary of the reflective questions that emerged during the analytical process is provided below:

A. Purpose

- How well does the organisation's mission and strategy reflect a commitment to partnership brokering across all stakeholder groups (local partners, donors, communities, etc.)?
- In what concrete ways is the partnership brokering role shaping decision-making, resource allocation, and project design?

B. Structure

- Are our internal structures and decision-making processes designed to enable meaningful engagement and co-leadership between all partnership actors?
- How well do we involve local and national partners, international agencies, and communities in co-designing, implementing, and evaluating projects and programmes?

C. Relationships

- How effectively do we bridge silos and build trust across diverse groups and levels (offices, partners, communities, donors)?
- In what ways does the organisation create safe and open spaces for dialogue, conflict resolution, and honest feedback among all stakeholders?

D. Rewards

- Is partnership brokering work valued and formally recognised within organisational reward and accountability systems?
- Are staff, partners, and other stakeholders acknowledged for successfully brokering and sustaining equitable, collaborative relationships?

E. Helpful mechanisms

- Do we have user-friendly tools, policies, and feedback mechanisms to support the brokering of complex multi-stakeholder collaborations?
- How do our technical systems ensure transparency, trust, and information flow between the organisation, partners, donors, and communities?

F. Leadership

- How actively do leaders model and advocate for partnership brokering within and beyond the organisation?
- Are leaders prepared to mediate and balance the needs, interests, and power dynamics between the organisation, partners, donors, and communities?

4.2. How to influence change in an organization – from a system's change perspective

Conceptual Foundation:

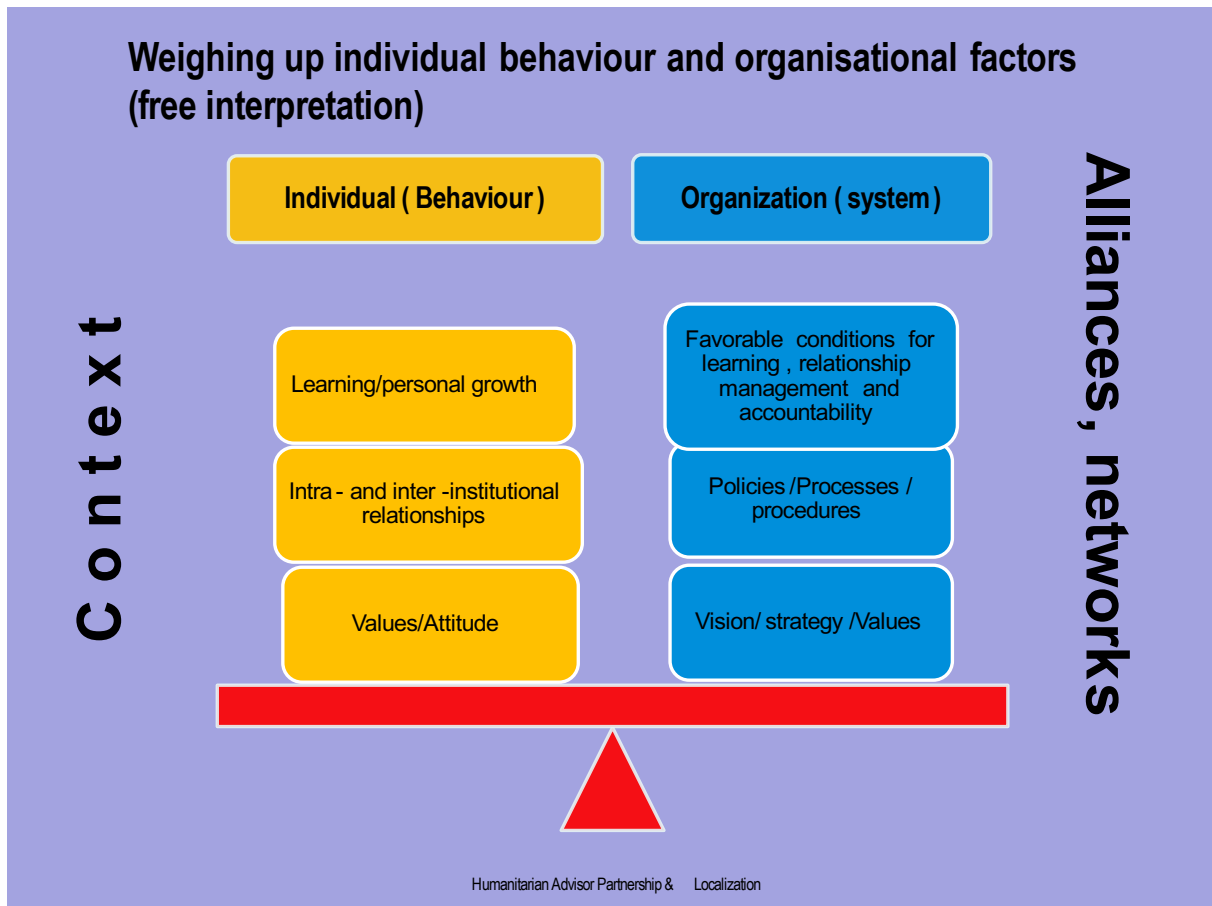
A range of approaches and studies examining the interlinkages between behavioural change and systems change are explored. particular emphasis was placed on **The "Pathways" model**^{vi} and on **"Integrating behavioural science and systems thinking through a design thinking structure"**^{vii}.

Steps Undertaken:

As in the previous exercise, the organisation's values, policies and operating context were related to survey results, organisational policies and guidance, workshop findings, and internal reflections undertaken by the internal Partnership Broker between 2023 and 2025. These inputs were then processed and analysed using both the Pathways model and the above-mentioned approach that integrates behavioural science and systems thinking through a design thinking framework.

Reflection 1: Applying the pathways and behavioural-system change perspective on The organisation's approach to balance between behaviour and systems change

The following diagram, developed through a combination of literature review and personal reflection, has proven useful for conceptualising behaviours - both those that shape or develop individuals and those that shape, enable or develop the organisation. This visualisation and the related reflections are now further enriched by the conceptual approaches and serve as a practical basis for internal reflection (for the full interpretation, please see Annex 2):



A. (Individual) Behaviour side:

- Values/attitudes:
Attitude is a precursor to behaviour. Without value alignment, localisation and equitable, collaborative partnerships remains rhetorical rather than lived. Therefore, staff should adopt an equity-driven, relationship-centred mindset that prioritises humility, transparency, shared leadership, and partner empowerment over compliance and control.
- Intra- and Inter-institutional Relationships:
Partnerships break down or thrive primarily at the relational level. Consistency here enables systemic equity. Therefore, individuals and managers should cultivate equitable, trust-based relationships by listening deeply, sharing decision space, addressing tensions openly, and prioritising collaborative stewardship over hierarchical task delivery.
- Learning / Personal Growth:
Localisation and equitable partnerships require internal transformation; individuals must grow into PB roles that are relational, adaptive, and reflective. Therefore, Individuals should develop power literacy, strengthening facilitation and brokering skills, practise continuous reflexive learning, and become comfortable working amid ambiguity and tension.

B. Organisational System Side

- Vision / Strategy / Values:

Behavioural change scales only when supported by strategic clarity and shared purpose. Therefore, organisational strategy must explicitly embed local leadership, equitable collaboration, and partnership brokering as core pillars, aligning all strategic documents with localisation commitments and translating values into clear behavioural and structural expectations.

- Policies / Processes / Procedures:

Without procedural reinforcement, behavioural intentions cannot become institutional norms. Therefore, organisational processes should embed PB into all core procedures, require partner participation, standardise equitable risk and cost-sharing, ensure transparent and participatory decision-making, and create feedback loops that continuously integrate partner perspectives

- Favourable Conditions for Learning, Relationship Management & Accountability (Culture):

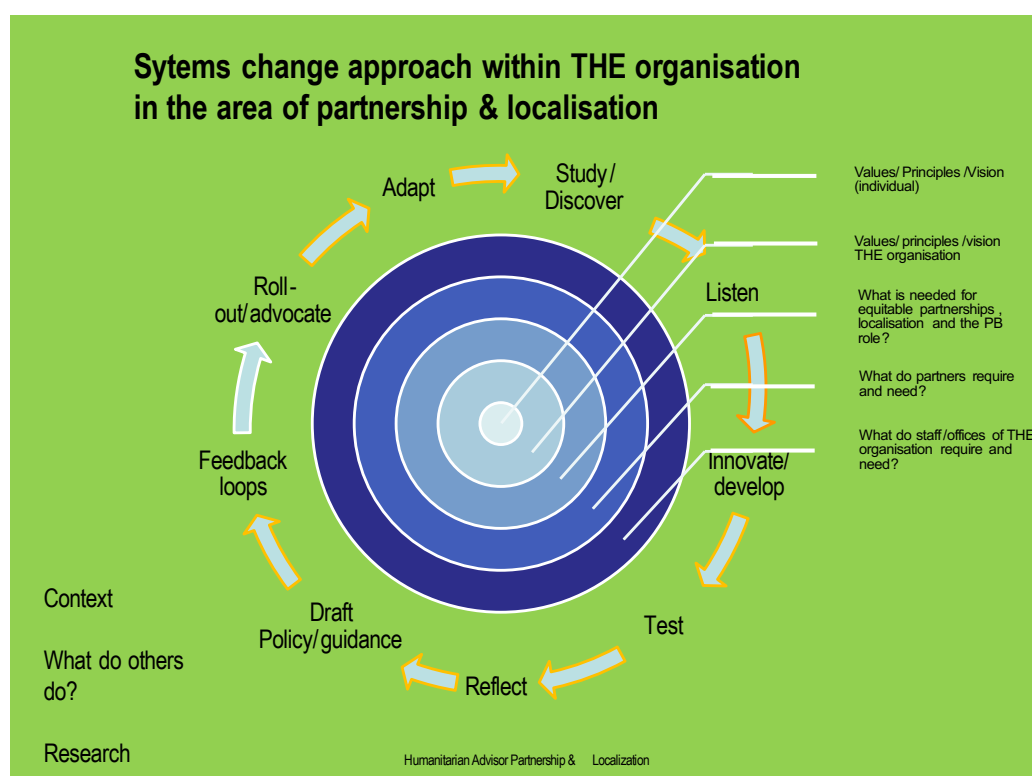
PB institutionalisation requires a relational, learning-oriented culture. Therefore, a supportive culture must legitimise relationship-building, prioritise partnership brokering, create psychologically safe reflective spaces, reward collaboration, and strengthen accountability to partners as well as to internal hierarchies.

So, from a perspective of the PB institutionalisation, The PB role becomes the **bridge** between behaviour and system, by embodying the **behavioural catalyst** and **system coherence mechanism**.

Reflection 2: Linking the Organisational System of PB Institutionalisation with a Design Thinking Perspective

The following diagram, developed through personal reflection, has proven useful for visualising the steps required to introduce both the Partnership Brokering Role and equitable partnership and localisation-related approaches through Policies, SOPs, guidance and related instruments.

This visualisation and the associated reflections are now further enriched by conceptual approaches drawn from a Design Thinking perspective (see Annex 3 for further detail).



All the steps described consistently take into account individual values, the values and principle of The organisation, organisational needs from a systems and strategic perspective, the claims and requirements of partners, and the needs of individuals within the organisation (staff and offices). These considerations are embedded within the broader global context, as well as within specific contextual trends and challenges.

- A. Study and discover:
Build a deep understanding of organisational reality by analysing values, narratives, internal patterns, and external research to identify alignment, gaps, and relevant practices.
 - B. Listen:
Collect diverse stakeholder perspectives to clarify their real needs and define the actual problems that must be addressed, beyond policy assumptions.
 - C. Innovate and develop:
Co-create solutions/prototypes (in project/working groups or bilaterally) or based on the evidence of previous phases.
 - D. Test:
Pilot proposed solutions on a small scale, in real contexts to test whether the PB role/methodology, tools, and collaborative structures function effectively and genuinely strengthen partner voice and partnership practice.
 - E. Reflect:
Make learning from testing explicit and encourage joint and individual reflection—examining improvements, resistance, unintended effects, required time and skills—while integrating feedback from partners, staff, and working groups.
- Innovate/ develop, Test and Reflect can be repeated several times or under different conditions before the next phase is addressed.
- F. Draft:
Develop policies, SOP and guidance, embedding PB.
 - G. Feedback loops:
Establish continuous feedback loops with staff, partners (like the partner sounding board), and stakeholders before and after adoption of policies, to ensure that proposed policies or structures genuinely improve equitable, collaborative partnerships and localisation outcomes.
 - H. Roll-out and advocate:
Scale tested PB-related innovations across the organisation, ensures their practical uptake through appropriate methods, and advocates internally and externally for the PB role, equitable partnerships, and locally led approaches.– conceptual approaches to ensure absorption and real-world application.
 - I. Adapt:
Continually improve and adjust direction, strategies, structures, and behaviours based on new evidence.

5. Conclusions

PB grounded in the organisation's clear values and vision

The institutionalisation of the Partnership Brokering (PB) role is firmly anchored in the organisation's long-standing commitment to localisation, equitable and collaborative partnerships, and principled humanitarian action. The organisation's evolution demonstrates that PB represents a natural extension of its core values. These values provide the moral, strategic and operational foundation on which PB practices are consistently embedded. Importantly, PB is not understood in isolation from the practical realities of partnering and locally led action. Together, these elements ensure that PB is grounded in a coherent strategic direction and aligned with the deeper purpose of enabling locally led humanitarian action.

PB as a central role for system change within the organisation

The PB role emerges as an essential driver of organisational transformation, connecting the organisation's identity, intermediary function and localisation commitments. Findings from surveys, consortia lessons and internal reflections show that many current challenges are precisely those that PB helps to address by providing clarity, structure and relational coherence. By aligning organisational visions and perspectives, facilitating analysis and dialogue, fostering trust and promoting self-reflection, PB bridges programme delivery, partnership practice and organisational development. It therefore becomes central to translating commitments into practice and acts not merely as an operational function, but as a key catalyst for sustained system change.

Critical self-reflection and system change as foundations for PB institutionalisation

Institutionalising PB does not rely on policies or individual goodwill alone, but requires a careful balance between behavioural change and systems' reform. Staff have often modelled PB principles before formal structures existed, revealing both organisational readiness and gaps. However, without supportive systems, such behaviours remain inconsistent, while systems that are not aligned with behaviour risk generating superficial compliance. A system change perspective - drawing on behavioural science, organisational development tools such as Lewin's Force Field Analysis and Weisbord's Six-Box Model, as well as the Design Thinking cycle - demonstrates that sustainable institutionalisation depends on critical self-reflection, psychological safety, deliberate learning, and the reinforcement connections between people's practices and organisational structures.

Institutionalisation of the PB role in relation to wider system change

Embedding PB within the organisation also strengthens its contribution to wider humanitarian system change. The PB role positions the organisation as a connector across local, national and international actors, enabling equitable consortia, community-led decision-making, cross-sector coordination and advocacy for locally led approaches.

Drawing on four pathways to systems change and relating them to the institutionalisation of PB as an enabler of equitable partnerships and localisation, transformation occurs when:

1. collective advocacy and influence reshape expectations within the wider partnering and localisation environment;
2. individual convictions and choices accumulate to influence organisational preferences and political-institutional priorities;
3. local and national partners, together with networks of like-minded organisations (such as C4C, P4C and NEAR), establish shared norms that gradually draw more hesitant international actors into new ways of working; and
4. structured collective arrangements—such as external commitments, requirements and corresponding reporting mechanisms—provide the support needed for individual organisations to sustain new behaviours until they become embedded within the system itself.

Annex 1: Force Field Analysis – Institutionalising the Partnership Brokering Role (according to the Weisbord 6-Field Model)

This analysis is grounded in the organisation's values, vision, commitments, and approaches as a faith-based humanitarian actor. The organisation operates with a clear localisation and systems change agenda, within the broader context of humanitarian reform, financial constraints and decentralisation.

Drawing on survey results, organisational policies and guidance, workshop findings, and internal reflections conducted by the internal Partnership Broker from 2023 to 2025, Force Field Analysis based on Kurt Lewin's framework is conducted using Weisbord's Six-Box Model. This process includes the development of reflective questions, designed both for the organisation itself and for other organisations with a similar profile seeking to institutionalise the Partnership Brokering role.

Each factor is accompanied by approximately three reflective questions. These questions are designed to support self-assessment for the organisation and for other organisations with a similar profile that are seeking to institutionalise the Partnership Brokering role. They can be used as a foundation for developing an institutional action plan.

Purpose

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Clear organisational commitment to equitable partnership and localisation	5	- How consistently is this commitment expressed in country strategies and programmes? - Do partners recognise this commitment in their lived experience with the organisation? - Where are there gaps between policy language and day-to-day decision-making?	Purpose not consistently translated into PB-related workflows and tools	4	- Where in the project or partnership cycle is the PB purpose most visible? - Where is it absent or left to individual initiative? - How could existing tools make the PB purpose more concrete?
PB purpose aligned with organisational identity and external commitments	4	- How explicitly is PB described as a way of living out localisation and partnership principles? - Do staff understand how PB connects to external commitments (e.g. localisation, partnership charters)? - Where could PB be communicated more clearly as part of the organisation's identity?	Donor and compliance pressures that deprioritise PB behaviours	4	- Where do reporting and compliance demands significantly reduce time for brokering? - How often is PB explicitly considered when negotiating with donors? - What strategies could protect space for PB within donor-funded projects?

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Partner appetite for more co-creation and facilitated collaboration	4	- In which areas do partners actively ask for more facilitation or shared decision-making? - Where do partners feel they have space to influence strategic choices? - Where do partners still experience relationships as primarily contractual?	Limited shared understanding of PB scope and boundaries across teams	3	- Do colleagues in different roles have the same understanding of PB? - Where do misunderstandings lead to duplicated or neglected functions? - How can the PB role be described simply and consistently across the organisation?

Structure

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Existing SOPs, guidance and consortia/bilateral governance frameworks	4	- Which structural tools are already in use and where? - Where have these structures demonstrably improved partnership practice? - What learning exists on how to adapt them to different contexts?	Inconsistent implementation of governance mechanisms across offices	5	- Where do governance structures exist only on paper? - What prevents regular convening or effective use of these committees? - How does inconsistency affect partner expectations and trust?
Localisation and partnership strategies that call for shared decision-making structures	4	- Do country offices have governance arrangements reflecting these strategies? - Where are partners part of decision-making committees? - Where is there a gap between strategy and actual governance?	Ambiguity about where PB sits structurally	4	- Is PB seen as a function of programme, partnerships, MEAL or management? - How does this vary across offices and teams? - What structural location would best enable multipartiality and influence?
Examples of functioning partnership and consortia/bilateral	3	- What makes these examples work well? - How is PB implicitly or explicitly	Limited integration between PB processes and existing project	4	- At which stages of the project and partnering cycle is PB currently visible? - Where does it depend on personal

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
governance bodies		- performed within these bodies? - What elements of these models could be replicated elsewhere?	management structures		- initiative rather than system design? - How could PB checkpoints be built into existing workflows?

Relationships

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
High levels of interpersonal trust between many staff and partners	5	- Where is trust strongest and what contributed to this over time? - How is trust maintained under pressure or during crises? - How can trusting relationships be leveraged to support PB practice?	Communication gaps and delays that undermine partner confidence	4	- Where do partners experience slow or unclear communication? - What internal bottlenecks contribute to these delays? - How could PB roles support clearer, more predictable communication channels?
Shared commitment to values such as dignity, fairness and transparency	4	- In which moments do these values explicitly guide relational choices? - Where are they challenged by operational or political realities? - How might PB help make these values more visible in day-to-day interactions?	Dependence on individual staff for relationship quality	4	- Where are key relationships concentrated in one or two people? - What happens when those individuals are absent or overloaded? - How can relationship stewardship be shared across a team?
Existing positive experiences with facilitated multi-actor processes	3	- What did partners and staff appreciate most about these processes? - What conditions enabled open dialogue and	Limited structured approaches to addressing conflict and relational tensions	4	- How are tensions currently surfaced and handled? - Where do unresolved tensions quietly erode trust? - What PB practices could

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
		joint problem-solving? How can similar spaces be created more systematically?			support constructive conflict transformation?

Rewards

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Strong intrinsic motivation among staff to work in collaborative and ethical ways	4	- Where do staff go beyond formal requirements to support fair partnerships? - How do staff describe what motivates them most in their work? - How could PB recognition tap into this intrinsic motivation?	Performance systems that reward compliance and delivery over brokering	5	- What indicators are currently used to assess staff performance? - Do any explicitly reference PB tasks or partnership quality? - Where do staff feel tension between doing what is 'measured' and what is 'right' for partnerships?
Emerging internal recognition of PB-related behaviours	3	- Where have PB behaviours already been celebrated or highlighted? - What difference did this recognition make to practice? - How could these examples be amplified across the organisation?	Limited visibility of PB work in reporting and communication	4	- Where is PB invisible in project and portfolio/programme reporting? - How could stories of PB impact be documented and shared? - What channels could showcase PB successes to leadership and peers?

Helpful Mechanisms

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Existing PB-relevant tools (partnering cycle, DD, risk-sharing)	4	- Which tools are most directly supportive of PB practice? - Where have they already	Inconsistent uptake of tools across offices and teams	5	- Where are partnering tools not used and why? - Are barriers related to awareness,

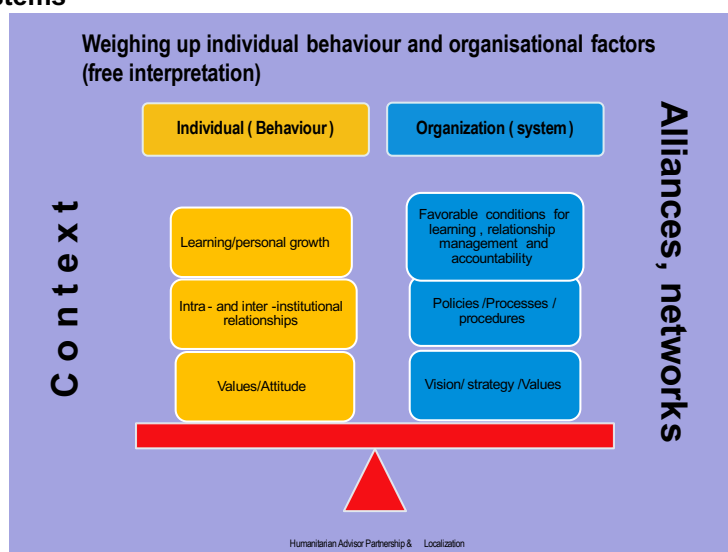
Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
		- contributed to better partnership outcomes? - How could these tools be prioritised and made more user-friendly?			- relevance or workload? - How can leadership clarify expectations around tool use without overburdening staff?
Growing internal awareness of the need for structured partnership processes	3	- Where do staff themselves request more guidance or tools? - What existing informal practices could be turned into simple mechanisms? - How can mechanisms be co-designed with users to increase ownership?	Limited PB-specific training on how and when to use mechanisms	4	- What training exists on partnership tools, and who has access to it? - Where do staff feel least confident in applying mechanisms? - What would a simple, practical PB learning pathway look like?

Leadership

Favourable Factor	Weight	Reflective Questions	Hindering Factor	Weight	Reflective Questions
Leadership narratives supportive of localisation and equitable partnership	5	- How often do leaders speak about partnership and PB in formal spaces? - Where do staff see alignment between words and actions? - What stories do leaders tell about successful PB?	Inconsistent modelling of PB behaviours across leadership levels	5	- Where are there gaps between leadership messages and daily decisions? - Which PB behaviours are modelled, and which are absent? - How do staff interpret these inconsistencies?
Examples of leaders creating space for reflection and joint learning	4	Where have leaders protected time for partnership reflection or learning?	Limited leadership accountability for partnership quality and PB practice	4	- How is leadership currently held accountable for partnership behaviours? - What indicators could be used to

		• What impact did this have on staff and partners? • How could such practices be scaled or systematised?			• strengthen accountability? • How might partners be involved in providing feedback on leadership practice?
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Annex 2: Full reflection on the balancing between the individual behaviour and the organisation's systems



A. Individual Behaviour Side

A.1 Values / Attitude

Behavioural changes required:

- Staff embody **equity, humility, transparency, and accountability** in daily interactions.
- PBs champion values of **co-creation, shared leadership, and mutual accountability**.
- Individuals move from “managing” partners to **enabling partner leadership**.
- People shift mentality from compliance-first to **relationship-first within a principled framework**.

Why these matter:

Attitude is a precursor to behaviour. Without value alignment, localisation remains rhetorical rather than lived.

Values become **pathways or barriers** to PB-institutionalisation:

- When individuals embody reflective, egalitarian values, they amplify PB principles across the organisation.
- Their commitment helps others see PB as feasible and culturally legitimate.
- If individuals cling to compliance-first or hierarchical attitudes, system change is slowed or resisted.

A.2 Intra- and Inter-institutional Relationships

Behavioural changes required:

- Individuals adopt relational disciplines: listening deeply, sharing decision space, and treating partners equitably.
- PBs and staff proactively surface tensions, mediate conflicts, and name power imbalances rather than bypassing them.
- Staff shift from “task delivery” to relationship stewardship, seeing relationships as part of the work, not beside it.
- Managers model trust-based collaboration, replacing hierarchical reflexes with joint problem-solving habits.

Why these matter:

Partnerships break down or thrive primarily at the relational level. Consistency here enables systemic equity.

These relational behaviours often **appear long before any formal PB role exists**. Employees—especially those in daily contact with partners—act as *early prototypes* of PB:

- Their ethical choices, communication style, and responsiveness **legitimise PB** before it is formally recognised.
- When individuals act collaboratively and equitably, they **normalise PB** as a meaningful organisational practice.

- Conversely, when individuals prioritise speed, transactional delivery, or avoidance of complexity, they **reinforce an older system** that sidelines PB principles.

A.3. Learning / Personal Growth

Behavioural changes required:

- Individuals develop power literacy (understanding positionality, structural inequity, and the legacy of coloniality).
- Staff build confidence in facilitation, brokering, and conflict transformation – core skills of the PB role.
- Teams embrace reflexive practice: learning from mistakes, challenging habits, asking “How did my behaviour reinforce or shift power?”
- Individuals become comfortable working in ambiguity and tension, essential for system-shifting work.

Why these matter:

Localisation requires internal transformation; individuals must grow into roles that are relational, adaptive, and reflective.

PB institutionalisation is a gradual process, **personal learning and interpretation** play a crucial role:

- Staff adapt PB principles based on their own development, experiences in workshops, or peer learning.
- These personal routines become **proto-forms** of organisational standards.
- Learning happens *before* formal policies exist, meaning individuals essentially **co-design the system** through their learning journeys.

B. Organisational System Side

B.1 Vision / Strategy / Values

System changes required:

- Ensure organisational strategies explicitly position local leadership, equitable collaboration, and PB as strategic pillars.
- **Align all strategic documents** with localisation commitments (e.g., Charter4Change principles) and make this visible to staff and partners.
- Integrate partnership brokering responsibilities into **organisational visions** of how change happens.
- Translate values into behavioural standards and structural expectations.

Why these matter:

Behavioural change scales only when supported by strategic clarity and shared purpose.

Values become **pathways or barriers** to institutionalisation:

- When individuals embody reflective, egalitarian values, they **amplify PB principles** across the organisation.
- Their commitment helps others see PB as *feasible* and *culturally legitimate*.
- If individuals cling to compliance-first or hierarchical attitudes, system change is slowed or resisted.

B.2 Policies / Processes / Procedures

System changes required:

- Integrate PB steps **into all SOPs**, templates, partnership agreements, and consortia design processes.
- Make **partner involvement** in decision-making **procedurally required**, not optional.
- Create **standard organisational mechanisms** for risk sharing, overhead sharing, and co-governance.
- Build consistent **decision processes** that are **fast, transparent, and participatory**.
- Establish feedback loops where partner insights shape organisational processes.

Why these matter:

Without procedural reinforcement, behavioural intentions cannot become institutional norms.

- Formalisation **reduces ambiguity**, allowing individuals to understand what “good partnering” means in practice.
- It creates predictable patterns and lowers cognitive load, especially for new staff.
- It prevents PB from being dependent on personalities or inconsistent interpretations.

- It mitigates organisational risk by clearly linking PB to accountability, quality, and localisation commitments.

B.3 Favourable Conditions for Learning, Relationship Management & Accountability (Culture) **System changes required:**

- A culture that **legitimises relationship-building as core work**, not an optional activity.
- **Leadership signals that partnership brokering is a priority** (e.g., visible support, expectations, resources).
- Establish **psychologically safe spaces** for reflection, feedback, and raising concerns, including around power and equity.
- Reward collaborative behaviour, not only compliance and delivery.
- Build **horizontal accountability**, where staff are accountable to partners, not only to donors or line managers.

Why these matter:

PB institutionalisation requires a relational, learning-oriented culture.

Formalisation reinforces behavioural shifts by:

- Setting expectations that PB is valid, recognised work (not “extra”).
- Giving individuals **institutional permission** to invest time in collaboration, reflection, and facilitation.
- Reducing dependence on personal champions who might otherwise burn out.

Culture is also where **tensions emerge**:

- Overreliance on individual good will leads to inconsistency.
- Overreliance on formal rules risks empty compliance.

The Balance: Context and Interdependence

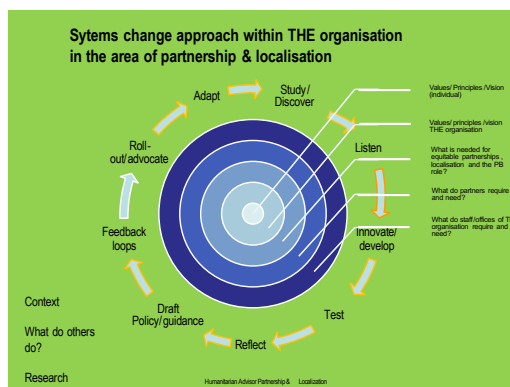
The balancing of **individual behaviour** and **organisational systems** is vital: behavioural change without system change leads to burnout; system change without behaviour change creates hollow reforms.

How context affects balance:

- External systems (donors, regulations, political pressures) influence what is possible internally.
- Internal context (leadership, stress levels, previous experiences, organisational memory) shapes readiness.
- Brokering requires constant **calibration** between individual agency and structural constraints.

The PB role is uniquely positioned to manage this balance.

Annex 3: System change approach within The organization based on Design Thinking approach and adapted to own application



A. Study and discover (Discover, DT)

Purpose for system change

- Establishes a **deep understanding of the current organisational reality**: values, beliefs, narratives, lived experiences.
- Examines *individual* and *organisational* values to reveal where alignment and misalignment exist.
- Analyses internal patterns,
- Collects and analysis research, publications, external trends, conceptual and methodological approaches and comparative practice ("What do others do and apply?").

Contribution to system change

- Creates the **baseline for transformation**.
- Builds a shared understanding of *why* change is needed, preventing superficial or symbolic reforms.
- Identifies structural blockages and behavioural patterns that hinder equitable partnerships and localisation.

B. Listen (Discover → Define, DT)

Purpose for system change

- Gathers perspectives from:
 - Partners
 - Staff
 - Affected communities (if included in later stages)
 - Internal leadership
- Clarifies **what different actors truly need - what problems must be addressed**, not just what policies assume.

Contribution to system change

- Creates **relational insight** and increases trust.
- Reveals the **real conditions** required for localisation equitable partnership and partnership brokering.
- Helps define shared priorities in an inclusive manner, preventing top-down strategies disconnected from lived experience.
- Shapes a refined **problem definition**: what problem are we solving, and for whom?

C. Innovate and develop (Develop, DT)

Purpose for system change

- Generates new ideas, models, behaviours, tools, or structures.
- Enables co-creation between partners, staff, leaders, and PBs in working/project groups or bilaterally.
- Moves beyond analysis to imagining feasible solutions.

Contribution to system change

- Encourages **experimentation**, not perfection—crucial for complex system transformation.

- Ensures solutions reflect the realities of users (partners, staff), not only organisational assumptions.
- Produces a **portfolio of prototypes**: new partnership models, PB role descriptions, governance mechanisms, capacity-sharing approaches, etc.

D. TEST (Deliver, DT – prototype stage)

Design principle reference: *Iterate, Iterate, Iterate.*

Purpose for system change

- Trials the solutions at **small scale, in specific countries and context** to gather evidence:
 - Does the PB role work in practice?
 - Does the consortium set up methodology work?
 - Is the revised Due diligence tool easily applicable?
 - Is the collaborative governance structure suitable?
 - Does partner voice increase?
 - Were the Partnership Principles put into practice?

Contribution to system change

- Creates **real-life proof** of what works and what doesn't.
- Reduces risk by preventing large-scale rollout of untested concepts.
- Encourages a culture where learning and adjusting are normalised organisational behaviours.

E. REFLECT (Cross-cutting DT)

Purpose for system change

- Makes visible the learning emerging from the test phase.
- Joint learning in working groups, reflective practice within the organisation, incorporate feedback from partners and staff, individual reflection
- Encourages staff to ask:
 - What improved?
 - What resisted change?
 - What unintended effects appeared?
 - How much time was needed?
 - What special skills or experience were needed?

Contribution to system change

- Contributes to **organisational sensemaking**, where experiences become codified insights.
- Prevents the organisation from repeating old patterns.
- Strengthens psychological safety, openness, and learning culture.

F. Draft policy/guidance/SOP (Define → Develop → Deliver, DT)

Purpose for system change

- Translates learning into **formal structures**:
 - Procedures
 - Guidance
 - Job descriptions (e.g., PB role)
 - Decision frameworks
 - Partnership standards

Contribution to system change

- Shifts solutions from practice to **policy**, embedding them into organisational routines.
- Ensures innovation becomes **institutional**, not dependent on individuals.
- Creates the structural backbone that supports behavioural change.

G. Feedback loops (Deliver → Discover, DT)

Purpose for system change

- In the first stage, before adapting or approving any new policy or SOP guidance, several feedback loops with staff from different offices, the partner sounding board, other relevant internal actors, and senior management take place, and the feedback is incorporated.
- Ensures continuous feedback mechanisms from partners, staff, and stakeholders.

- Checks whether new “structures” actually improve equitable, collaborative partnerships and localisation outcomes (check impact).

Contribution to system change

- Creates reinforcement cycles that **correct system drift**.
- Allows the organisation to remain adaptive rather than static.
- Ensures changes are **anchored in lived reality**, not just strategic intent.

H. Roll-out and advocate (Deliver; DT)

Purpose for system change

- Scales the tested and validated innovations (like policies, guidance, SOP) and PB practices across the organisation.
- Uses diverse methodological – conceptual approaches to ensure absorption and real-world application
- Advocates internally and externally for:
 - The PB role
 - Equitable partnership models
 - Localisation and locally led and owned approaches

Contribution to system change

- Embeds innovations into:
 - Organisational culture
 - Identity
 - External advocacy
 - Partner expectations
- Signals organisational commitment, creating **wider system influence**.

I. ADAPT (Entire Design Thinking mindset)

Purpose for system change

- Adjusts direction, strategies, structures, and behaviours based on new evidence.
- Prevents stagnation and ensures relevance over time.

Contribution to system change

- Strengthens a **learning organisation**, capable of evolving and adjusting to changing realities.
- Keeps partnership and localisation agendas dynamic, not static.
- Embeds system change into an ongoing organisational rhythm, not a one-time project.

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