



# COUNTING WHAT COUNTS

An invitation to join a project to explore the important role of donors in building capacity for, and increasing the impact of, multi-stakeholder partnerships

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## WORKING WITH DONORS

*“It is increasingly clear that there are a number of potential ways in which donors can engage more deeply in promoting effective partnerships – over and above providing funding – so that collaboration helps them as well as their grant recipients to achieve their important and ambitious sustainable development goals”<sup>1</sup>*

### Partnering as value

Albert Einstein<sup>2</sup> took the view that there are many forms of value in human endeavor and that it really matters to understand ‘what counts’. The conviction that it is essential to understand better what counts in collaborations underpins, informs and drives our **Working with Donors** project.

The UN included ‘partnership’ as a separate and distinct 17<sup>th</sup> Sustainable Development Goal in setting the agenda for the transition to a more sustainable and prosperous world over the next decade<sup>3</sup>. This move recognizes that collaboration as a way of operating is a value – not just a tool, but a goal in of itself. Collaboration as a value is coming to be recognized in many situations, especially where there are confrontation, conflict and post-conflict scenarios.

Donors play a critical role in promoting and supporting partnering not just as a tool or method, but as a value, whether to achieve the SDGs or in any number of other initiatives across the globe. However, our experience is that donors struggle to understand partnering and how best to support / invest in / adapt to partnerships as a design and delivery mechanism and that they can (unintentionally) hinder rather than assist partners in their attempts to bring about collaboration that is truly transformational.

The Partnership Brokers Association (PBA) is convening a group of private and public donors and key others for a joint effort called **Working with Donors**, which seeks to understand better and increase the impact of donor partnering efforts and investments by:

- **Exchanging** knowledge, insights and experiences of partnering and funding partnerships;
- **Collating** such evidence as there is about the impact of donors on effective partnering;
- **Undertaking** action research into examples of innovative or successful funding / resourcing practices;
- **Developing** practical information materials and on-line learning / capacity building workshops to share findings and shape donor approaches going forwards;
- **Exploring** and testing new approaches to donor / partner relationships that will achieve more substantive outcomes.

We are seeking to operate the **Working with Donors** project as a joint venture designed to generate mutual benefit, mutual learning and collaborative working. In this way, we can achieve more.

### The need

The **Working with Donors** project is a response to the need and opportunity for understanding better – with the help of the many practitioners (partnership brokers) in our global network – how donors participate in and contribute to partnering processes and what the potential is for changing the donor: partner relationship to be more effective and have greater impact. External donors already play a critical role in advancing partnership practice for greater effectiveness and impact – but this is neither universal nor optimal. The key to achieving more lies in building stronger partnerships and more effective partnership processes so that multi-stakeholder partnerships for sustainable development enable rather than stifle the innovation and transformation so urgently needed.

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<sup>1</sup> *Shifting the Power – how can working in partnership help?* Tennyson, R. & Hundal, S., 2016, written and published by PBA for the Global Summit on Community Philanthropy (Johannesburg, December 2016)

<sup>2</sup> *“Not everything that counts can be counted and not everything that can be counted counts” – Albert Einstein*

<sup>3</sup> UN’s Sustainable Development Goals (SDGs) endorsed by 193 nations in 2016

## THE CONTRIBUTION OF DONORS

*“In a partnership scenario with multiple stakeholders, the term ‘donor’ needs further clarification. In a partnership paradigm, resources contributions and commitments are about more than simply money... so surely all those who contribute time, effort and ideas are as much donors as those who contribute cash. If all partners are in some way or other making a contribution to the initiative, are not all partners also de facto donors?”<sup>4</sup>*

For the purposes of the **Working with Donors** project, donors include private foundations, bilateral and multi-lateral development agencies, international development NGOs, governments and public agencies, businesses and corporations, faith-based organisations, as well as individuals. They donate or provide money, services or gifts-in-kind voluntarily with a motivation that is philanthropic or altruistic in nature and with a social, environmental or other public purpose. Given our contention that all those making a contribution (of whatever kind) to a partnership are also donors, we have chosen to use the term ‘external donors’ to differentiate those operating externally to the partnership and providing funding.

External donors are increasingly advocating and funding partnership-oriented initiatives, projects and programmes to generate social, environmental and economic benefits that can be sustained. Over the past two decades or more, many donors have also worked in funding partnerships themselves, pooling and deploying funds alongside other donors. Thus, they have a range of experiences in working on partnership initiatives from the perspective of both being donors and being partners (with other donors and, sometimes, with their grantees and other stakeholders).

### What does it take to be a ‘partner’?

The dictionary definition of a ‘partnership’ is: *an on-going working relationship where risks and benefits are shared*. Whilst we believe that partners in every new partnership should explore and agree a definition that they can own and abide by, and that these definitions may vary considerably from partnership to partnership, it is clear that the term does mean something rather specific. It is more than another word for ‘relationship’. Let’s explore this a little further.

In a partnership, it is a basic premise that all partners contribute (albeit different things) just as all partners benefit (by achieving their specific individual or organisational goals). Partners work together to develop their ‘modus operandi’ and to co-create working arrangements that will be efficient, effective and allow for imaginative and transformational solutions to what appear to be intractable challenges.

A recent study<sup>5</sup> found that 70-80% of partnerships were described by those involved in them as ‘donor-driven’, suggesting that external donors play a critical in shaping operations and impact of the partnership. Only a few donors actually engage with the partnership as genuine partners. This may of itself be at best confusing and at worst destabilizing to effective partnering since donors often expect to have a significant degree of control over the partnership without engaging with it or understanding its complexities.

A key issue for all those involved in partnering is how to balance the needs of external donors – undertaking due diligence and financial reporting as required – and those of the partners and the partnership. This is because the effectiveness and impact of a partnership is tied to partners developing a sense of autonomy, integrity and equity as a basis for generating engagement, commitment and sustainability.

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<sup>4</sup> Tennyson, R., & Wilde, L. *The Guiding Hand – Brokering Partnerships for Sustainable Development* 2000, published by IBLF, UNSSC and UN Publications

<sup>5</sup> *Emerging Partnering Lessons from Diverse Contexts*, 2016, published by PBA and PEP (Promoting Effective Partnering) available from [www.effectivepartnering.org](http://www.effectivepartnering.org)

## Money matters

It is, of course, true that money does matter. By providing money to initiatives, projects and programmes, private and public donors enable things to get done and challenging situations to improve. To be effective and transformative, partnerships need money to pay for operations and activities, which are often taken for granted or not sufficiently 'valued'. However, not everything can be achieved or sustained simply by cash injections, however crucial these are. This is because partnerships also rely significantly on the non-cash contributions of partners, other stakeholders and communities. Money is important but it is part of a bigger picture.

There is no question that those who are in a position to contribute cash also wield power and influence by determining priorities and the narrative that fills operational realities of a partnership, as well as the political, media and public discourses that provide the context for those operations. As public donors become more constrained and consequently more controlling in their approach, and private philanthropists take over from governments in setting targets and priorities, many of those on the front-line and / or on the receiving end of grants feel their voice no longer counts. They feel that those with the money have too much power and call all the shots without being held to account themselves.<sup>6</sup>

## RESOURCING – BUILDING NEW FRAMEWORKS

*“A partnering mind-set brings a genuine curiosity together with the ability and willingness to explore diverse perspectives and experiences. It establishes equity and respect where little may have existed before. It builds openness and enthusiasm for all voices (even those without perceived power) to be heard. It explores and validates both individual and mutual interests and seeds courage to make a difference on issues that are important to those involved”<sup>7</sup>*

In both domestic and international development contexts, there are serious funding shortfalls for designing and implementing development projects and programmes, and across the globe there is the prospect of further budget cuts. How will the SDGs be achieved is unclear when there is a funding gap and very little prospect that governments will be able or willing to step in. The growing role of private sector funding and/or private philanthropic funding, including impact investment, brings with it a different type of narrative and public discourse, with unknown consequences for accountability, public engagement and most importantly for ways of operating on the ground.

With respect to partnering and partnerships, the need is not just for new innovative financing arrangements but also for re-thinking and creating a far more comprehensive approach to the wider issue of resourcing and what constitutes a 'resource'.

New opportunities lie with non-traditional alliances, in which businesses, non-profits, international development organisations academia, the public-sector and communities themselves work together to co-create innovative approaches out of the diverse contributions each can make. The key is to work out ways of building more comprehensive and sustainable resourcing arrangements. For such arrangements to work, it is important to emphasise and underscore the value of the collaboration, as opposed to the value of the donation or funding that made that collaboration possible. Every type of resource needs to be valued – and not just in monetary terms (as in 'monetised') but in terms of its more complex, intangible value.

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<sup>6</sup> See for example, David Callahan, *The Givers: Money, Power and Philanthropy in a New Gilded Age*, New York: Alfred Knopf, 2017.

<sup>7</sup> Marcia Dwonczyk, Accredited Partnership Broker & PBA Associate, quoted in *Shifting the Power – how can working in partnership help?* (see above)

Part of the challenge of creating a methodology for ‘counting what counts’ is to provide a practical way of assigning quantitative value to non-cash donations and unexpected / wider outcomes resulting from collaboration. This requires working out what constitutes an appropriate balance between cash and non-cash contributions. But perhaps a more important part of the challenge is to work out who decides, on what basis they do so and in whose interest, if we accept that cash and non-cash contributions must be part of a comprehensive resourcing plan.

This can be done: where there’s a will, there’s a way.

The **Working with Donors** project aims at supporting external donors in recognising this range (and more to be identified) of critical roles in supporting and building partnering as a sustainable development delivery mechanism.

Practical experience with partnerships indicates that donors can and do support / challenge / shape the partnering paradigm. Some of the ways donors are already shaping the partnership paradigm include<sup>8</sup>:

1. **Promoting** partnering as a delivery mechanism
2. **Providing** funding for partnership-generated projects
3. **Investing** in building partnering capacity and processes
4. **Developing** new ways of valuing non-cash contributions
5. **Brokering** new partnerships
6. **Engaging** as real partners
7. **Modeling** high standards in partnering practice
8. **Assessing** added value of partnering
9. **Building** constituencies for partnership action
10. **Influencing** policy and decision-makers
11. **Sharing** learning about partnering challenges
12. **Bringing** a longer-term perspective

## COUNTING WHAT COUNTS – PROJECT OUTLINE

*“Donors are often seen as signatories of a cheque, who remain in the background with little involvement in how the funding is being utilised. That is not our expectation... we want to be seen as a partner in the process along that journey...”<sup>9</sup>*

A first step is to search for good examples of where external donor-supported partnerships have achieved significant results – of which we believe there are several. Lessons from these will be pulled together to provide solid and compelling evidence on the ways in which donor-supported partnerships have achieved better results than other development and delivery mechanisms and have brought a valuable ‘return on investment’ to all those involved. The focus will be on partnerships where external financial contributions / money have been a significant factor.

The research will aim to understand both the benefits and the challenges to both programmatic activities and the partnering process from a high level of dependence on external donor funding and to find some compelling examples of where the external donor has engaged with partnerships in any of the following ways:

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<sup>8</sup> A 10-point list created for a meeting of the 6 USA-based donors forming the Global Alliance for Community Philanthropy published in *Shifting the Power – how can working in partnership help?* (see above)

<sup>9</sup> Lisa Doherty, Irish Aid, quoted in *Power & Politics – the Consortium-building Story Continues*, 2015 a case study written by PBA commissioned by the Start Network (available from [www.startnetwork.org](http://www.startnetwork.org) and [www.partnershipbrokers.org](http://www.partnershipbrokers.org))

- **Invested in the partnering process** prior to allocating project funding – enabling the partners to build their partnership prior to committing to a specific programme of work
- **Allocated funding specifically to strengthen the partnership** in addition to financing project activities
- **Pre-agreed an acceptable level of exploration, experimentation and risk** with partners to enable innovation and new ways of working – enabling partners to learn as they work together
- **Found ways of putting a tangible value and reporting on non-cash contributions**
- **Engaged with a partnership as a full partner** – attending partnership meetings and working with partners to co-create programmes and to regularly review the partnership itself in terms of unexpected outcomes, added value and impacts on systems

We believe that, in addition to finding a number of encouraging and landmark examples, a number of issues will emerge that will inform our proposed programme of workshops and dialogues that will be designed as ‘safe space’ in which honest reflection, mutual learning and open discussion can take place.

### Issues for exploration

The issues we anticipate being of importance<sup>10</sup> include:

- The (hidden or explicit) exercise of **power and / or control** – how these play out in partnerships and impact a partnership’s effectiveness
- The challenge of exercising **due diligence** in an equitable / co-created / locally owned model
- How the **accountability** requirements for the various players (including external donors) impacts and influences partnerships
- The tendency to **avoid controversial issues** or addressing challenges head on – thereby perpetuating unhelpful practices
- Fear of ‘failure’, loss of face and / or becoming marginalised – so **playing safe** (related to the above point) and small scale, incremental successes being seen as ‘good enough’
- A lack of **confidence in partnering as a paradigm** due to: frustrating experiences to date; too little evidence of their value; a lack of understanding of the need for investment
- The deeply embedded practice of **seeing money as the only currency** with which to assess value – so those giving cash have more power and influence than those giving other kinds of contributions

### Key activities and timeline

In the spirit of running this project as a genuine partnership, we propose to co-create the follow-on activities once the initial research phase has been completed. We will also draw together the emerging lessons from the experiences of PBA Associates who work with a number of donors in a wide range of contexts. All this will shape the activities and determine the timeline.

Our aim to complete the research phase as soon as possible in 2017 and to use this as a basis for a 2-year project. Our ambition is to impact the way donors are shaping partnering and partnerships, which we believe is timely. For this reason, we envisage a tight timeframe in order to seize the day and maintain a high level of momentum.

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<sup>10</sup> These are based on research findings and workshops to date and they may well change in the light of our proposed further research work

## Outputs and Outcomes

We anticipate a range of outputs and outcomes including:

- **First hand research** into donor engagement in partnering
- A range of well-written, practice-based, user-friendly **learning case studies** shared widely
- **Identification of the key issues and challenges** that donors and partners experience in working together
- **Clear benefits and changed practices** as a result of a range of ‘safe space’ dialogues, workshops and other events exploring the topic
- **Some clear evidence** that partnerships are increasingly created and driven by those who are most directly benefiting from their projects and programmes

## Contributions sought

We are looking to find a form of ‘stakeholder resourcing’ for this initiative – we need energy, time, access to information, new ideas, enthusiasm and experience as well some modest funding (preferably from a range of different types of donor) to get this project up and running.

## GETTING INVOLVED<sup>11</sup>

### As individuals

Change doesn’t happen by magic, it happens because individuals become challengers, champions of new ideas and / or agents of change. If you are one such person and are interested in taking forward our **Working with Donors** project, we are keen to hear from you...

### As partnerships / consortia

There is a global movement towards building partnerships and other forms of networked collaboration (for example, consortia) whether at local, regional, national or international levels. Some of these initiatives are challenging and changing current development practices, including the working relationship between donors and partners. This is also a key issue in relocating the power for development and delivery of projects closer to where the need is. Change is tough, it can be frustratingly slow and sometimes uncomfortable, even painful. Willingness to re-think, to cross-sectoral boundaries, to try doing things differently and just believing in there being a better way is just the start...

### As donor organisations

We believe that external donors are well intentioned and want to spend / invest the money they have wisely and productively and that many will welcome the opportunity to explore their role in partnering as a paradigm. Some donors have already indicated that this is the case and we welcome open discussions with any donor organization – just contact us and we’ll follow up in whatever way you would prefer...

### As individual donors

With the advent of crowd-funding, impact investment and social media, we have as individuals unprecedented range of opportunity to become ‘external donors’. If you as an individual donor would like to do more, we want to hear from you...

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<sup>11</sup> Our thinking here is that all of those involved in partnering are in some sense donors, so we seek to develop this project as a dialogue between the many different kinds of donors that between them can make or break a partnership’s transformational potential and / or effectiveness

## THE PARTNERSHIP BROKERING OPPORTUNITY

### What is PBA?

PBA<sup>12</sup> promotes partnership brokering (competent and confident management of the partnering process) and provides vocational training to those operating in this role. It has an alumni group of key players from all sectors (business, government, NGO, academia, multi-lateral agencies and communities) who are managing, developing and enabling collaboration processes in many different contexts. Operating as a non-for profit, social business, PBA advocates more transformational partnerships that challenge and go beyond business-as-usual. In so doing, we:

- **Challenge and change** poor partnering practices so that multi-stakeholder collaboration can become truly transformational
- **Ensure** those operating in partnership brokering roles are skilled, principled and work to the highest standards
- **Promote** the critical importance of partnering process management to decision-makers in all sectors

### How do we see our role?

As a small (therefore, nimble), independent, non-profit, distributed entity we believe we bring some useful assets to a convening / hosting / curating role. These include:

- Our ability to draw on the practical experience and insights of front line partnerships brokers working in all sectors and in a wide range of contexts
- Our independence from any specific sector and from reliance on donor funding
- Our track record of action research that gives voice to practitioners
- The fact both our training and our support work already involves a wide range of donor agencies
- Our acknowledged commitment to cutting-edge enquiry and our experience in curating new initiatives as joint ventures with a number of partners (for example of a current project being curated by PBA see: [www.remotepartnering.org](http://www.remotepartnering.org) )

### Our enthusiasm for this project

We see this project as providing opportunities for:

- **Sharing** field experiences and insights from partnership practitioners operating in different parts of the world and working with different types of donors
- **Creating** a neutral space for donors to reflect on their experiences to date as investors in partnerships
- **Bringing** donors and practitioners together to explore: their respective experiences of the donor: partner relationship; how best to build partnering capacity / partnership effectiveness (for partners) and how to improve impact from supporting partnering approaches (for donors)
- **Contributing** to strengthening the global movement for sustainable development through partnerships that are appropriate, timely, co-created and owned by those who benefit from them.

We believe the **Working with Donors** project could play a significant role in helping to shake up current practices and shape future approaches to investing in partnering and partnerships.

We look forward to hearing from you and discussing this with you!

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<sup>12</sup> For more background information on PBA please go to: [www.partnershipbrokers.org](http://www.partnershipbrokers.org)