



Remote Partnering: Survey Capturing Insights and Experiences of Partnership Brokers

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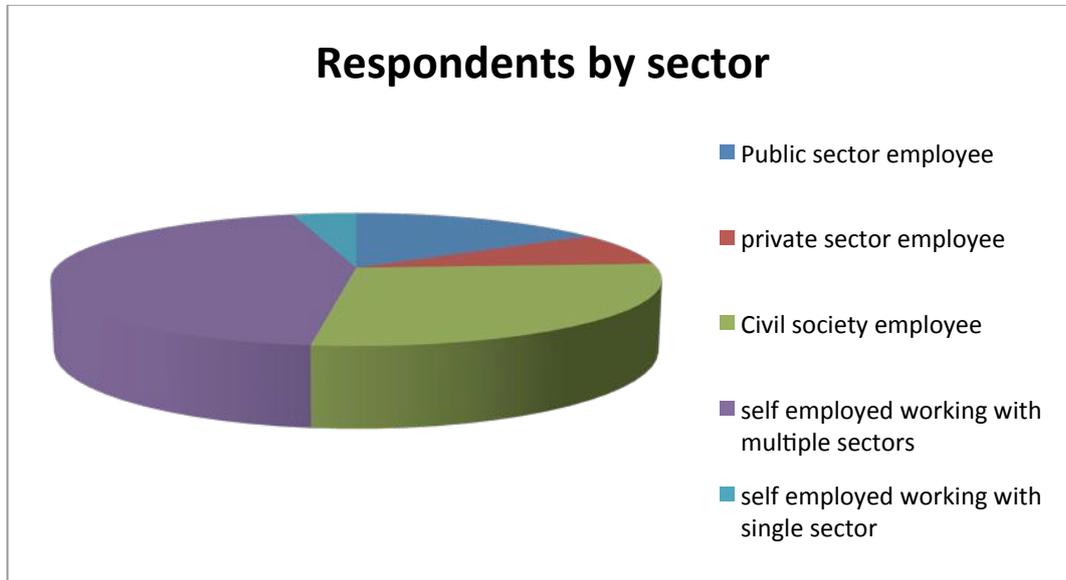
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20% say remote partnering is "always or often inadequate" and 80% say remote partnering "has some advantages or provides rich opportunities"



Introduction

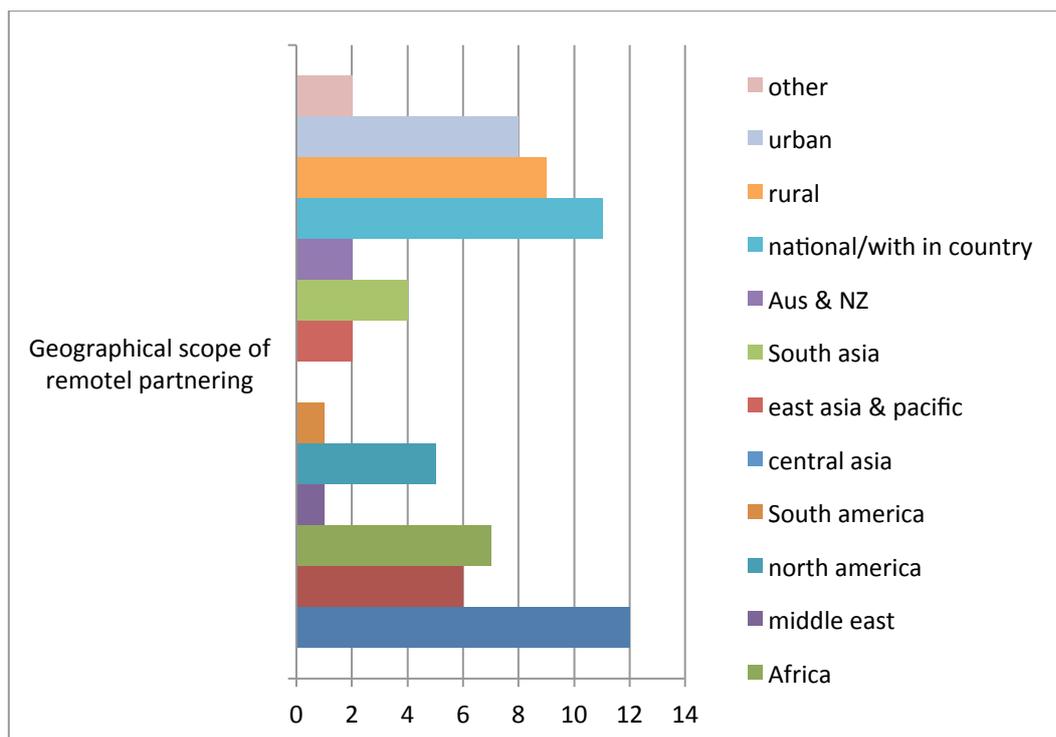
As part of the Remote Partnering Project (www.remotepartnering.org), a survey was created to gather perspectives and experiences from partnership brokers engaging in remote partnering. 25 trained partnership brokers completed the survey, split almost equally between those who are employees (internal partnership brokers) and those who are independents (external partnership brokers).



In terms of geographic spread, respondees came from the following regions:

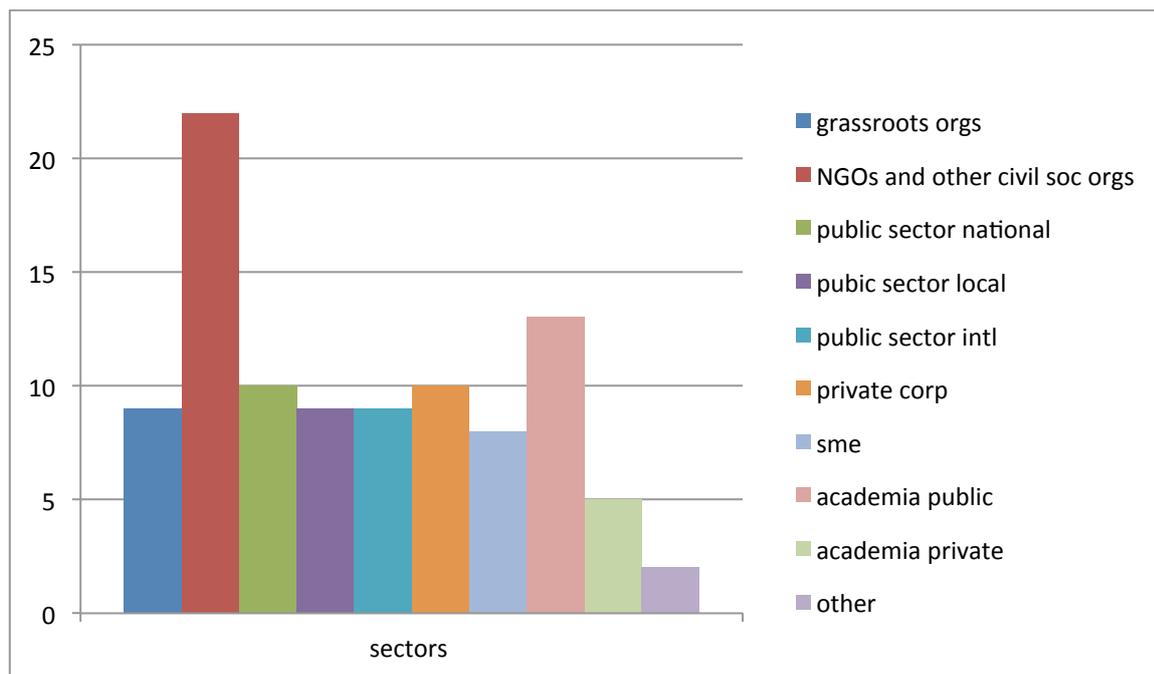
46% Europe	15% East Asia/pacific/Aus & NZ,
19% Africa,	4% South Asia/India subcontinent
15% North America,	

Those who responded are engaged in remote partnering in the following areas:



Other (2) Primarily at the sub-national and community level - Multi sectoral

Responses are based on remote partnering with the following types of partners:



Responsees are working in the following issue areas:

- 28% Humanitarian assistance
- 24% Health
- 16% Gender
- 16% Economic and social development
- 8% Agriculture and food security
- 8% Education
- 4% Mining sector community engagement
- 4% Freedom of speech
- There was a more or less equal split between rural and urban settings

Summary of Findings

- Remote partnering is a **necessary way of working** in the distributed workworld of the 21st Century driven by financial and time constraints and the need for efficiency in multiple projects
- Currently remote partnering is experienced by many as being **frustrating and challenging**
"I'd like to say 'provides different and rich opportunities for partnering effectively' but in reality, 'is often inadequate!'"
- Communication issues of various types arise – working best when **conversations are task focused** rather than exploratory
- However partnership practitioners in the field are finding ways to overcome the barriers to effective communication presented by remote partnering and are discovering that remote working can actually **improve partnership communications**.

20% say remote partnering is "always or often inadequate" and 80% say "has some advantages or provides rich opportunities"¹

Perceived challenges around communication:

- **Poorer quality dialogue** - a reduction in the quality of dialogue, the absence of opportunities for rapport building and reading of body language.

"we're all trying to squeeze in too much so skim read messages and listen superficially before making quick decisions"

"to achieve an open, unbiased and fair partnership between entities, and which sometimes requires the need to concede to the other, this requires ongoing dialogue and the establishment of a deep working relationship - doing this without being face to face can take more time and is more vulnerable to misunderstanding/getting at cross purposes"

- **Logistical barriers**- technology and time zone differences
- **Complexity of remote meeting facilitation**- equity, accountability, motivation

"Inclusiveness a major challenge - not forgetting remote participants, allowing space for introverts, understanding power dynamics"

"keeping everyone engaged requires time and energy"

Actions that have improved remote partnering communication

- **Strong virtual meeting protocols** - frequent scheduled meetings, meeting preparation, shared meeting facilitation roles eg. chairing/technology/minutes, participatory process during calls, sharing of group call minutes, sharing of bilateral conversation minutes.

"understanding socio-cultural sensitivities and core values of each and every partner are requisites for the broker to imbibe even before he starts partnership facilitation.."

"Ensuring explicit understanding and programming of virtual meetings"

"having skilled remote meeting operators separate to the chair of the meeting (separate computers)"

- **Opportunities for visual recognition** - use of video conferencing, finding ways to meet in person
- **Mixed communication types** - telephone calls, Visual calls, emails, informal & formal conversations, bilateral/group etc to deepen and add layers to the relationship.

"being careful to blend different methods for communications and exchange on a regular basis (formal and informal, bilateral, in groups,

¹ technical difficulties with the way this question was hosted on the surveymonkey platform were

email, phone, skype chat etc). A 'multi-layered' approach can help enrich a relationship that doesn't have the face-to-face dimension"

Communication platforms being used

- web based conferencing/voice and video platforms eg Skype, Zoom, Jitsi Viber, Adobe Connect, MS Lync, Facebook,
- email
- telephone
- Whats app and other phone messaging services
- File sharing eg Google docs/drive and Dropbox, also MS Lync
- Facebook, Twitter

Some conclusions re communication

- Whilst poor communication is seen as the main obstacle to effective remote partnering, there are ways being found to encourage higher quality dialogue.
- Getting the most from remote partnering entails a more structured and considered approach to interactions with partners.
- Meeting preparation and planning, good facilitation, shared responsibility for note taking and technical call hosting, timely and transparent sharing of minutes including of bilateral meetings - all help to ensure that virtual meetings are not a poor replacement to face to face meetings
- When remote partnering there is a clearer need for shared/collective partnership brokering skill within the partnership group.
- Remote partnering provides some unique opportunities for better dialogue and partnering

"Losing the face-to-face dimension can slow down the development of a relationship, but a remote relationship can make other dimensions more intense (e.g. listening, or having to write thoughts down by email) and therefore they can be more effective or powerful. It can help individuals from different backgrounds, different sizes of organisations, different levels of 'power' work on a level playing field (everyone has the same constraint or the same entry point)."

Some communication recommendations

1. Remote partnering is an explicit modality that needs to be designed and resourced from the beginning of the partnership

"spending time as part of the collaboration agreement together creating a space that is different from the remote partnering transactional dynamics, which allow for trust, setting the grounds, setting the frame of the collaborative endeavour. It may be a good idea for partners to co-jointly agree on what is their vision for remote partnering and set the ground rules etc..principles of partnership (and values) will probably mean a lot and somehow partners need to be clear on various fields of operation - what is transaction, what is innovation, what is capacity building, what is learning etc and how all of that may contribute to a wider change"

2. Structured and well-planned regular meetings

3. Using techniques for equitable meeting processes by those facilitating
4. Building a group culture of shared responsibility for brokering / building the partnership
5. Sharing the partnership brokering role will help improve remote partnering

Summary of responses

The globalized distributed workplace creates a need for partnering remotely:

"I do think that when people meet there is a connection that makes the partnership more personal which adds a richness to collaboration, communication and cooperation. However, in today's world, I do realize that much of our partnership work can and should be done remotely as this provides a much greater opportunity for organizations to collaborate."

"Overarching - in an international NGO it is simply 'normal' to work with colleagues and organisations around the world, and therefore impractical to work any other way than 'remotely' via Skype, emails and occasionally face to face"

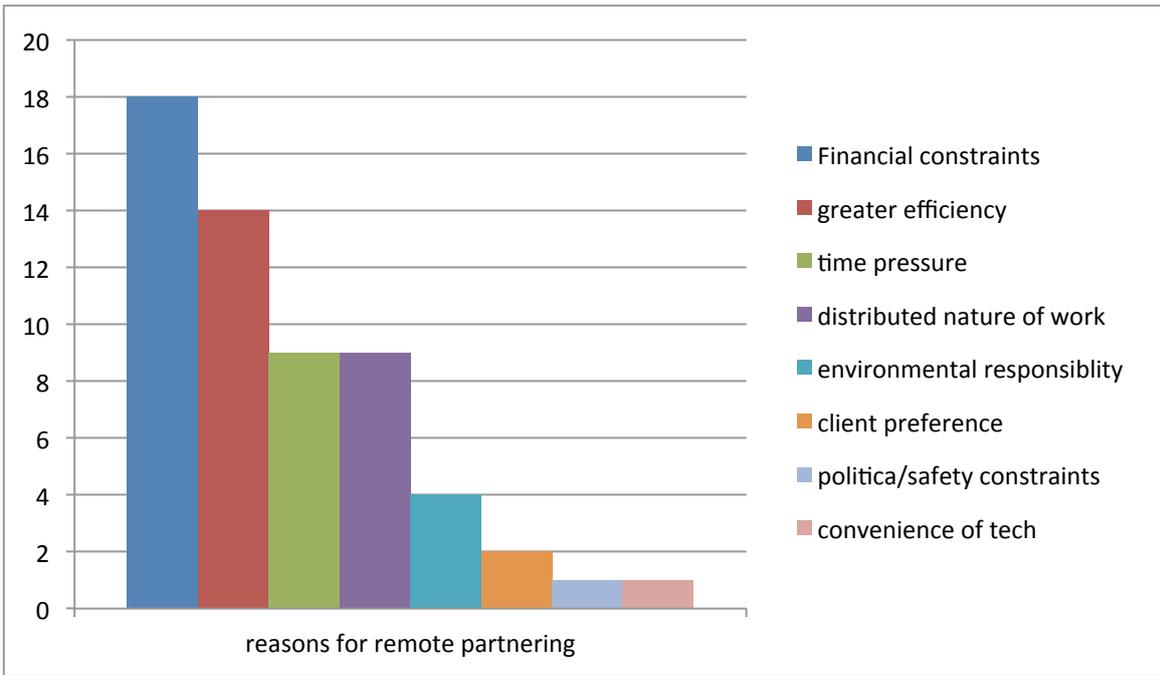
"It allows you to work with the most appropriate partner no matter where they are based."

Also inherently 'good' to work with so many sectors / languages / organisations such that everyone takes the experience and insight of others into their own work, despite practical difficulties"

The most popular drivers are financial constraints (76%) and greater efficiency (36%).

"Many of our partners are located around the USA, therefore, we will do much of our work through email, phone calls, or webinars. I am including financial constraints because that affects all of us, time pressure - sometimes there is a need to get something done quickly and working remotely is a means to get it accomplished, and greater efficiency because much of the work can be started and finished remotely. It is not necessary that we are face to face."

Reasons for working remotely (multiple responses per person):



In comparison to face-to-face partnering, remote partnering...

- is wholly/always inadequate – 4% (1)
- is often inadequate – 16% (4)
- has some advantages – 44% (11)
- provides different and rich opportunities for partnering effectively – 36% (9)

"Losing the face-to-face dimension can slow down the development of a relationship, but a remote relationship can make other dimensions more intense (e.g. listening, or having to write thoughts down by email) and therefore they can be more effective or powerful. It can help individuals from different backgrounds, different sizes of organisations, different levels of 'power' work on a level playing field (everyone has the same constraint or the same entry point)."

"I think it provides a good opportunity for partnering effectively but it needs more research, more testing of new approaches and far more dialogue on what it is than we have had to date. And, some better metrics so we can assess success."

"I do think that when people meet there is a connection that makes the partnership more personal which adds a richness to collaboration, communication and cooperation. However, in today's world, I do realize that much of our partnership work can and should be done remotely as this provides a much greater opportunity for organizations to collaborate."

Biggest challenges / most helpful enablers²

Biggest Challenges	Most helpful Enablers
A LOWER QUALITY OF DIALOGUE: less time, less attention, poorer dialogue, poorer understanding	FINDING MORE CREATIVE WAYS TO MEET
FEWER OPPORTUNITIES TO BUILD RAPPORT	IMPROVE VIRTUAL MEETING PROCESS AND BROKERING/FACILITATION ROLES
UNABLE TO READ BODY LANGUAGE	BETTER / DIFFERENT MEETING PREPARATION
TECHNOLOGICAL LIMITATIONS / POOR CONNECTIVITY	MORE FREQUENT & DIFFERENT FORMS OF COMMUNICATION <i>"keeping communications open and frequent but with purpose, contacting partners between meetings - again with purpose"</i>
TIME DIFFERENCES	VISUAL VIRTUAL MEETINGS
GENERALLY POORER COMMUNICATION	MORE TASK-FOCUSED CONVERSATIONS <i>"When we are focused on tasks this works well remotely. For example, partnership agreements can be passed around for comment. However, I have found getting on the phone and working through it together gets it done quickly and we can talk through questions"</i>
DIFFICULTY OF BEING INCLUSIVE / EQUITABLE	BUILD MORE CAPACITY ON THE GROUND <i>"Establishing critical friends network and mentoring a prospective local facilitator to assist the broker on the ground and provide timely feedback and initial analysis of the partnership."</i>
VIRTUAL COMMITMENT IS LESS STRONG <i>"Difficulty getting members of the team to commit to 'meetings' or to giving written feedback – seems that less priority is given to virtual projects/partnerships"</i>	MIXED COMMUNICATION TYPES <i>"Being careful to blend different methods for communications and exchange on a regular basis (formal and informal, bilateral, in groups, email, phone, skype chat etc). A 'multi-layered' approach can help enrich a relationship that doesn't have the face-to-face dimension"</i>
CULTURAL & LANGUAGE BARRIERS	SENSITIVITY TO DIVERSITY, MORE THOUGHTFUL FOLLOW UP AND RECORDS <i>"Well written summary of discussions circulated afterwards"</i>
COMPLEXITY OF VIRTUAL PARTNERSHIP PROCESS MANAGEMENT	

² Survey responses categorized into emerging themes in order of frequency of mentions

**PROJECT MANAGEMENT IS MORE
DIFFICULT FROM FAR AWAY**

**BEHAVIOUR CHANGE IN PARTNERING
DIFFICULT**

*"The partnering role may not achieve
the desired result especially in
developing countries where the culture
of partnering is still trying to find
itself"*

NO CHALLENGES

Top 10 recommendations from the survey respondees³

1. REMOTE PARTNERING AN EXPLICIT MODALITY THAT NEEDS TO BE DESIGNED AND RESOURCED FROM BEGINNING

*"spending time as part of the collaboration agreement together creating a
space that is different from the remote partnering transactional dynamics,
which allow for trust, setting the grounds, setting the frame of the
collaborative endeavour.*

*It may be a good idea for partners to co-jointly agree on what is their vision
for remote partnering and set the ground rules etc..principles of partnership
(and values) will probably mean a lot and somehow partners need to be
clear on various fields of operation - what is transaction, what is innovation,
what is capacity building, what is learning etc and how all of that may
contribute to a wider change"*

2. USE OF BETTER PROCESSES FOR BUILDING EQUITY EQUITABLE IN MEETINGS

*"Perhaps more use of innovative meeting mgmt approaches that seek to
reduce or minimise power differentials and build trust and equity"*

3. FACTOR IN SOME FACE TO FACE TIME

"Invest in face to face time at the start or near the start"

4. USE VIDEO/VISUAL CALLS

5. MORE FREQUENT INFORMAL COMMUNICATIONS

6. BETTER STRUCTURED AND PLANNED REGULAR MEETINGS

*"Structured and planned regular meetings, rather than fire-fighting with at
least annual, preferably by annual face to face at some level"*

"Keep the momentum moving, don't allow time lapses"

7. BUILD THE CULTURE OF SHARED RESPONSIBILITY EG FOR NOTE TAKING AND SHARING

*"bilateral conversation unless documented and shared create knowledge
gaps and a feeling of exclusion. So better email protocol"*

³ Survey responses have been categorized into emerging themes in order of frequency of mentions

"Develop a culture of note taking and sharing, having a more effective secretariat function (I spend too much time on that)"

8. FIND CHAMPIONS

"You need a champion / Exploring on-line opportunities (know there are some but have not used them)"

9. PARTNERING TRAINING

"Across the board partnering training"

10. DATABASE FOR CONTACTS

"Given the large number of partners I work with at multiple levels (HQ, field) it is necessary to have a good and up to date contact database, though it can be time consuming to manage"

11. DEVELOP PEER-TO-PEER COMMUNITIES OF PRACTICE

"More emphasis on people doing things together and working as peers"