2024 Leadership Programme

Strategy & People Action Lab 2 Report

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Table of Contents

03 — Introduction

04 — Action Framework

05 — Executive Summary

06 — Meeting 2

13 — Meeting 3

22 — Meeting 4

27 — Conclusion & Next Steps

28 — Acknowledgements

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Introduction

The Resource Alliance Leadership Programme 2024 was co-designed with the participants, based on an extensive consultation with and surveys of leaders across the sector, to ensure the content delivered on the ambition and priorities of the group.

The 2024 programme consisted of four full-group Leadership Summits and six smaller-group Action Labs addressing the topics our community of leaders told us mattered the most to them right now – Innovation, Strategy & People, Climate, and Shifting Power.

The Action Lab covered in this report is Strategy & People (Group 2). Over the course of the year, this group met four times online (2-hour meetings) and once in-person for those attending IFC 2024.

In the first Action Lab meeting, the participants used an online Miro board to share the areas of Strategy and People they would most like to tackle as a group, and then co-created an 'Action Framework' covering their Vision, Goals, Strategies & Measurements, which was then used to guide their work together for the rest of the year.

The next page of this document contains the full Action Framework co-designed by the Action Lab members in **Meeting 1**, then the remainder of the report details their progress in achieving the goals set at the start of the year.

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Leadership Programme 2024
Strategy & People 2 Action Lab

VISION - What is our shared dream?

Our vision is to cultivate a community of leaders equipped with the knowledge, tools, and support necessary to master strategic and people management challenges, leading their resource mobilization areas with clarity, direction, and resilience in an uncertain world.

GOALS
How do we make our vision concrete & measurable? How high do we set the bar?

Find, Share & Optimize Effective Strategy & People Management Models, Tools & Templates: Equip each member with the ability to clearly define and differentiate between strategy, culture, and business plans. Create a repository of shared strategies, structures, and team models that inspire & inform.

Produce Practical Tools and Resources: Develop and disseminate toolkits and templates (e.g. one-page strategy template, strategy & culture checklists) that aid in the practical application of strategic concepts. Also incorporate sharing and learning around the process of using these tools and resources

Foster a Culture of Continuous Learning and Support: Establish a robust support system that encourages ongoing dialogue and assistance among members, beyond the Labs

Document and Learn from pragmatic Applications: Compile case studies that highlight both successful and challenging strategy implementations to serve as learning tools for current and future leaders.

STRATEGIES
What important choices do we make to realise the vision?

Collaborative Learning and Sharing of models and tools out there:
Organize mini-lectures & discussions led by internal or external experts to deepen understanding of strategic and people management topics. Facilitate open sharing of experiences, best practices, and challenges to capture diverse insights and foster a learning environment.

Collect, share and disseminate learnings, expertise, models and tools from within the group:
Use brief surveys to collect information before sessions – stimulating the knowledge and expertise of the group.

Communication Tools between the sessions:
Implement effective communication tools (beyond email) to maintain engagement, such as a dedicated online forum or collaborative workspace.

MEASUREMENTS
How do we measure our progress once the action areas are identified?

Adoption of strategy models and tools

Adoption of people management models and tools

Member Engagement and Support:
Monitor the frequency and quality of interactions among group members, assessing the strength and utility of the support network.

Feedback and Adaptation:
Conduct regular check-ins and feedback sessions to gauge the relevance and impact of shared strategies and tools, ensuring they meet the evolving needs of the group.

Documentation and Reporting:
Produce session reports and a comprehensive year-end review that documents learnings, achievements, and areas for future development.

ACTIONS
Meetings scheduled to pursue goals

Action Lab Meeting 1
Wed 8 May
15:00 - 17:00 BST

Action Lab Meeting 2
Thu 20 June
15:00 - 17:00 BST

Action Lab Meeting 3
Thu 12 Sept
14:00 - 16:00 BST

IFC In-Person Meeting
TBC

Action Lab Meeting 4
Wed 20 Nov
14:00 - 16:00 GMT

Executive Summary

This report covers in detail how the members of this Action Lab achieved the goals they set themselves at the start of the year through their Action Framework.

On this page, we provide a quick summary of progress against each goal:

Goal 1: Find, Share & Optimize Effective Strategy & People Management Models, Tools & Templates
This goal was primarily achieved through the strategy case studies shared in the second meeting and covered on pages xxxxx of this report, and the case studies shared by members outside of this Action Lab in the third meeting, see pages xxxx

Goal 2: Develop and disseminate toolkits and templates (e.g. one-page strategy template, strategy & culture checklists) that aid in the practical application of strategic concepts.
This is an ongoing goal and the Lab will look to develop more practical toolkits, templates and checklists once this report has been circulated and feedback sought from a wider pool of leaders.

Goal 3: Foster a Culture of Continuous Learning and Support: Establish a robust support system that encourages ongoing dialogue and assistance among members, beyond the Labs
This goal was covered by every Action Lab meeting throughout the year - a deep culture of continious peer-to-peer learning and support was fostered in the Action Lab itself through how generously the Lab members shared (and challenged) with each other, and the dialogue beyond the Lab is particularly demonstrated by the external case studies shared in meeting three (xxxx)

Goal 4: Document and Learn from pragmatic Applications: Compile case studies that highlight both successful and challenging strategy implementations to serve as learning tools for current and future leaders.
This report itself is the culmination of the Action Lab's work towards this goal, and will be shared publicly in the Resource Alliance Global Community to be used as a learning tool for current and future leaders.

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Meeting 2 Agenda

Time	Focus
10 mins	Final amendments and updates to Action Framework
30 mins	Three different strategy models for nonprofits, including links to resources and templates, including examples: • Strategy map and balanced scorecard approach at Sightsavers [Damian] • The inclusive strategy at ICRC [Alessandro] • SDG programmatic approach used at Care International [Damian]
30 mins	Breakout groups to discuss efficacy of different models or approaches used previously: • Which models do you rate? • Are there other models you've used that you rate? • What do you like/don't like about your strategy (would you share your strategy) • What within strategy helps / hinders fundraising?
20 mins	Feedback from breakout discussions
15 mins	Open opportunity for sharing of any other Strategy Models
10 mins	Reflections and next steps

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Meeting 2 Outcomes

Case Study 1: Sightsavers Strategy
Presented by: Damian Chapman

Summary:
Damian introduced the Sightsavers strategy using a strategy map and balanced scorecard approach, which was adapted for non-profits by Bernard Ross of MC Consulting. The strategy map simplifies strategic planning by connecting organizational goals to operational outcomes through a structured framework.

Key Components of the Strategy Map:

- **Balanced Scorecard**: This approach includes four pillars:
  a. **Financial**: Ensuring sustainability and efficient use of resources.
  b. **Customer/Beneficiaries**: Meeting the needs of beneficiaries, in this case,
  c. providing quality eye care and education for the visually impaired.
  d. **Internal Processes**: Improving internal systems for better program delivery.
  e. **Learning and Growth**: Ensuring long-term development by investing in
  f. people and innovation.
- **Sightsavers' Four Strategic Aims**:
  g. Ensure **quality eye care** is universally available.
  h. Provide **quality education** for people with visual impairments.
  i. Promote **equality** for people with disabilities.
  j. Expand **eye care services** for all.

Implementation and Tracking:

- **Traffic Light System**: Sightsavers uses a real-time **traffic light system** to track progress across its goals, which is updated monthly on their website for full transparency.
- **Engaging Stakeholders**: The simplicity of the strategy map helps communicate the strategy to stakeholders and ensure alignment across the organization.

Challenges and Benefits:

- One challenge with the **strategy map** is the risk of creating a **generic** framework that could apply to any organization. To avoid this, it's essential to keep the organization's **unique mission** and goals at the forefront.

- However, the **focus** it provides helps avoid mission creep (where organizations expand into areas not aligned with their core mission) and allows for **consistent evaluation** of progress against defined goals.

Examples:
Damian gave an example of **Southwest Airlines** using a strategy map to transform from a struggling airline into one of the largest carriers in the US by sticking to a clear, focused strategy over 35 years.

Case Study 2: IFRC Strategy
Presented by: Alessandro Fedele, Strategic Partnerships and Resource Mobilization

Summary:
Alessandro shared his experience in developing a **global strategy** for the **International Federation of Red Cross and Red Crescent Societies (IFRC)**, which covers **191 national societies**. The aim was to create a strategy relevant to a vast, diverse network while maintaining inclusivity and local relevance.

Strategic Process:
- **Engagement and Consultation**: Before starting the strategy process, IFRC conducted a series of surveys and consultations with the national societies to gather feedback on what they expected from the global strategy. This ensured that the process was bottom-up and inclusive, not dictated by the central organization.
- A **General Assembly** was also held with **300 representatives** to further discuss and refine the strategy. This large-scale event allowed for collective input from across the globe, ensuring wide ownership of the strategy.

Challenges:
- Developing a **one-size-fits-all strategy** for such a diverse network was a major challenge. Alessandro pointed out that what works in one national society may not necessarily work in another. Therefore, the strategy had to be adaptable while still providing overarching guidance.
- The **previous strategy** (developed with the help of Bernard Ross) was reviewed to understand which elements worked well and which needed revision. Lessons learned from past experiences were crucial to shaping the new strategy.

Strategic Pillars:
- •The IFRC's strategy is built around three core pillars:
  a. **People at the center**: Ensuring the needs of the most vulnerable are addressed.
  b. **Institutional capacity-building**: Strengthening abilities of national societies.
  c. **Global impact**: Aligning local efforts with global humanitarian priorities.

Inclusivity and Adaptability:
- One of the strategy's key strengths is its emphasis on **inclusivity**, with **feedback loops** in place to ensure ongoing input from national societies as the strategy evolves. Alessandro stressed that the strategy is not static; it is meant to adapt over time as circumstances and needs change.
- The process was **highly collaborative**, aiming to ensure that the strategy worked for all members of the IFRC network.

Case Study 3: CARE International Strategy
Presented by: Damian Chapman

Summary:
Damian also presented CARE International's **programmatic strategy**, which is tightly aligned with the **UN Sustainable Development Goals (SDGs)**. This strategy is **global** in scope and uses a programmatic approach to tie local operations to global objectives.

Key Strategic Elements:
- **Alignment with SDGs**: CARE's strategy is aligned with specific SDG targets, allowing it to contribute directly to global development efforts in areas like **poverty reduction**, **gender equality**, and **climate action**.
- **Programmatic Approach**: The strategy links **country-level programs** to a global vision, ensuring that efforts on the ground contribute to broader organizational goals. This is a crucial element for ensuring coherence and unity across a wide geographic spread.

Strategic Goals:
- **Poverty Eradication**: CARE's primary goal is to reduce extreme poverty by promoting gender equality and social justice.
- **Capacity Building**: Empowering communities by improving local governance, building resilience to shocks, and promoting sustainable livelihoods.
- **Cross-Cutting Themes**: CARE's work focuses on several cross-cutting themes, including **climate change**, **humanitarian action**, and **women's empowerment**.

Measuring Impact:
- CARE uses **key performance indicators (KPIs)** tied to SDG progress to measure its impact.
- This allows for clear, measurable outcomes in areas like **reducing poverty** and **promoting gender equality**.
- A **balanced scorecard** approach is also used to track progress across different regions, with specific metrics tied to SDG targets. This ensures that progress can be evaluated consistently across the organization.

Implementation and Adaptability:
- **Global Coordination**: The programmatic approach ensures that all country offices work toward the same global goals while allowing for local adaptation.
- **Collaborative Decision-Making**: The strategy emphasizes **collaborative decision-making**, ensuring that regional offices have a say in how the global strategy is implemented on the ground.

- Damian highlighted that while **global coordination** can be challenging, it is essential for maintaining alignment and achieving CARE's strategic objectives.

Takeaway:

- The **alignment with SDGs** allows CARE to clearly demonstrate how its work contributes to global development goals, making it easier to communicate its impact to donors, partners, and stakeholders.
- The **programmatic approach** ensures that local efforts contribute to global goals, providing a cohesive framework for action across different regions.

Meeting 2 Visuals

What is a Strategy Map model?

A diagram that documents the strategic goals an organisation or management team pursues. It has emerged from the "Balanced Scorecard" approach to strategy devised by Robert S Kaplan and David P Norton in the US during the late 1990s.

The approach has four key attributes:

- an underlying framework of perspectives arrange in a cause-and-effect relationship;
- objectives within those perspectives;
- strategic themes that link the perspectives; and
- cause-and-effect relationship

Fundraiser In The Room

Brilliant Basics. What your fundraising strategy should really be focussed on.

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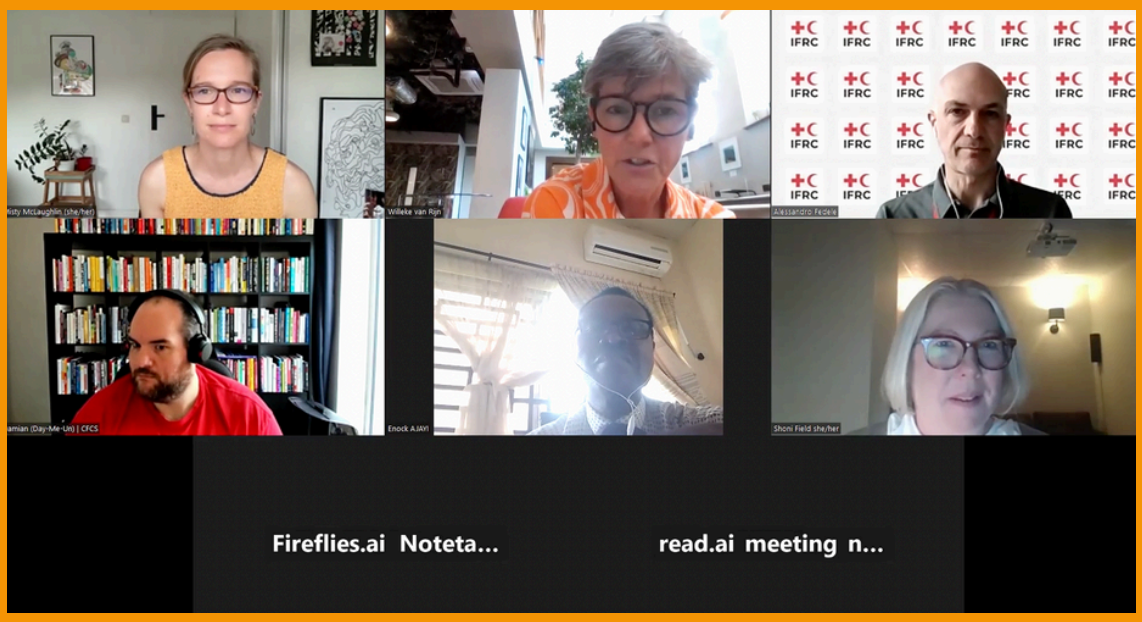

IFRC

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Be systematic
vs.
use fancy models

17 December 2024

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Meeting 3 Agenda

Time	Focus
45 mins	Case study sharing focusing on successful fundraising strategies, plus Q&A with wider group: 1. Ramses Man, Global Fundraising Director, AMREF 2. Emily Wigney, Head of Supporter Engagement, Oxfam Aus
45 mins	Organisational vs Fundraising Strategy: Provocation, review of survey responses, open discussion
20 mins	Wrap-up and next steps - IFC in October (inc. Open Discussion session), final meeting in November

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Meeting 3 Outcomes

AMREF Fundraising Strategy
Ramses Man, Global Fundraising Director

Ramses Man, the Global Fundraising Director at AMREF, delivered a presentation focused on how AMREF aligns its **fundraising strategy** with its overarching **organizational goals**. He discussed how AMREF's approach to fundraising is not just about securing financial resources, but about mobilizing a range of assets—including human resources, technical support, and strategic partnerships—to further the organization's mission.

Key Elements of AMREF's Fundraising Strategy:

- **Organizational Alignment**: Ramses emphasized that the **fundraising strategy** is deeply integrated into AMREF's overall mission and strategic goals. By aligning these two elements, the organization ensures that fundraising serves as a means to an end, rather than a standalone function. This approach helps ensure that every fundraising effort is directly tied to the impact AMREF aims to create.
- **Resource Mobilization vs. Traditional Fundraising**: Unlike traditional models of fundraising that focus primarily on securing financial donations, AMREF's strategy involves resource mobilization, which includes a broader range of resources such as:
  - **Financial support**: Securing donations and grants.
  - **Human capital**: Leveraging the skills and networks of AMREF's staff and supporters.
  - **Technical expertise**: Partnering with organizations that can offer technical support and services.
- This broader definition of resource mobilization allows AMREF to maximize its impact by diversifying the types of support it receives.
- **Team Effectiveness and Readiness Assessments**: Ramses shared insights on how AMREF conducted a **readiness assessment** across their global fundraising teams. This assessment aimed to identify gaps in skills, competencies, and effectiveness, ensuring that the organization's staff were well-prepared to implement the fundraising strategy. By identifying these gaps early on, AMREF was able to provide targeted training and development to enhance team performance.
- **Localized Approaches**: Given the global nature of AMREF's operations, Ramses

- explained that their fundraising strategy needed to be adaptable to different **local contexts**. While there is an overarching global strategy, each regional office is empowered to tailor its fundraising efforts to the specific socio-economic and cultural context in which it operates. This **localized approach** allows for greater flexibility and effectiveness in meeting fundraising goals.

Challenges Faced:

- **Global Coordination**: One of the major challenges Ramses discussed was ensuring effective **communication and coordination** between AMREF's global offices. Given the diversity of contexts in which AMREF operates, maintaining alignment across all teams can be difficult. However, Ramses emphasized the importance of ongoing communication and regular strategy reviews to keep everyone aligned with the organization's goals.
- **Skill Gaps**: Ramses mentioned that one of the key challenges identified in the **readiness assessment** was a lack of certain technical skills among fundraising staff, particularly in the areas of **digital fundraising** and **data analysis**. Addressing these gaps has been a priority for AMREF, with a focus on building capacity through **training programs**.

Examples of Success:

- Ramses shared a success story where AMREF was able to **leverage partnerships** with corporations and government agencies to secure not just financial donations, but also **in-kind support** and **technical expertise**. This holistic approach to fundraising has allowed AMREF to expand its impact beyond what would be possible through financial contributions alone.

Group Discussion and Q&A:

- **Effective Alignment**: The group found the integration between organizational and fundraising strategies impressive. Several participants asked Ramses how they managed to **ensure buy-in from various teams** across the globe. Ramses explained that it required continuous dialogue and local autonomy within a global framework.
- **Addressing Skill Gaps**: Ramses elaborated on the **team effectiveness assessment**, stressing that identifying and addressing **skill gaps** early on was crucial in optimizing team performance. He also emphasized the importance of regular **training** and **capacity-building initiatives.**
- **Leveraging Partnerships**: Ramses spoke about the importance of building **strategic partnerships** to diversify resources. These partnerships helped AMREF mobilize both financial and non-financial resources, ensuring a more sustainable approach to funding their initiatives.

Oxfam Australia Fundraising Strategy
Presented by: Emily Wigney, Head of Supporter Engagement

Summary:
Emily Wigney's pre-recorded presentation highlighted **Oxfam Australia's innovative approach to fundraising**, with a strong focus on **supporter engagement** and **digital transformation**. She emphasized how Oxfam has adapted its fundraising strategy to meet the changing expectations of supporters, particularly through the use of **digital tools** and **personalized communication**.

Key Elements of Oxfam Australia's Fundraising Strategy:

- **Digital-First Approach**: Emily explained that Oxfam has shifted towards a **digital-first strategy**, where most of their fundraising efforts are now conducted through online platforms. This shift was driven by the increasing importance of **digital engagement**, particularly among younger donors who prefer to engage with causes online.
- **Storytelling as a Key Driver:** One of the key elements of Oxfam's strategy is the use of **storytelling** to engage supporters. By crafting compelling narratives about the impact of their programs, Oxfam is able to create emotional connections with their supporters. These stories are shared across multiple platforms, including **social media, email newsletters**, and **virtual events**.
- **Personalization and Data-Driven Engagement**: Emily emphasized the importance of **personalized engagement** in Oxfam's fundraising efforts. Using **donor data**, Oxfam is able to segment its supporters based on their interests and past giving behavior. This allows them to tailor their messaging to each supporter, increasing the likelihood of continued engagement and donations.
- **Virtual Events and Interactive Campaigns**: One of the successful initiatives Emily shared was a **virtual event series** that Oxfam organized as part of its fundraising strategy. These events not only raised funds but also provided an opportunity for supporters to learn more about Oxfam's work and participate in interactive sessions. This approach helped create a sense of community among supporters and deepened their connection to the cause.

Challenges Faced:

- **Digital Fatigue**: Emily acknowledged that **digital fatigue** has become a challenge, especially during the pandemic when supporters were inundated with online content. To address this, Oxfam has focused on creating **interactive experiences** that engage supporters in more meaningful ways, such as **gamified experiences** and **live virtual events**.

- **Maintaining Donor Trust**: Another challenge Emily highlighted was the importance of maintaining **donor trust** through transparency. Oxfam is committed to providing clear information about how donations are used and the impact they are having. This transparency helps to build long-term relationships with supporters and encourages continued giving.

Group Discussion and Q&A:

- **Digital Innovation and Lessons Learned**: The group found Emily's use of **digital innovation** particularly inspiring, and many participants asked her how they could incorporate similar strategies into their own organizations. Emily suggested starting small with **test campaigns** to see what resonates with their audience and using analytics to refine strategies over time.
- **Long-Term Supporter Engagement:** Several participants asked how Oxfam manages to keep donors engaged over the long term, particularly in a highly competitive landscape where many organizations are vying for attention. Emily emphasized the importance of **constant communication** and **personalized touchpoints** to make supporters feel connected to the organization's mission.
- **Overcoming Digital Fatigue:** One challenge discussed during the Q&A was how to avoid **digital fatigue** in supporters. Emily responded that finding **new, creative ways** to engage supporters—such as gamification, live events, and **interactive storytelling**—has helped mitigate this issue.

Organisational vs Fundraising Strategy
Leadership Programme-wide Survey

Introduction :
The survey sought to explore the hypothesis posed by the Strategy & People Action Lab Leaders:

"There is a good body of knowledge, methodologies, and a plentiful selection of examples related to organizational strategy design, implementation, and success measures. However, the same cannot be said for fundraising or income generation strategy. Fundraising strategy development could be improved by adding to the body of knowledge and providing examples of fundraising strategies and their associated organizational strategies and success measures."

24 members of the Leadership Programme responded to his survey, providing critical insights into the relationship between organizational and fundraising strategies, the gaps and overlaps between the two, and the opportunities for improvement.

Organizational Strategy - Findings and Analysis:

Prevalence and Familiarity
- All respondents indicated the existence of an organizational strategy.
  - Clear familiarity: 58% (14 respondents) could provide a summary from memory.
  - Partial familiarity: 42% (10 respondents) had read it but would struggle to summarize.

Recency of Updates
- Recent updates (within 3 years): 75% (18 respondents)
- Older updates (5+ years): 8% (2 respondents)

Extent to Which It Drives Work
- Average score: 7.8 (on a scale of 1–10)

Implications for Hypothesis
The strong alignment between organizational strategies and work outputs supports the hypothesis that organizational strategy development is generally well-established. The high familiarity and frequent updates indicate robust methodologies and practices for organizational strategy design and implementation.

Fundraising Strategy – Findings and Analysis:

Prevalence and Familiarity

- While 22 out of 24 respondents (92%) confirmed the existence of a fundraising strategy, familiarity varied:
  - Clear familiarity: 58% (13 respondents) could provide a summary from memory.
  - Partial familiarity: 33% (8 respondents) had read it but would struggle to summarize.
  - Unawareness or absence: 8% (2 respondents)

Recency of Updates

- Recent updates (within 3 years): 79% (19 respondents)
- Older updates (5+ years): 8% (2 respondents)

Extent to Which It Drives Work

- Average score: 7.9 (on a scale of 1–10)

Implications for Hypothesis

While fundraising strategies exist in most organizations, the variability in familiarity and influence suggests a less integrated and systematic approach compared to organizational strategies. This aligns with the hypothesis that there is a gap in the body of knowledge and practices for fundraising strategy development.

Relationship Between Organizational and Fundraising Strategies

Integration Challenges:

- Many respondents highlighted a disconnect between organizational and fundraising strategies:
- Fundraising strategy is often treated as an afterthought or siloed effort rather than being embedded in the organizational strategy.

Complementary Nature:

- Respondents in more integrated organizations described their fundraising strategy as an enabler of organizational goals:

Strategic Alignment:

- Several responses emphasized the importance of aligning fundraising strategies with broader organizational goals:

Need for Greater Deliberation:

- Some respondents noted that their fundraising strategy lacks the same level of deliberation, methodology, and sector-wide examples as their organizational strategy.

Conclusions

1. **Organizational Strategies Are Well-Established:** The data supports the premise that organizational strategies are widely understood, updated frequently, and effectively drive work. This reflects a robust body of knowledge and methodologies.
2. **Fundraising Strategies Lack Consistency:** While most organizations have a fundraising strategy, the variability in familiarity, influence, and integration highlights a need for better practices and resources.
3. **Disconnect Between Strategies:** Many organizations struggle to align fundraising strategies with organizational strategies, treating them as separate efforts rather than integrated components.

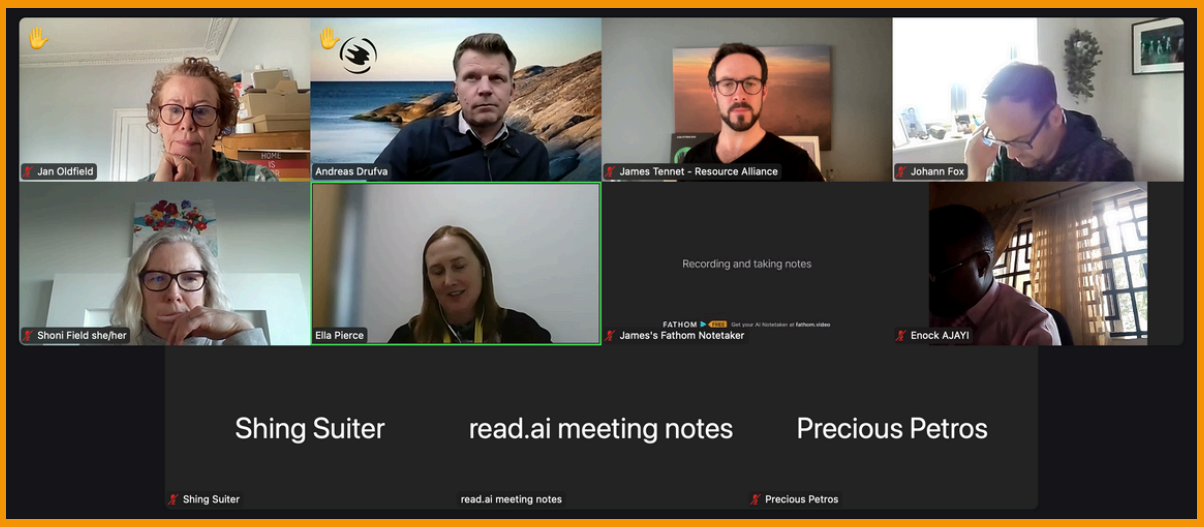
Implications for Hypothesis:

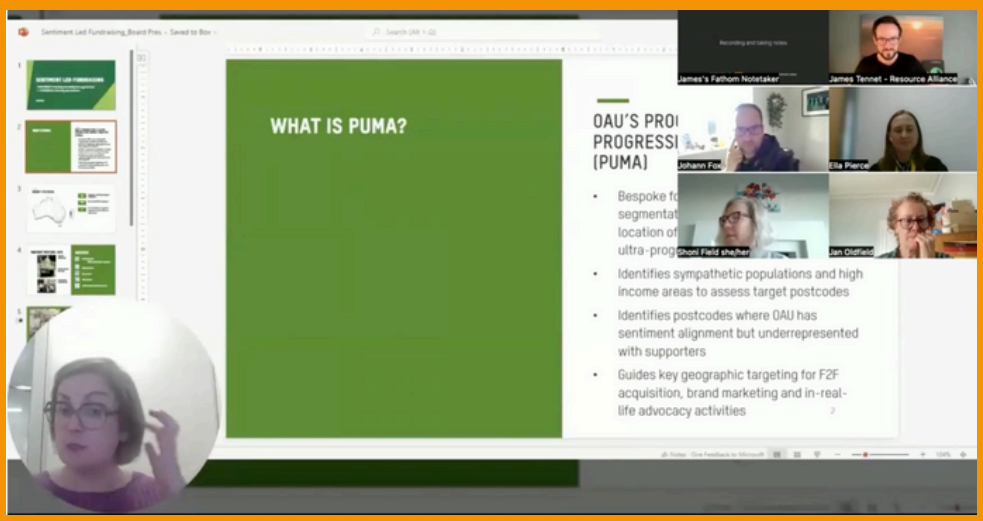
These findings provide some support for the hypothesis. While some organizations have successfully aligned their strategies, many highlight a need for better integration, strategic alignment, and shared responsibility across teams. While the hypothesis assumes a lack of knowledge and examples specifically for fundraising strategy, the responses suggest deeper systemic issues:

- Some respondents stated that organizational strategy and fundraising strategy are "effectively one and the same," especially in foundation contexts, implying that the problem may lie more in implementation and integration than a lack of methodologies or examples.
- A significant number of respondents already recognize the interdependence of the two strategies, suggesting that practical barriers, rather than knowledge gaps, are the real challenge.

The responses reveal deeper structural and cultural issues, such as the under-prioritization of fundraising strategy, its limited integration into organizational strategy, and siloed communication between teams. These challenges may not directly support the hypothesis that the primary issue is a lack of methodologies and examples for fundraising strategy. Instead, they point to a need for greater strategic alignment, leadership engagement, and systemic prioritization of fundraising within organizations.

Meeting 3 Visuals





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Meeting 4 Agenda

Time	Focus
20 mins	Recapping developments from IFC – key findings, surprises, any next steps?
40 mins	Open discussion/debate on *Mastering the connection between strategy & culture*
10 mins	Reviewing our progress this year against the Action Framework
20 mins	Final thoughts, thank yous, next steps

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Meeting 4 Outcomes

Strategy & Culture Discussion

Context:
The Lab Members had indicated their desire to discuss some more people-orientated elements in their final meeting, given that business strategy had dominated previous conversations (and this Lab was meant to cover both strategy *and* people). In order to prepare for this conversation, the group had a PWC article to read - Mastering the connection between strategy and culture.

The resultant discussion in the meeting explored the intersection of strategy and culture in organizations, emphasizing their distinct definitions, relationships, and implications for nonprofit operations.

Key Themes and Takeaways:

1. Definitions of Strategy and Culture:

- **Strategy:** Seen as a forward-looking map or guiding star, encompassing the choices and priorities that shape an organization's path. It defines what needs to be done to meet the diverse needs of stakeholders (e.g., communities, beneficiaries, employees, supporters).
- **Culture:** Described as the organization's "operating system," composed of self-sustaining behaviors, emotions, and beliefs. It is less formalized than strategy and deeply influences how work gets done and how people feel about their roles and environment.

2. Definitions Interrelationship Between Strategy and Culture:

- Participants recognized that while strategy sets direction, culture drives the implementation. A strong alignment between the two is essential for success.
- The metaphor of culture as an "invisible program" running behind the scenes resonated, highlighting its role in unifying people and processes.
- Many organizations struggle to distinguish whether their challenges are rooted in strategy, culture, or both.

3. Culture as the Foundation for Strategy Execution:

- Culture was described as the "glue" that holds strategy together. Even the most visionary strategy can fail if it does not align with the prevailing organizational culture.

- Participants emphasized that culture isn't just a background element—it actively influences decision-making, team dynamics, and the interpretation of strategic priorities.
- One member mentioned, "Culture eats strategy for breakfast," highlighting that ignoring cultural dynamics can derail even the best-laid plans.

4. Challenges in Aligning Culture with Strategy:

- **Resistance to Change:** When strategies demand significant shifts in behavior or processes, entrenched cultural norms often create friction.
- **Leadership Disconnect:** A recurring issue is when leadership assumes the culture is one way (aligned with their vision) while employees experience it differently. Misaligned perceptions can lead to disillusionment and lack of engagement.
- **Global vs. Local Contexts:** In multinational organizations, aligning culture with strategy becomes even more complex. Local teams might resist strategies perceived as irrelevant to their specific needs or contexts.

5. Culture as a Strategic Lever:

- Culture was reframed as a tool that leaders can actively shape to better support strategic goals. For example, cultivating a culture of transparency and adaptability can help employees embrace change more readily.
- The group discussed the importance of storytelling in embedding strategy into culture. Stories of past successes, particularly those tied to organizational values, can create an emotional connection to strategic goals.

6. Practical Steps for Integrating Culture into Strategy:

- **Listen First:** Leaders should spend time understanding the current cultural climate through surveys, focus groups, and informal conversations.
- **Bridge the Gap:** Where cultural barriers exist, participants suggested targeted interventions such as leadership training, team-building exercises, and highlighting early wins.
- **Celebrate Cultural Strengths:** Organizations should identify elements of their culture that already align with the strategy and amplify those traits. For instance, if collaboration is a strength, tie strategic goals to cross-departmental initiatives.
- **Local Ownership:** Encourage local teams to take ownership of implementing strategy in culturally relevant ways, while maintaining alignment with overall goals.
- **Integration**: Participants suggested that culture should not be treated as a separate element from strategy. Instead, it needs to be integrated into the strategic planning process from the outset.
- **Lens**: One participant noted that culture should act as a "lens" through which strategic decisions are evaluated to ensure that they align with organizational values and employee expectations.

7. Embedding Culture into Strategic Processes:

- Participants debated whether culture should be a separate focus in strategic planning or integrated as a guiding principle across all planning stages. The consensus leaned toward the latter, with culture acting as a lens through which strategic decisions are made.

Immediate Actions and Next Steps:

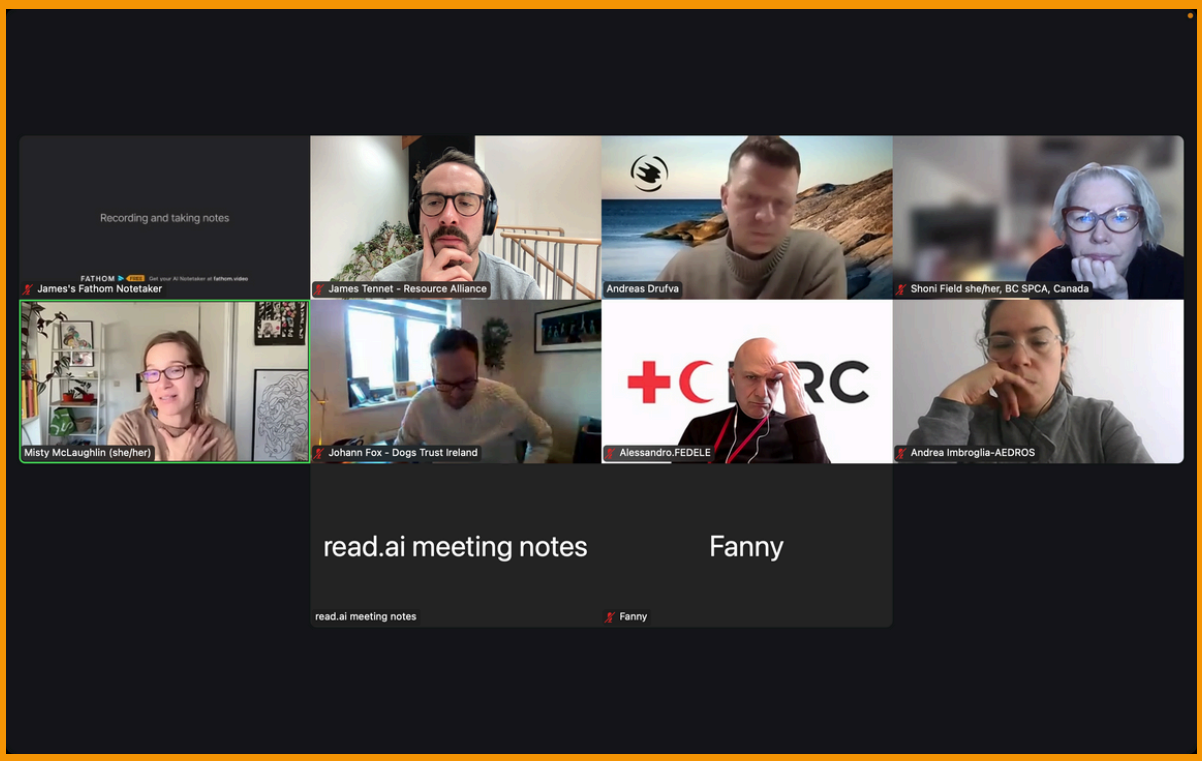
Encourage Inclusive Strategy Development:

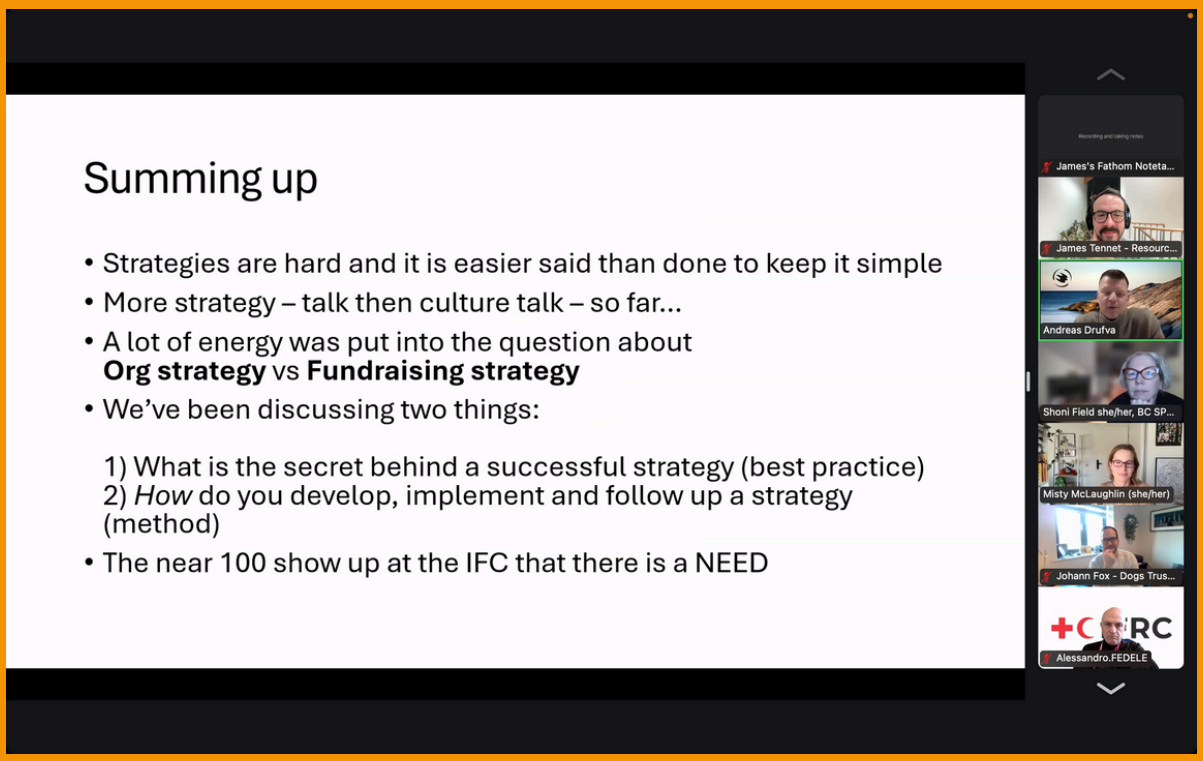
- Advocate for participatory approaches in strategy-making to ensure alignment with organizational culture and stakeholder needs. Participants agreed that inclusivity must be embedded into the organizational culture to create a sense of belonging, especially in diverse teams. They discussed how this enhances the successful implementation of strategy by ensuring every team member feels valued.

Explore the Strategy-Culture Nexus:

- Facilitate further discussions or workshops on how to effectively integrate cultural considerations into strategic planning.

Meeting 4 Visuals





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Conclusion & Next Steps

This Strategy & People Action Lab has made substantial progress toward the ambitious goals set at the beginning of the year. Through a series of collaborative sessions, case study reviews, and insightful discussions, the Lab has delivered valuable tools, knowledge, and strategies for advancing strategic and people management practices in the nonprofit sector.

This Lab successfully met its goal of fostering a culture of continuous learning and support, establishing a trusted space for nonprofit leaders to share challenges, solutions, and ideas. The collaborative spirit among members not only enriched the Lab's discussions but also built a strong network of peers committed to mutual growth and innovation.

The Lab's exploration of case studies such as Sightsavers, IFRC, CARE International, and insights from guest contributors Ramses Man and Emily Wigney demonstrated diverse approaches to integrating strategic alignment and cultural adaptability. These examples provided actionable frameworks and sparked thoughtful discussions on navigating the complexities of strategy in nonprofits. Furthermore, the final meeting's focus on the intersection of strategy and culture underscored the importance of aligning organizational direction with cultural values to achieve meaningful impact and keep your people onboard!

While the Lab has concluded for this year, its work and legacy will continue. The practical tools and resources envisioned at the start of the year, such as strategy templates and checklists, remain a priority for further development. These tools, informed by this report and feedback from the Resource Alliance community, will empower leaders to apply the Lab's learnings in their organizations.

By sharing the lessons, case studies, and outcomes from this year's work with the wider nonprofit community, the Lab ensures its contributions will resonate beyond its members. The Strategy & People Action Lab has laid a solid foundation for advancing inclusive, adaptable, and impactful leadership practices in the nonprofit sector.

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