Leading Together 2022
The meeting of Human Resource, Policy/Advocacy and Programmes Directors

6 July 2022

Date:	28 – 30 June 2022
Venue:	Online - Zoom

Outcome

Leading Together 2022 once again convened Global Heads of HR, Policy/Advocacy and Programmes of international civil society organisations (ICSOs) for high-level strategic discussions on joint challenges, global trends, and best practices.

Content

Joint SessionsAll participants explored 'leading new leadership in a changed world', hearing insights and ideas from ICSOs and external speakers on experiences innovating organisational change, or on the influential drivers transforming the civil society sector and world of work at large.

'Navigating new realities of leadership in a changed world'

Three organisations working on different leadership transformations shared their experiences, with perspectives represented for HR, Programmes and Policy/Advocacy.

'Unplugging the Centre' for more dispersed leadership at VSO

Kathryn Gordon, Executive Director, People and Organisation Development, explained how over the past five years, VSO has been 'unplugging' from a traditional headquarters in London, UK, and finding a different 'power source' for their work, organising more effectively around a global portfolio of work. A small executive team has been operating virtually since 2016, with a wider strategic leadership group developed of 14 people in nine different countries around the world, who come together to apply their functional or operational experience to the strategic thinking of the organisation. This group has developed the latest operational plan which will run until 2025.

Everything is run through a global delivery model and implementation team so there are no country director roles, with teams instead configured to deliver on a particular grant or project in a particular location. There are also no 'advisory' roles anymore - people are instead accountable for global process and expected to 'listen, learn and absorb' what could be relevant across the global portfolio of work. New work is being designed with a small project management team of VSO staff and a bigger blended team of different types of volunteers for delivery.

There has been fear through designing dispersed leadership and these new accountability models, but confidence in the strong purpose and direction and a will to make it work have helped move through challenges. Mindsets have been the enablers or blockers - where people can think about what else is possible, barriers and resistance have been overcome, but where not, this has led to formal restructures, redesigning jobs and redundancy. The staff headcount has reduced from 750 to 500 and income shifted from GB£65 to £30 million in the last three years, but VSO has increased by over 100% the number of people they have been able to reach – which will be more than 12 million this year.

Creating adaptable teams means everyone has to work out how to be a leader, at the time, in their job; this is very different from being an operational manager. It has been important to help leaders recognise their role as influencers and connectors in a global organisation to role model how to share information, in driving innovation or 'intellectually stimulating' others to think about doing things in new ways, and also being able to inspire and motivate others when feeling uncertain or vulnerable themselves. Leading through uncertainty and change will take a toll on individual leaders, but being able to show vulnerability about this brings strength to other people. Kathryn also shared her wisdom on navigating change: 'It's not going to stop, there is no end date and we're going to have to continue to keep adapting'.

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Resources

- [Creating Adaptable Teams by David Webster](#) has been part of the coaching and accompaniment resources available to VSO leadership.
- [Leading Strategy as a Journey of Not Knowing](#) (45 mins) interview with VSO's CEO Philip Goodwin

Feminist and intersectional leadership experiences at Oxfam International and Plan International

Lydia Zigomo, Oxfam International's Global Programs Director, and two colleagues from Plan International, Anne-Sophie Lois, Senior United Nations Representative (New York and Geneva and Soumya Guha, Plan International's Director of Gender Transformative Policy and Practice, shared their experiences on feminist and intersectional leadership principles.

On positioning the feminist leadership principles
Both Oxfam and Plan have commitments to feminist leadership principles embedded in their new/recent strategic frameworks. For both, their approaches have evolved over time into intersectional feminist thinking.

Oxfam started with looking at how feminism was influencing their leadership principles, as a key missing piece from their 'moment of reckoning' following the Haiti safeguarding revelations in 2018. There has since been a widening to adopt intersectional feminism, and the power, discrimination and oppression aspects of colonialism and racism have become even more explicit. Different groups internally have advocated for more specific attention to different lenses and lived experiences within the broad-based intersectional feminist approach, such as race, decoloniality, disability and mental health, LGBTQI, but it has been able to bring together the breadth of these interests. Informal internal conversations and activism have pushed the leadership further. For instance, it led to stronger wording around patriarchy, colonialism, decoloniality, racial justice and sexism in the 2030 strategy (launched in 2020).

At Plan, putting feminist leadership principles into practice connected directly to Plan's changed strategic focus on gender justice and transformation from 2017. All 70+ national directors came together in a workshop to explore what internal behaviours needed to change to bring the strategic change about, which is where the feminist leadership principles were embraced. This created a 'critical mass' of senior leaders who were clear on what needed to happen and the connection with strategy. Power and privilege conversations and training were already happening in Plan before the anti-racism movement in 2020, then the accelerated anti-racism work merged into that (anti-racism council, agenda, roadmap – see HR group summaries), and has now also evolved into an intersectional feminism approach including age, class, disability, etc.

Anne-Sophie shared how the early adoption of an intersectional lens in Plan's UN team strongly benefitted their external policy work and action. They needed to talk in a different way about age, gender and diversity otherwise they found UN member states were 'not interested', and it has been a big enabler for many successes, including:

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- Influencing the Global Refugee Compact to include language around age, gender and diversity, an [age, gender and diversity (AGD) tip sheet with UNHCR](#) on programmes and policy work,
- training diplomats and developing the 'Language Matter' toolkit to help progressive member states bring gender-transformative language into policy spaces,
- and a creating a ['safe space' conversation on intersectionality](#) at the [International Gender Champions](#) Network of UN, ambassador and civil society leaders.

Plan has recognised that feminism is perceived differently in different parts of the world, but the key has been to be as simple as possible, and not to get too hung up on the words and phrases you are using. Soumya put it succinctly – as a leader, 'if you believe that there has been centuries of oppression of women and girls and that this needs to be corrected, and for that you need to challenge patriarchy, then you are a feminist'.. Plan has found that if you allow people to understand the concept as it relates to their context and engage them in dialogue and discussion, they go further than what you initially thought possible. Especially when they are asked to envision what benefits are in store for them in a world of gender equality and justice. Plan has also recently developed a new internal vocabulary through an 'equality glossary'.

On balancing organic/informal and formal leadership
Both organisations described formal and informal spaces to encourage the collective wisdom to be shared 'horizontally' between colleagues – as many lived experiences of how to make change happen already exist at the individual and team level – as well as challenge and inspiration from external voices. The role of leadership is to carefully create and protect these spaces and make sure there are mechanisms to connect them to the more formal change processes. Lydia shared her wisdom on not over-controlling spaces and not over-promising on speed of delivery of change, but being open to being challenged about how far to go on the journey, laying out a process for what ideas you will be able to take on board and how, and consolidating and share back to check whether you are hearing and understanding correctly.

There was an organic, internal movement in Oxfam during the year of discussion at senior levels before the collective leadership formally adopted the feminist leadership principles. A number of regions and teams took on the principles earlier and began to unpack them in informal spaces to interrogate their own mindsets and behaviours against them. Later on, the (internal) Gender Justice Network ultimately defined the framework in Oxfam terminology. These spaces have influenced proposals and introduced diverse inputs, such as new policies on care, and issues related to LGBTQI, especially transgender, and decoloniality/racial justice being strengthened in policy updates.

Oxfam's experience is that these spaces need to be mediated by skilled facilitators to ensure that the rules of engagement are clear and no one feels violated by the conversations, especially where some people do not yet have the right language and tools to engage in an affirming, positive, respectful way. Anne-Sophie from Plan also stressed the role leaders have in ensuring that conversations are held in a way which is empathic and with mutual respect, and which 'challenge the issue and not the individual'.

More formal spaces for conversations at Oxfam with leadership sponsorship included:

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- A 21-day racial justice challenge, with people reading different resources and meeting to discuss in global webinars, also hearing from different external experts e.g. challenging Oxfam on how to show up or partner with a truly a decolonial version of feminism
- A *baraza* (from Swahili) open public space with volunteers from across the confederation to facilitate safe discussions on issues of diversity, inclusion, discrimination and power

Lydia highlighted the need to balance the energy of 'usual suspects' - without them dominating the space - and actively finding and amplifying the less visible, who are quietly doing interesting things.

In Plan, there have been 'feminist labs', safe spaces for dialogue and ideas, women's leadership forums, where women leaders mentor other women, and 'men for gender equality' groups in some of the offices. Anne-Sophie also shared how the UN team decided they need to change, as they felt comfortable talking about diversity, but not race. So they worked with '[Me and White Supremacy](#)' by Layla F. Saad, a 28-day an anti-racism education workbook which unpacks key terms like white fragility, white supremacy, to start challenging your own biases and ways of talking and acting. The team spent 1.5 years working through it together, creating safe spaces for discussion and understanding with no judgement, and did internal trainings on power and privilege and anti-racism.

On encountering resistance

There are no clear-cut indicators or milestones of change, but the fact that you are generating discomfort and encountering resistance is a signal that you are 'doing it right', and you need the courage and vision to continue on the journey. There will be push and pull, some people will take offence or not like being challenging, others may be frustrated by slow pace of change, and you have to be able to carry them all along. As resisters present challenges and barriers, it forces you to engage on why, understanding their reasons and how to influence and support them on the change journey. This internal 'microcosm' also generates important lessons for how to address resistance in wider society. Leaders also need to help other groups understand that the context means speed of change can be faster in some areas than others, in some parts of the world working more explicitly on these power issues can create risks for staff and there are duty of care considerations.

On formalising accountability

Both Oxfam and Plan now have changed recruitment and leadership performance measurement and recruitment to emphasise values-based behaviours. At Plan, 50% of leadership performance measurement now depends on demonstrating how you are embracing the values of Plan and its feminist leadership principles. For instance, a key result area for all national directors is about how you are developing a more inclusive organisation in their area of responsibility. Performance/promotion will look at how leaders have actively developed other leaders. Oxfam's performance appraisal system has also changed to emphasise feminist leadership behaviours and values, including 360 feedback on how you work with, empower and include others. This has involved changing mindsets from what is considered success. Leaders are also reflecting on power and privilege in their own roles and thinking through how they can step back and create greater space for others to rebalance power dynamics and share power with colleagues in

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different ways. For instance, giving up spaces for other younger colleagues to speak or moderate in UN spaces.

Both organisations have also changed recruitment and hiring process to be explicit about what they are looking for in role profiles, and a 'minimum threshold' to probe in interviews, along with strong orientation processes for new starters.

On transforming other support systems

Organisational culture, safeguarding and broader discussions about power in Oxfam have led to work to transforming business support systems and operational processes which can also act to reinforce unequal power. For instance, Oxfam's partnership processes have moved from 'assessment' to a dialogue around health and mutual agreement of benefits, so the very way of entering into partnership reflects more feminist ways of thinking. It is about the quality and equality of the relationship from both sides, not just about increasing the quantity of partnerships (e.g. number of women's rights organisations). Other existing Oxfam processes like regular integrity reports have moved beyond safeguarding to capture and monitor cultural dimensions, along with expert advice on culture questions for the global employee engagement surveys.

Resources available from Plan

- 'Advancing Values-Based Leadership through Courageous Conversations': Leader's Guide – practical tool to help conversations with yourself or your team around feminism, etc.
- 'Welcome to the Plan International Leadership Tool' – five stages of leadership, where the final stage is thinking about change outside, rather than within, and feminist leadership
- Values Framework and Anti-Racism and Equity Vision and Principles
- Age, Gender and Diversity Tip Sheet developed by Plan, UNHCR and others
- 'Positive first Time to Talk Conversation on Intersectionality' developed for the International Gender Champions leadership network

Common leadership takeaways

Leaders needs to be courageous and visionary to go on the journey and embrace discomfort, and persistent and motivational so people don't feel overwhelmed by too much change. New people will come into the organisation attracted by the vision and focus, bringing new motivation and energy to you and others.

There is no end to change and the expectation needs to be constant adaptation. Firstly, as you push boundaries, deconstruct and build back in more equitable ways, you will keep having to move to newer levels. As Lydia puts it: 'we're going to continue to peel this onion, and it's an endless onion'. Secondly, the world around is continuing to change and what it expects and demands of ICSOs means we must continue to change to remain relevant.

A lot of work is still needed with donors and the public to hold the lines needed to be true to these new values, along with more conversations around the right kind of model for a truly international CSO in the coming times.

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Sustainable leadership and cross-sector partnerships

In this session, Max von der Planitz and Simon Kingston from Russell Reynolds Associates (RRA) shared key leadership findings from RRA's recent analysis from the commercial sector. The opportunity exists for the social sector to leverage a generation of commercial leadership who understand the benefits of partnering with mission-driven organisations and have sustainability mindsets. But both the private and social impact sectors will benefit from greater cooperation when partnerships go beyond funding.

RRA's 2022 Global Leadership Monitor analysis of 20 external factors impacting organisational health across the next 12-18 months – based on interviews with 1,590 global executives – identified three main threats: firstly talent/skill shortages, then economic uncertainty and geo-political risk. 72% of leaders cited the availability of key talent/skills as a top 5 threat to organizational health over the next 12-18 months, a rise of 13 percentage points from 2021. Employees, after customers, are seen as the second largest stakeholder group for impact on an organization over the next five years, a perception which has also grown significantly from 2021 (a rise of ten percentage points). The discussion highlighted that finding suitable opportunities to engage private sector employees driven by purpose motivations/social goals is important – e.g. youth skills mentoring/employability or in-kind talent exchange.

Sustainability is a leadership imperative for the long-term viability and success of an organisation. RRA's study with the UN Global Compact on 'Leadership for the Decade of Action' set out to determine how organisations can make sustainability core to the DNA of their leadership teams. They interviewed 55 CEO and Board Member sustainability pioneers, and 12 subject matter experts. They identified four key elements of a sustainable mindset, defined as a 'purpose-driven belief that business is not a commercial activity divorced from the wider societal and environmental context in which the company operates'. The four key elements are multi-level systems thinking, long-term activation, stakeholder inclusion and disruptive innovation.

These recent changes in private sector leadership attitudes towards sustainability have prompted many social sector leaders to ask: what if companies mean it this time? More values-led conversations and competency conversations in the ICSO sector as well (as we are seeing at this event) may also open up new avenues for collaboration. However, several organisational culture and capability mindsets and structural barriers must be addressed needed to ensure the ongoing clarity and delivery of the specific value proposition of any partnership. Mindsets need to shift at culture level - establishing cooperation as a partnership of equals not competitors - and at capability level - shifting the relationship to the private sector from "cash" to "capability". Key cultural barriers include: cultural mismatch regarding ways of working and making decisions, competitive approach among partners and peers, and lack of trust and suspicion about motive.

Some steps social impact organisations can take to improve their culture and capability for successful partnerships with the private sector were highlighted in the discussion:
- There is a need for a more structured, strategic approach to private sector partnerships. Articulating benefits of partnerships and f**raming the narrative at the strategic level is important.** Focus on the **structure of partnerships** and embedding **governance** and decision-making mechanisms to monitor and evaluate partnership goals is also needed.

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- **Opportunities for collaboration must align to the mission** and **communicate benefits** to the organisation in order to generate buy-in, being very clear on the value proposition and definition of outcomes.
- **Compatibility of values and ethical standards** are more important than ever, and ensuring congruence between interests, goals and culture at the start of the partnership with **brutal honesty** on both sides, as well as **mutual tolerance** of different perspectives which may emerge on the same target as the partnership progresses.
- Ethical 'vetting' requires a lot of time and resources pre-partnership and the process may be prohibitive for smaller social impact organisations. Referring **to independent third-party organisations which carry out certification** as their core purpose – such as industry-specific bodies or the UN Global Compact – may help with this.
- Fostering a **culture of trust and positivity** towards partnerships is needed, particularly if there is skepticism towards collaboration with the private sector. Organisations should r**eview the skills needed in teams and consider crossovers** and engage employees who can 'speak the language' of both commercial and social impact interests.
- Starting '**small in scale and specific in scope'** was also one of the success factors for partnerships highlighted in the discussion groups. The different challenges between 'global' and 'programmatic' partnerships were also raised, with success more common at the national level, and a tendency towards simplicity or losing value as scale towards multi-national scale.
- Collaboration must move in concrete ways **beyond transactional relationships** based solely on funding. **Sponsorship** and corporate social responsibility include **exchanging best practices** (and not only resources) with partners, leveraging social impact organisations' ability to pilot and take risks, and exploring opportunities for wider employee engagement (see above).

Human Resources Directors: 'HR work is power shift work!'10 HR Directors from ICSOs met across two peer sessions, focusing on changing organisational cultures to be more inclusive and power-shift ready, and strategies for talent acquisition and staff retention. The themes were discussed in an interconnected way across both sessions, highlighting how much organisational change sits with these 'People people', whose focus is, as one peer put it, being "there to ensure that people are happy working with us."

Shaping organisational cultures to be more inclusive and power-shift ready

The group first looked at informal sources of power as an overall framing of how power shift can happen or be consciously steered in organisations, with insights from a recent International Civil Society Centre benchmarking study on governance power shift practices in ICSOs. Starting from Taaka Awori's definition of power as "the ability and capacity to make and execute relevant decisions", the study shared the following categorisation of informal power being used within organisations: expert or technical, relational, tenure, status and influence, funding and financial, and coercive power. People interviewed also mentioned the influence of personal, symbolic/heritage, convening, founding, gender and regional power as well as people power, power to infuse organisational culture and national cultural origins, and workaholism power. This

was a useful introduction for the group to continue to reflect on what power means for leadership and the current challenges for many organisations.

The HR Directors heard two different peer experiences of shaping organisational cultures to be more inclusive, from Plan International and SOS Children's Villages International.

Plan International's journey on organisational culture for anti-racism and localisation
Lawrence Ncube, Executive Director, Human Resources, shared Plan International's journey so far on embedding anti-racism and equity, diversity and inclusion (AR and EDI) across the organisation, based on its feminist leadership principles and recently launched [anti-racism and equity vision and principles](#). With a strong conviction that the change Plan wants to see in the world has to be reflected internally, its 'anti-racism and equity, diversity and inclusion roadmap' focuses on internal systems, policies and processes, on how Plan works and what it does.

The organisation clearly commits to values-based leadership, expecting all employees to embody underlying behaviours that support the organisation's values and are rooted in feminist leadership and anti-racism principles:
• working well together,
• being inclusive and empowering,
• being open and accountable, and
• making a lasting impact.
Plan also adds two values focused on the individual: myself as a leader, and skills and knowledge.

The roadmap covers eight crucial areas, including:
• Visible leadership, commitment and role modelling
• Driving staff awareness and change
• Embedding AR & EDI into people and culture operations
• Improving internal and external communication
• Strengthening locally-led, equitable partnerships
• Gender-transformative programming
• Using the updated strategy to reinforce the commitment
• Monitoring and measuring implementation effectiveness.

SOS Children's Villages International's new values-based competency framework
Lilly Winder, Deputy International Director HR & Organisational Development, presented SOS Children's Villages International's new values-based competency framework, with safeguarding as the main entry point. SOS expects employees at all levels to reflect its values in their day-to-day work, and at the same time clearly puts safeguarding at the centre of its organisational culture. With input from various levels and geographies across the organisation, SOS has developed a framework to back up its values - commitment, trust, courage and accountability -with a set of competencies it expects all employees to have and show:
• kindness,
• continuous learning,
• inclusiveness,
• initiative, and
• results orientation.

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Through discussions, kindness emerged as the most important competency for its work and actions. However, it can be a challenge to include the framework within local traditions and ensure necessary cultural sensitiveness. For instance, although there seems to be universal capacity for kindness as a key competency, people may have very different understandings of what this looks like. So SOS has discussed this according to local regions and found ways of describing it well in each case, for example "don't be rude and interrupt".

Leaders are expected to show an additional set of competencies, including
- Role model,
- Collaboration,
- Empowerment
- Strategy orientation.

In the next phase, this values-based competency framework will be mainstreamed into key HR processes, such as safe recruitment, performance management, learning and development including leadership and talent, and policies, such as "People and Culture" and the code of conduct. SOS will be developing guidance for different contexts, and using exercises like role play. They plan to use formats that are accessible and can be used even in remote areas. Stewardship of the framework clearly lies with leaders and HR staff

Summary of discussions

Leadership now is about being transformative, not transactional anymore. Leaders need to be mindful of where power and privilege lie and make space for transformation. Change needs to ensure and encourage participation from all levels: internal voices, the 'unusual suspects', giving a space to people who might not normally speak out or to others that challenge the leadership.

Both organisations are trying to fundamentally change people's habits and attitudes. All changes start with self-reflection about each staff member's values, which are very resilient aspects of people's lives and can make or break the relationship with their employer. Commitment to values are normally required by all staff in non-profit organisations. Putting this into role profiles and assessing people through competency-based interviews, as SOS will be doing, is taking this commitment to the next level.

If organisations are serious about a more inclusive cultural journey, want to represent real change and not only be performative, they need to be clear, honest and transparent about it. But does clear positioning help or hinder in acquiring talent? And working with staff along the way, what do employees need to learn, reflect and understand in order to be able to move further in their area of work? How can organisations empower staff to play their part in the transformation? And concretely, how can all of this be included in, for example, performance appraisals and other processes, that invariably also will have to change? These questions linked to the following discussion on acquiring talent and retaining staff.

Effective strategies for talent acquisition and staff retention

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Three HR peers shared their current struggles to retain staff and find new talent. The group agreed there seems to be competition for talent and the sector cannot afford to lose good people. Linking to Day 1, talent retention was defined as "making people happy where they are", offering purposeful jobs and an enriching environment that speaks to employees' values.

Staff retention

For some organisations, staff turnover is currently at an unparalleled high and unacceptably disruptive, while others saw some turnover as a necessary part of day-to-day activity and "usual suspect" support roles (like ICT and some fundraising positions) being difficult to fill. Institutional responses are needed for retention efforts: managers need to stay in touch with team members to "feel the atmosphere" and constructively discuss issues as they arise.

COVID and home office regulations have also increased competition, as people can be more job-mobile whilst physically staying where they are. If used well by employers, this seems to be a useful incentive and, importantly, also enables organisations to better achieve desired diversity and equal opportunities for staff. On a practical level, however, how to provide people with a "digital nomad visa" and solve salary, tax and insurance issues needs to be looked at more closely.

Where turnover is high, exit interviews hint at reasons such as: lack of career prospects, less compensation compared to the for-profit market, ongoing/much organisational change, mismanagement including people feeling 'lost' in their roles, and changes in family settings and personal lives. The issue of career prospects is relevant where organisations are small and/or hierarchies are flat. Innovative solutions are needed for staff who have been around for a while and are asking for development – be it job enrichment, sideways movement, learning and development frameworks, or encouragement to try different things. This drew diverse views in the group on the effort - including financial - needed to help people move sideways, communication to staff that they also need to develop adaptive growth mindsets or may need to leave if they cannot adapt. Employers may also encourage people to move away and come back in a new role.

Talent acquisition

Talent acquisition is also a rising challenge – there seems to be a general shift in people's mindsets, looking for purpose in their jobs more than before, moving between roles and organisations looking for good and fair compensation. While some recruiters look at this positively, others remain sceptical about not so-clear-cut CVs and regular job changes.

The peers also discussed how to achieve racial justice and diversity in practice: How do we attract people from the Global South and what can we offer? How do we get the balance right and offer equal opportunities to all? One example is VSO, which changed its compensation structure seven years ago to only pay local salaries, although it has been a challenging process. World YWCA indicated the challenges associated with being a feminist organisation compensating people fairly whilst also being headquartered in an international hub like Geneva as it can be an advantage but also means managing expectations and assumptions as well as competing for talent with UN or other larger

international organizations - they have to present a clear USP for jobseekers. The effects of external/expat pay on local labour markets also has to be part of the power shift work undertaken by organisations to contribute to fair local conditions.

Finally, the group discussed the kind of people the sector wants to attract and the set of competencies and talent it is looking for (linking back to SOS' values-based competency framework). Organisations should not make it too 'easy' for people to get employed: the journey has to be attractive – including the values, purpose, talent and competencies being sought – but also challenging. Attracting young people was explored. A participant noted that young people want a joyful world, are happy spending free time with colleagues and very attracted by gamification. They would enjoy a team breakfast, and playing Xbox during breaks. Young people have high expectations for development, feeling important and getting regular and positive feedback on anything they do, having grown up with digital media platforms. The old "9 to 5" workday with payment linked to number of hours worked may no longer be appropriate for millennials, compared to a shift towards paying for outputs.

Summary reflections

Over the past decades, HR has moved from a service and support role (dealing with salary, contracts and legal issues) into the centre of many organisations, a shift some organisations appreciate while others still struggle with it. Part of the shifting culture is also reflected in the way we talk about HR, including suggestions to replace the economic "resources" with more humanising "relations".

Participants were futures-looking, reflecting on the role of HR beyond the next couple of years. HR needs to stay connected to the organisation's mission and purpose, and actively accompany, support and even facilitate developments such as power shift, DEI and anti-racism, etc. Ways of working and processes will change again, requiring HR to further deliver messages, shape culture and values, drive change and transformation in the fundamentals of what constitutes an organisation.

Policy & Advocacy Directors

An overall group of 10 Policy and Advocacy Directors met in varying constellations for the two peer sessions. Emphasis was on getting to know each other better, with a number of new colleagues and several organisations with growing advocacy ambitions. Despite some fluctuation of attendance due to competing agendas, the group wants to meet more often, e.g. digital exchange in the second half of the year, but the form of further meetings is not yet clear given changed realities of travel. The two peer sessions focused on current policy/advocacy priorities, and Ukraine and global implications for civil society political work.

Current policy and advocacy priorities

Advocacy focus areas over the past years have somewhat changed, partly due to the pandemic (e.g. intensification of health or vaccine access), and partly reflecting new approaches to

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partnering, power shift, and localisation. Colleagues expressed desire to learn more from each other around bringing local partners and communities into global and regional advocacy dialogues. The continued shrinking of civic and operational space for (I)CSOs plays a role for everyone. Strategies to address this vary, for example working through consortia, or keeping a lower profile ('engineers with opinions'). This can risk being perceived as too much 'self-centring', so it is important to actively include partners and communities in discussions and mitigation strategies.

Ukraine and global implications for civil society political work

The group explored the implications of the Russian war on Ukraine for civil society work. Hugh Williamson, Director for Europe at Human Rights Watch outlined main issues to watch:
Priority on Ukraine (human rights offences, war crimes, etc.)
Civil society in Russia
Reaction in the Global South ('your war, not our war')
Double standards around treatment of refugees, or other conflicts
Hunger and supply chains being a global problem
International justice

Dr. Maksym Yakovlyev, Chair of International Relations and Director of the School for Policy Analysis at the National University of Kyiv-Mohyla Academy, and Anastasia Slyvinsky, a journalist from Kiev, also added several aspects. In particular, they highlighted the increased humanitarian and political needs of Ukrainians since 2014, the way this crisis is being communicated, the relationship with Russia (and Russians), the long-term economic fall-outs for Ukraine, the expected 'booming' of CSOs in the aftermath of the crisis, and the need for longer-term support to civil society. Anastasia's media perspective included the importance of individual testimonies, the dangers of propaganda war, deep fakes, and 'radical bluffing' – all contributing to very different pictures of what is going on in different countries and societies.

The discussion over the role of ICSOs was wide-ranging, from humanitarian and human rights interventions to the need to prepare for longer-term involvement. The crisis is taking significant capacities and space for advocacy on other issues, which needs to be balanced carefully. Overall, the exchange was recommended to continue as the situation develops.

Programmes Directors

10 programmatic leaders from ICSOs met for two peer sessions focusing on development co-operation and finance trends and implications for ICSO programming, and organisational sharing on progressing locally-led development.

Development trends and possibilities for ICSO programming in the 2020s

In this thought-provoking session, the Programme Directors explored insights from Hassan Damluji, author of 'The Responsible Globalist: What Citizens of the World Can Learn from Nationalism' and Jonathan Glennie, author of 'The Future of Aid'. They are founding partners of the new initiative Global Nation, working towards a more collaborative world.

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Hassan made a compelling, data-driven case debunking narratives around the fragmentation of public identity as global citizens - in the face of pressures from nationalist and populist sentiments:

- Worldwide, public sentiment towards international co-operation has stayed the same since 2016.
- 50% of people say that they are "more citizens of the world than of their own country" (Glocalities global polling across 18 countries representing more two thirds of the world's population)
- >50% of people in every country say they want international organisations to have enforcement power over issues like the environment and climate change (International Social Survey)
- Two-thirds or more of the public in the most populous and fastest-growing countries like India, Nigeria and the Philippines say they are citizens of the world, compared to lower proportions in high-income countries, where talking about global identity has become 'unfashionable' given the political challenges of recent years
- India is the size of the entire world's population in 1880: it is a planet-sized nation, with a planet-sized complexity of languages, religions and social class. Although it does not have as strong a national feeling as some smaller, more homogeneous countries, two thirds of Indians say they are "very close" to their country, and 11% of GDP is collected in federal tax for national projects. We can learn the lessons of what has gone well and what has gone badly in building massive nations like India, as we try to build stronger global identity.

Having a global identity as humans is not a "nice to have", it is an absolute prerequisite of making the kinds of trade-offs and difficult decisions needed to cooperate as a world to solve our greatest challenges, like climate change or pandemics. Having a group identity is the one mechanism that humans have developed to allow us to overcome the incentive for selfishness and solve common action problems.

There is widespread support around the world for coming together in a meaningful way at an international level and recognition of a global identity for common action to solve problems and create public goods. This does, can and should co-exist alongside regional collaboration and recognising stronger localisation. As individuals, we are able to tell stories of complexity and multiple co-existing identities in ourselves, so why as organisations are we still trying to enforce a sense of uniformity, rather than learning the lessons of what has failed?

Jonathan shared arguments for three key areas where ICSOs still need to 'move beyond':

- Beyond extreme poverty to inequality: the international definitions of poverty levels – "middle income" and "poverty lines" are arbitrary, without any serious evidence behind them, yet are used for fundamental decisions like withdrawing from countries and regions – like Latin America – where solidarity is still needed on major social and economic issues
- Beyond 'us and them' charity mindsets to dignity, solidarity to 'circular cooperation' where exchange of ideas and collaboration are valued as currency, as much as financial flows
- Beyond growth mindsets which have prioritised quantity over quality and meant that long-term systemic issues are trumped by the short-term programme 'results' and campaign 'win' focus of most ICSOs. Organisations are missing opportunities to deliver better on what they

do and improve processes as they consolidate, but these pressures are also causing stress in the workforce.

The Programme Directors discussed the renewed role of international CSOs in remobilising solidarity with cross-border communities experiencing the same issues and through this common, shared identity. There is also still a lot of work which ICSOs need to do to educate both their own boards and donors to change narratives and mindsets.

Progressing locally-led development
Part I: Establishing organisational approaches

The Programmes Directors heard two contrasting experiences and learning journeys on progressing locally-led development, from HelpAge International and ADRA International.

HelpAge International's journey of learning on locally-led development
Cherian Mathews, Deputy CEO, shared how locally-led development means reclaiming HelpAge's original vision of supporting national actors and delivering a global voice. Key principles guiding the approach are: autonomy, do no harm, adaptivity, collaboration and transparency. An advisory group of both HelpAge staff and partners is exploring partnership principles, systems and policies to elevate good practice and suggest and test new ideas for partner-led programming (PLP), including minimum standards for PLP, feedback mechanisms, costing and cost sharing, capacity building/co-creation and partnership assessments. HelpAge is also undertaking a country transition process in 13 countries to move to a locally-led model, with local network actors driving the assessment and options. Key enablers include active engagement of network members and partners, adaptive timelines to manage the process and bringing external inputs and exchange of ideas. Some challenges include: the tension between this organisational commitment and staff concerns around their jobs, and a complex process which can make it difficult for teams to take ownership of it. The wider ecosystem of growing donor compliance is also a challenge, but the external trend towards localisation is also helping to maintain momentum. This is still very much a learning journey for HelpAge.

ADRA International and localisation
Imad Madanat, VP Programs, shared how localisation in an organisation like ADRA International looks very different. The humanitarian Grand Bargain has been a big driver, as well as the real development benefits the organisation has seen, such as local actors leading when access was limited during the pandemic. ADRA is uniquely positioned as a faith-based organisation to leverage its connection to the larger Seventh Day Adventist Church and communities as local actors. Its model is already more localised than most ICSOs - many country offices have local boards and leadership and most have local control. The pace, form and shape of localisation is still being defined and may depend on donor definitions. But country leaders will need to start operating with more entrepreneurial mindsets as their model shifts from an international donor to a local implementer. Regional capacity will be needed to support country offices with technical knowledge, strategy, resourcing and external collaboration until they can stand on their own as local actors. ADRA will continue to invest in supporting localisation but it may not be possible in

all situations - localisation may be limited in crisis and conflict situations, and if legal issues or registration challenges are presented by host governments.

Part II: innovating measurement and MEL practices

Two organisations, CARE International and World YWCA, shared examples of how they are innovating their monitoring, evaluation, learning and accountability processes to better reflect locally-led development, power shift and feminist principles.

CARE International's work in progress on measuring partnership
Allison Burden, Programme Director at CARE International shared their 'work in progress' on how to measure change in relation to their global commitments on partnership, both in terms of indicators and process. For the area of work around partnership standards and accountability, they are defining commitments and indicators around: (i) co-ownership, (ii) shared risk management, (iii) collaborative compliance, (iv) adequate investment and (v) intentional learning and accountability. Some metrics are proving harder to define and track, like risk mitigation. They have also drafted global partnership targets around reach and impact, diversification of partners, funding and partner perceptions. The team is keen to engage with peers to help learn from them on how realistic these targets are and how to balance self-reporting and partner feedback. One particular challenge that CARE faces is how to achieve the targets in the context of a high proportion of restricted funding which may make it more challenging than for ICSOs with more balanced unrestricted and restricted funding.

Gender-transformative MEL and locally-led accountability in World YWCA's YW4A programme
Thabani Sibanda, who leads World YWCA's [Young Women for Awareness, Agency, Advocacy & Accountability (YW4A)](#) initiative', introduced its gender-transformative monitoring, evaluation and learning (MEL) and accountability practice through Young Women's Reference Groups. YW4A is a 5-year programme (2021-2025) in Palestine, Egypt, Kenya, and South Sudan, with the goal of defending and expanding the fulfilment of young women's rights to dignity, bodily integrity and equal participation in decision-making, through the implementation of gender-just policies and laws. It is supporting the agency and capacity building of 17,540 young women and 27 women's rights and faith-based organisations in the four countries.

Gender-transformative MEL uses feminist principles for co-creating knowledge and ensuring that the MEL process itself is used to build solidarity. It shifts power from implementing organisations to young women in programmatic assessment and co-decision-making. Young women take an active role throughout the MEL cycle – steering the design of the process, identifying and collecting data through their choice of tools, driving analysis and contextualising and validating MEL findings (whether they reflect lived experiences), and generating action.

The Young Women's Reference Groups in each of the four countries are diverse, inclusive groups of carefully selected women aged 15-30 who can reach out to and represent others in their communities. They interface with the country leads, women's rights and faith-based organisations and a larger group of young women. The groups have a crucial role in validating evidence gathered during MEL processes and represent diverse young women's voices at key moments of the programme cycle. Workshops with the groups have generated contextualised indicators

and the programme outcomes they would like to see, and influenced the design of baseline studies and definition of capacity building outcomes and tools for both women rights' organisations, faith-based organisations and the young women themselves.

World YWCA is also keen to engage with others to discuss some of the key programmatic challenges like sustaining the cohorts of young women with high mobility/attrition rates, planning for trauma-informed care and referrals in their work, and challenging norms and practices which continue to work against the leadership of young women.

Summary reflections

There is still a lot to learn in terms of the practicalities of how to measure progress as organisations deliver commitments on locally-led development and the programmatic impacts of implementing these changes. Building both institutional memory and peer support and sharing of good practice will be very important. Learning lessons from local partners in contexts where ICSOs have already transitioned relationships – like South America – are also potential opportunities.

In summary, there was significant appreciation of the deep 'power shift' progress being made in programmatic work in our sector, and interest from the Programmes Directors in seeing whether their HR and Policy/Advocacy peers were similarly making such deep strategy and development decisions informed by 'locally-led' or 'context-led' development. (NB. The HR summary above shows this is the case for that group!). There was interest in convening again with these peers on this, and we flagged all three groups as critical audiences for the Centre to continue engaging through its inclusive power shift work.

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