

Developing a New Strategy for ActionAid to Advance a Human Rights-Based Approach to Development

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Abstract

The international non-governmental organization (NGO) ActionAid has been working with a human rights-based approach to development since 1998. Over the past year it has been reviewing its work and has developed a new agency-wide strategy for 2012–2017 which consolidates and advances the human rights-based approach. In this article David Archer, who facilitated the development of the new strategy, explains some of the key issues addressed, documents the participatory processes used to build ownership and highlights lessons learned that are relevant for other practitioners and organizations.

Keywords: international development; non-governmental organization; organizational change; organizational culture; participatory methodologies; strategy

Background

ActionAid started life in the United Kingdom (UK) in 1972 as a charity sponsoring children in India and Kenya. It has evolved dramatically, moving to a human rights-based approach in the late 1990s, shifting its head office to Johannesburg in 2003 and moving governance power to the South using a federal structure and international assembly. A key turning point was the development of ‘Fighting Poverty Together’ (ActionAid, 1998), the organization’s ambitious strategy for 1998–2004. The follow up to this, ‘Rights to End Poverty’ (ActionAid, 2004), setting a strategy for 2005–2010, continued this process of transformation. ActionAid committed to learning from this past experience through 2010 in order to produce a new international strategy in 2011 for the period 2012–2017. Whereas previous strategies have been developed in relatively more closed processes, with a handful of people mandated to draft a document and collate feedback, for this new strategy ActionAid was committed to a much more ambitious process, involving as many of the 2,700 staff as possible, fully involving the new governance structures and reaching out to partner organizations, supporters, and the communities where ActionAid works. The strategy was particularly important as a

new Chief Executive, Joanna Kerr, started in July 2010 – the first external recruitment to this post for 18 years.

A key part in the process was an international conference held in January 2011 in Johannesburg, convening 120 people from 45 countries to help to shape the future strategy for the organization. This was the first time that many of the participants had met each other, as one third came from the new governance structures of ActionAid (the International Board and Assembly) who had little previous interaction with most of the management or staff (who were represented by all International Directors, Country Directors and the international heads of themes and functions). There were many potential tensions and some widely divergent views about the future role of ActionAid, about its identity, political economy, structure, governance and political positioning.

The five-day conference changed location every day – with participants only finding out the venue for the day when they got on a bus in the morning. The methodologies used were very distinctive – from an intense ‘market day’ when open air platforms were given to people for three or four minutes to make their case, to the use of four creatively presented ‘scenarios’ of ActionAid in 2020. The outcome was a remarkably high level of convergence around the future direction, captured on the last day in a ‘composite scenario’ which had been written overnight based on feedback over the first four days. This provided the foundation for the writing of a first draft of the strategy – which was circulated widely internally and externally for comments – as were three subsequent drafts, before the International Board signed off on the new strategy in May and the ActionAid Assembly (the supreme decision-making body, consisting of representatives from all national Boards) approved the strategy in July 2011 in Tanzania. The process of building the new strategy was considered as important as the product – as implementing the strategy will depend on wide ownership and understanding across the federal organization.

Convening the Team

An internal recruitment process was conducted in April 2010 to identify a Project Manager to lead the review and strategy development process. I was appointed to this position, seconded for one year from my position as Head of Education, with support provided by a project officer, Catherine Rodgers. These were the only dedicated posts, but a wider Staff Reference Group was also convened, which would later evolve into a strategy drafting team – a few people who would dedicate a percentage of their time to supporting this process. The intention was to have a group of senior people across the organization, but not to include any International Directors in order to ensure some independence and willingness to critique the past. Chaired by the Project Manager, this team included: Aida Kiangi – Country Director (CD) Tanzania; Belinda Calaguas – Head of Policy and Campaigns UK; Everjoice

Win – Head of Women’s Rights; Frans Mikael Jensen – Director, Denmark; Hussaini Abdu – CD Nigeria; Jorge Romano – Head of Governance; Katinka Lindholm – Head of Fundraising and Communications Sweden; Rudi Lewin – Head of Finance in Europe; and Sandeep Chachra – CD India. This team guided the external review, organized the strategy conference and wrote the draft strategy. At the same time Joanna Kerr, the new Chief Executive, put in place a Governance Reference Group, to ensure that Assembly and Board members were fully engaged in the process of developing the new strategy.

Looking Back: The Taking Stock Review

The first step was to look backwards – to review what progress ActionAid had made against its previous strategy, Rights to End Poverty. This needed to be an independent review done by external consultants. The outgoing Chief Executive, Ramesh Singh, had approached some people, notably the team leader L. David Brown from Harvard. From June to October 2010 a team of seven independent consultants, each specialized in different areas, visited six countries where ActionAid works, reviewed almost infinite numbers of documents and interviewed countless people internally and externally. The team was made up of Ayesha Imam (reviewing Africa and women’s rights), Jagadananda (Asia and grassroots programmes / social movements); Gina Vargas (Latin America and social movements); Matthew Sherrington (fundraising and communications); Siham Bortcosh (finance); Alan Fowler and Wendy Crane (human resources/organizational development and governance). Additionally there was a review of external data relevant to ActionAid’s work (by Swati Narayan); a review of internal data, tracking changes in staff, partners and programmes in recent years (by Shoab Siddiqui); a self-review by every country, theme and function; a campaign and policy review by Kate Gilmore; a staff climate survey (completed by 70 per cent of staff) conducted by Hewitt Associates; and an external stakeholder survey completed by 400 people, led by the Management Assistance Group in Harvard. This all came on top of many country reviews and thematic reviews conducted over the previous year.

Out of these processes, each consultant wrote an individual report and these were shared in a one-week workshop in October 2010, where the team consolidated their analysis, enabling L. David Brown to then write a synthesis report. All reports were circulated across ActionAid with feedback shared before a final version of the Taking Stock Review was presented to the international Board in December 2010. This systematic, inclusive process of review was an essential part of the process for preparing the conference – and hearing from these external consultants was the fundamental base that we used on the morning of the first day of the conference.

Looking Forward: Propositions for the Future

One of the main ways for staff across ActionAid to get involved in shaping the future strategy was through forming self-organized groups to put forward one-page propositions. These propositions could be about mission-related priorities for the future or about how ActionAid should be organized. From July 2010 onwards anyone could initiate a group or join a group, facilitated through ActionAid's intranet site, the Hive – as well as encouraged through monthly emails sent to all staff around the world urging their involvement. By November 2010 over 80 self-organized groups had formed and prepared a one-page proposition, and the Staff Reference Group reviewed all of these, giving feedback, for example where it was felt that propositions were not clear, or where links could be made across groups.

Mission-related groups were formed on diverse issues such as: urban poverty; children and youth as agents of change; climate justice; social protection; tax justice; knowledge for transformation; food, hunger and livelihoods; education for active citizenship; conflict; corporate campaigning; land, natural resources and livelihoods; persons with disabilities; and dalit and indigenous people's rights and dignity. Meanwhile, organization-related groups came together on issues such as reforming the monitoring and evaluation system; re-conceiving child sponsorship; multilingualism in ActionAid; work-life balance; matrix management; growth or consolidation; integrating participatory methodologies; re-imagining accountability; capacity development; trade unionism in ActionAid; ActionAid's digital future; and the federal model.

Recognizing that not everyone relished forming groups and that some great ideas might be generated from any corner of the organization, the process was also opened up to individuals who could make 300-word propositions for the future. These did not have to be discussed with anyone else and could even be submitted anonymously, for example if people thought that their idea might not be appreciated by their immediate managers or colleagues. By December, 50 individual propositions were submitted – only two of which were sent anonymously. They came from every region and from a wide range of staff.

All of these propositions gave a remarkable flavour of the spectrum of hot issues across the organization – and served as an essential foundation for the conference, informing the development of the 2020 scenarios and being the backbone of the second day of the conference, the market day.

Involving Partners and Communities: Future Strategy Days

Involving staff in the review and strategy development process was an important start but there was a strong feeling that partner organizations and people struggling with poverty and injustice in the communities where ActionAid works should also be involved. In order to facilitate this two

Future Strategy Days were organized – one on 20 October 2010 with communities and one on 14 December with partner organizations. On these days every ActionAid office in every country was encouraged to organize special events to seek inputs to the new strategy. A PowerPoint presentation and video were prepared in order to introduce people (who would only know ActionAid from their local or national work) to a wider view of ActionAid's work across 40 countries. Participatory sessions enabled people to give feedback on the priorities in the present strategy and to comment on what they saw as essential to continue or necessary to change. Visualization tools helped people prioritize their feedback – and each country was asked to produce a single two-page summary of the key insights across locations. At least 12 countries engaged in very systematic processes, others were more tokenistic, but there was some involvement in every country, reaching out to communities and partner organizations. Insights from these processes informed the framing of discussions on the first two days of the conference.

Navigating Future World Views

This very intense internal process generated plenty of debate but the focus was inevitably on the immediate challenges and opportunities faced by ActionAid, without much reflection on the way that the wider world might change in the coming years and how this might affect ActionAid. There is a whole industry of 'Future Studies' but navigating this material and making sense of it for ActionAid's context was a challenge. To fill this gap Alex Evans from the Center on International Cooperation (CIC) at New York University was commissioned to help. He leads their work on climate change, resource scarcity and multilateralism and is joint editor of GlobalDashboard.org, a blog on global risks and foreign policy. He was previously Special Adviser to the Hilary Benn MP, then UK Secretary of State for International Development, and before that at the Institute for Public Policy Research (IPPR) in London. His paper drew on very extensive sources and outlined eight critical uncertainties facing the world in the coming decade:

- What is the global balance of power in 2020 (how far will the United States decline and when will a multipolar world emerge)?
- Will job creation keep pace with demographic change to 2020?
- Is there serious global monetary reform by 2020 (will the dollar be replaced)?
- Who will benefit from the projected 'avalanche of technology' by 2020?
- Will the world face up to the equity questions that come with a world of limits by 2020?
- Is global trade in decline by 2020?
- How has the nature of political influence changed by 2020?
- What will the major global shocks be between now and 2020?

From these uncertainties, Alex drew out 10 key recommendations for ActionAid. The organization should ‘be ready’ (because shocks will be key drivers of change); it should talk about resilience (because the poor are in the firing line); it should put its members in charge (because they can bypass the organization); it should talk about fair shares (because limits change everything); it should specialize in coalitions (and not just of civil society organizations); it needs to take on the emerging economies (including from within); bring news from elsewhere (because innovation will come from the edges); expect failure (and look for the silver lining); work for poor people, not poor countries (as most of the former are outside the latter); and be a storyteller (because stories create worldviews).

All of these insights were important for the conference in Johannesburg in January 2011 because to catalyse change you need to shake people out of their present comfort zones, assumptions, and ways of working. Participants needed to be open to a bigger future. Presenting this work would be crucial on the afternoon of the first day.

Choosing Conference Venues

So many organizations spend so much time flying people around the world to conferences in hotels – where the participants have little or no engagement with the country or context in which they are staying. This mould needed to be broken – to set an example, create a new dynamic, and help transform the organizational culture of ActionAid. One initial thought was to have a ‘walking conference’, where participants would go on a long march, staying in different locations. Another early idea was to hold the conference on Robben Island where Nelson Mandela had been imprisoned. These two ideas were amongst 15 outlined in an initial concept note for venues, produced in September 2010 and sent to Lauren Fok, the assistant to the new Chief Executive. She proceeded to make links with possible venues and set up a schedule of visits for the Project Manager in October. By November the sequence of venues was agreed and the contracts were finalized in December. It was decided that the first day should be conventional – with some participants likely to turn up late, the first day should be in the same hotel where people were staying. After that, a different venue would be used each day, with no one knowing where they would be taken until they got on the bus each morning. This ‘mystery tour’ element generated a lot of excitement – and desperate (unsuccessful) attempts to break open the secrets.

Identifying Knotty Issues

In any organization there are many areas of consensus and some issues on which there are tensions. The 10 people in the Staff Reference Group, coming from very different constituencies and backgrounds, were a microcosm of the wider organization – finding easy convergences on some issues

and serious divergences on others. Meeting in Johannesburg in October and London in November, the team was able to draw on all the materials generated by the processes outlined above – and started to map out where the common ground was clear and where knotty issues remained. The table below captures some of the key issues that emerged:

Drafting Scenarios for ActionAid in 2020

In December 2010 a small group (myself, CEO Joanna Kerr, Latin America Director Adriano Campolina, and Tanzania Director Aida Kiangi) met in Johannesburg to develop three scenarios of ActionAid in 2020. Each of these scenarios would have within them some of the key tensions faced by the organization today but re-framed and looked at through different lenses, detaching people from their immediate struggles and personalities to focus on the big picture and the consequences of making particular choices now. The intention of the scenarios was to facilitate ‘triple loop learning’ so that people can explore more than immediate results, actions or programmes, and can start to look at deeper level assumptions and beliefs. The methodology was chosen as a creative way to enable people to look at mission fundamentals. The scenarios were not intended to be real. They were tools to facilitate conversations, their purpose was to start a dialogue. They were not options to choose from or platforms – they were stories, caricatures and exaggerations, designed to facilitate a deeper level strategic conversation.

The small team started by reviewing the knotty issues, those areas where more clarity was needed, prioritizing them and picking out a spectrum of three options for the key ones – which could be filtered into three scenarios. The key ones that were identified included:

- Child sponsorship and children – a) phase out; b) reform in line with rights-based approaches and narrative links; c) make children active agents of change / the focus of programmes.
- Autonomy and centralization – a) excessive autonomy, fragmentation, minimum secretariat; b) excessive centralization, affiliates expelled etc; c) balance – big secretariat and significant autonomy.
- Focus – a) highly focused, one unifying issue; b) spread of four or five issues much as now, but big focus on women as ‘who’; c) proliferation of many issues, our focus is purely ‘how’.
- Poverty – a) focus on poorest of poor; b) focus on movements against poverty; c) address poverty and injustice everywhere.
- Politics – a) very radical; b) unconventional alliances; c) reformist.
- Growth – a) for money; b) for influence; c) to reach poorest.
- Evidence / Evaluation – a) we have strong systems / prioritize; b) we have multiple context specific approaches; c) we confront a crisis of not being able to prove impact.

Table 1

Convergence / clarity	Need more clarity
Women's rights are a central priority	What it means to be a feminist organization/adopt feminist principles?
Human Rights-Based Approach (HRBA) and transforming power	Are we too focused on the state as duty bearer? How to measure change?
Children are a knotty issue	The place and scope of work with children – do we need narrative links, targeted programmes, active engagement of children?
Solidarity is important – we cannot do things alone	How to improve our partnership practice?
Internationalization was and is key, southern power, dual citizenship	How to resolve mutual accountability gaps? What should be centralized? Role of the International Secretariat?
Need to respond to conflict and disasters	What is the optimum scale / balancing of direct response with influence, how to ensure response is in line with HRBA?
We need focus, need to have a few specialisms	Focus on what? Who defines?
Growth is essential	Vertical, horizontal or both? Where we grow? How we grow (influence / money / mission)?
As context changes ActionAid needs to change	Balance of consolidation versus change and new work?
Campaigning is a key part of our theory of change, but current campaigns are weak (too northern, too policy- and communications- focused)	Where and how much to invest, what does a successful campaign mean, lack of an innovative campaigns model that fits our theory of change?
We should be grass-rooted – long-term deep engagement with communities	How much to invest in local programmes? Role of service delivery?
Southern fundraising / especially re-emerging economies, is key	How fast should we grow in southern markets? What is the ambition? How to tackle competition?

Programming in North and South

Supporters / sponsors becoming activists

Need for a bold and clear identity – more action less aid

Environmental justice

Engagement with corporates and governments

We need the ability to adapt, respond to shocks and increase resilience

Education work is a success

Governance is central in HRBA and all themes

Food, hunger and land are key issues and ActionAid has developed legitimacy on these issues

There is a need for an International Secretariat (IS)

South – South

Much of the aid and humanitarian business sucks – we have a role

Social networks, role of technology, potential of social movements

Do programmes in North include direct engagement with people struggling against poverty and injustice? What is the balance for funding allocation? What is the scope?

How to do that?

But what?

What does it really mean? How to implement it? How can we link it with vulnerability?

How? How much? Who?

How? Dangers of flexibility and systems weaknesses, what compromise on sovereignty is necessary to achieve optimum flexibility?

What role / place in future strategy?

Is it a stand-alone theme? Approach?

Should it be expanded to livelihoods? How to connect with climate change?

What is the IS's role in programmes? Role of regions and themes? Location?

What investments? Where?

How to most effectively challenge the sector?

How to best harness? How to be at the forefront? Avaaz plus? Discourse change?

Continued

Table 1. *Continued*

Convergence / clarity	Need more clarity
Youth are key	What is the next level for our ‘activista’ network? Southern led? How to integrate it?
Our analysis of poverty and injustice is sound, but we are useless on building evidence base	How to improve evidence from local work? How to ensure the analysis is widely shared and refreshed?
Values are central	Are there too many? Values should be more powerful and non-negotiable?
Urban poverty is a new priority	How much urban work in the future and with what focus / approach? Labour and employment issues?
Institutional income is important	Should we take money from USAID? How much do we invest? What priority should be given to emerging aid programmes of Brazil, India, China?
Our federal model is a strength	How to ensure mutual accountabilities – what is the right balance of self rules versus shared rule?

The next step was to come up with creative formats for dramatizing these. Many different ideas were brainstormed – especially with the help of some red wine in the evening – and finally three options were chosen. The options above were then mixed and matched, allocating them to different scenarios, deliberately ensuring that unexpected conjunctions were made and stereotypes avoided. The result was the following rough allocation across three dramatized scenarios:

Each of these scenarios was then allocated to one person and over a three-hour period the first draft of each was written. These were shared, feedback given and second drafts developed. Adjustments were made to ensure all key issues were adequately covered – and within a single day we had strong drafts of each scenario – each of which would be a 15-minute dramatized presentation. In the following two weeks we designed and developed a key ‘prop’ for each scenario, which would appear at the end of the drama and would be handed out to all participants.

- a cheque for 100 million Bancors
- a map of the world in 2020 with direct solidarity links
- a ‘wanted’ poster for the Chief Executive

On the back of these props was the full text of the scenario – which would enable participants to read through in more detail and discuss / dissect in small groups. These were the final ingredients for the conference.

Conference Day One – The Hotel

The first day was the relatively conventional day, based in the ballroom of the Sunnyside Park Hotel in Johannesburg where all participants were staying. After powerful opening speeches by the Board Chair and other key Board members, the Chief Executive, Joanna Kerr, outlined the role of the conference and Meenu Vadera, an external facilitator, outlined the process for the week. The morning then focused on the Taking Stock Review – with a video of the eight consultants involved and live Skype video presentation by the lead consultant L. David Brown followed by small group discussions. The afternoon shifted the focus to the future with a Skype video presentation about future trends and then further group work to analyse the key implications for ActionAid. The day went smoothly and participants were largely happy – but the format was nothing out of the ordinary.

Conference Day Two – Constitution Hill

Venue

As people boarded the buses they were given a handout explaining the venue. Below are some excerpts from this.

With our present and future strategy underpinned by the human rights framework, Johannesburg’s Constitution Hill is an apt location to start

Scenario 1: Mumtaz talks to Pedro

Premise: a direct solidarity link, through live web-chat between Pedro, a young Brazilian activist interested in becoming an ActionAid 'actionista' and Mumtaz, a community activist in rural Pakistan.

Identity and positioning in the sector	Whole organization works under one thematic focus. Actionista: Radical, highly critical, risk taking
Theory of change and approach	Highly political: strengthening the struggles and activism! Movement building, mobilization, engaging and building confidence of rights holders, exposing and denouncing violations, using technology to connect people and struggles
Focus and scope of programmes	Focus on redistribution as the only theme, organizing those who are excluded, building grassroots movements and connecting with broader movements, building capacity, campaigns
Results / Evidence	Excellent evidence gathering, using child sponsorship architecture to collect evidence
Federation – centralization / autonomy; IS size and role	Centralized federation, small secretariat
Resourcing model	Transforming child sponsorship – centres of excellence, de-restriction, impact on children well documented; strong Monitoring and Evaluation and effective partnerships
Shocks	War and displacement
Growth	Growth based on influence

Scenario 2: Who wants to be a zillionaire?

Premise: A dramatization of a live Sino Qatari FIFA webcast, organised to pick the organization that will benefit from the 2022 Football World Cup in Qatar, with Dev Patel hosting and Amina from the Feminist Action Forum answering ten questions to secure 100 million Bancors for ActionAid.

Identity and positioning in the sector	Mainstream, keep good relations with government and corporates, highly flexible
Theory of change and approach	HRBA and influencing private sector, campaigns
Focus and scope of programmes	3-4 broad themes, big emergency response capacity, programmes in North and South

Results / Evidence	Evidence of campaigns
Federation – centralization / autonomy; IS size and role	Big secretariat, IS driving relationships, multiple offices, no regional offices
Resourcing model	Phase out child sponsorship, increased and diverse institutional funding, other individual giving and linking products, online etc.
Shocks	Collapse of internet?
Growth	Opportunistic, money-led

Scenario 3: ActionAid on trial - Climate Criminal Court

Premise: A live TV report outside the 'International Climate Criminal Tribunal' as they await the judgment in the case of the Planet Action Group versus the Chief Executive of ActionAid – accused of having a huge carbon footprint and not being able to show real evidence of the impact of its work on the lives of poor people.

Identity and positioning in the sector	Giving as solidarity
Theory of change and approach	Women are drivers of change, children are agents
Focus and scope of programmes	Focus on action, thematic proliferation, silent emergencies, women and children, children dedicated programmes as integral part of HRBA
Results / Evidence	Poor evidence, focus on process
Federation – centralization / autonomy; IS size and role	Loose federation, strong autonomy
Resourcing model	Strong child sponsorship model, with children dedicated programming fully integrated on HRBA
Shocks	Climate change?
Growth	Rapid financial growth

our journey this week. Not only is it the home of South Africa's new Constitutional Court and the protector of the nation's basic rights and freedoms, but it is also the historic site of Johannesburg's notorious Old Fort Prison Complex, commonly known as Number Four. Here, before the dawn of democracy in 1994, thousands were brutally treated and many leading male and female activists were detained, including Mahatma Gandhi, Nelson Mandela, Oliver Tambo, Joe Slovo, Walter Sisulu, Ruth First, Winnie Mandela and Lilian Ngoyi. As a venue, not only does it represent past violations, but is also a beacon for the future protection of our human rights.

Our focus today will be on the exchange of propositions for the future, in a 'marketplace' atmosphere. We hope you can free your thoughts, be open to new ideas and find inspiration in this historic venue. There is a huge range of ideas around who we are, what we should do, how we should do it and even where we should work. We may not agree on everything but this venue should remind us that behind this diversity lies a remarkably strong shared commitment to the human rights based approach in our common struggle to eradicate poverty and injustice.

Process

This was a very dynamic day in which a wide range of the propositions developed by self organized groups in previous months were given a platform for presentation of key ideas. Under a marquee in Joe Slovo courtyard, the propositions were clustered into groups. The first cluster dealt with **WHAT** ActionAid should prioritize in the coming years in relation to existing themes (good governance, women's rights, education, food rights, HIV, and human security) and each person was given just four minutes to present the essence of their ideas. They were given a card to indicate when they had one minute left, handed a flower when they had 30 seconds left and then heard a loud vuvuzela when their time was up. After all six had presented they moved to different corners of the courtyard and the 120 participants could go and ask follow-up questions in three cycles of six minutes each, so that each person could follow up with three of the six speakers. This proved highly energizing and led to some intense but concise debates.

The second cycle of platforms dealt with a further dimension of **WHAT**, new potential priorities which different self-organized groups had proposed: urban poverty, climate justice, redistribution, conflict, fundamentalism, labour and care economy, and natural resources. Each was given a four-minute platform and again was followed by a scattering of the speakers to the corners of the courtyard and three cycles of six minutes each for follow-up discussions.

The next session changed the format – with a presentation and discussion on **WHO** we are – our core identity: to help build a collective understanding of what identity means and what that looks like. This explored our values, the importance of focus and some core ideas about how we might frame our identity as a leading challenger to the sector. The case for a feminist identity, for an activist identity, for a multilingual identity, for accountability as integral to our identity, and for a shared identity to our work in North and South were made. Buzz groups explored a series of questions around: What do we do? What difference do we make? What are our values? And what's different about us?

The final session of the morning looked at **WHO** we work with – ranging from youth to indigenous people and people with disabilities. There was then an intense debate on how we work with children, with six people expressing their views for two minutes each before an open forum chaired by the Chair of the Board in Kenya.

This was followed by an extended lunch break so that after eating, participants could tour the venue, visiting the cell where Mandela was detained, seeing details of the Truth and Reconciliation Commission, and visiting the Constitutional Court and the Women's Jail.

The afternoon followed a similar market place pattern as the morning, with a round of platform spaces given to people making the case for **HOW** we should work in future, starting with propositions on child sponsorship; fundraising in the South; securing institutional and high value income; the role of mass communications; the potential for digital media and information and communication technologies for development; the importance of knowledge management; and the centrality of accountability. Again, four-minute platforms were given to each and these were followed by three rotations for follow-up discussions in small groups.

The second cycle of **HOW** platforms addressed the future of campaigning; the role of integrating participatory methodologies; our work with corporates; the future of internationalization; the structure of the International Secretariat; trade unionism within ActionAid; and preparation for shock.

The final session of the day focused on **WHERE** we work – exploring the different rationales for geographic expansion, from the scale of poverty, the fundraising potential, our influence, our potential for impact, and so on. Small groups were given case studies of how other organizations have expanded and the rationales they use, and a long list of potential criteria that they were asked to prioritize.

The effect of this energizing but exhausting day was to put everything on the table – so that everyone was brought up to speed with the range of issues and scale of ambition across the organization. This was a day for raising the breadth of concerns and interests, not making choices.

Conference Day Three – The Origins Centre

Venue

The Centre is home to an extensive collection of rock art and fossils from Southern Africa, including the earliest images ever made by humans, which were found in South Africa in recent years. You can watch the oldest-known ritual still practised today – the San/Bushman trance dance. On a more contemporary note you can see the remarkable tapestry telling the story of creation and evolution, embroidered by women from the Kopanang Community Trust, a project that provides sustainable financial income to women suffering the impact of HIV&AIDS. Whilst rooted in our past, today we locate ourselves in the future – in 2020. We use two innovative scenarios to take us into the future, each a creative expression that dramatises possible outcomes from some of the key choices that ActionAid might make in its new strategy. Neither of these scenarios is intended to be real. Rather they are symbols, instruments that can help us critically explore key issues. Set against 80,000 years, another 10 years seems like a tiny period, but the world is changing faster than ever and in this coming decade dramatic and unexpected changes are likely. How can ActionAid best adapt to this evolving world? Where will humanity be in 2020 and what role will ActionAid be playing?

Process

The first scenario presented was that of ‘Mumtaz and Pedro’ – dramatized powerfully in the Tapestry Room of the Origins Centre. Once presented the participants were divided into 10 groups of 12 people, each with two facilitators and each carefully balanced with people from different backgrounds, roles and countries. Participants were given ten minutes to read the prop and make notes and then the groups simply answered two questions: What did you like? And what did you dislike? In each group every person started by listing all that they liked and all they disliked – and then each like and dislike was discussed in turn and it was recorded on a flipchart if there was strong consensus in the group. Two flipcharts were produced by each group – one of likes and one of dislikes. After 90 minutes these flipcharts were collected and all 10 flipcharts of likes were displayed on one side of the room and all dislikes on another side. Participants then looked through the range of likes and dislikes, and were encouraged to identify trends – where was there a clear convergence? Three people were then asked to summarize what they observed before a plenary discussion was opened up to note other convergences or divergences.

The afternoon session followed a similar pattern: a dramatized presentation of ‘Who wants to be a Zillionaire?’, dividing into groups with the

prop, silent reading and then discussion of likes and dislikes, recording on two flipchart sheets and then a gallery walk and a plenary focused on convergences. The familiarity with the format meant groups worked faster the second time around. The groups had the same participants but two different facilitators.

Conference Day Four – The Apartheid Museum

Venue

Within these austere walls, photographs, artefacts, newspaper clippings, sound recordings and film footage combine to document a harrowing journey into a world of repression, torture and injustice. At times you may feel utterly overwhelmed but at other times, you may feel completely inspired by people's resilience and determination to free themselves. This venue is a stark reminder to all of us of the importance of the struggles that we are part of around the world and the difference that these struggles can make. This museum is a celebration of team work – developed through the combined talents of a multi-disciplinary team of architects, social activists, technology experts, civil servants, entrepreneurs, curators, filmmakers, historians, writers, reporters, designers and many more. Together they have created a space where critical elements of South Africa's past can be preserved and learned from – to better inform and shape the future. Across ActionAid we also have an immensely strong multi-disciplinary team with diverse backgrounds and perspectives. Together we can chart a dynamic future informed by our past.

Process

The morning session followed a similar pattern to the previous day: a dramatized presentation of the 'Climate Criminal Tribunal', dividing into groups with the prop (the 'wanted' poster), silent reading and then discussion of likes and dislikes, recording on two flipchart sheets and then a gallery walk and a plenary focusing on convergences. Again the groups had the same participants but two different facilitators to help refresh the dynamic. At the end of the plenary session there was a one-hour panel session looking at the key areas of convergence across all three scenarios and any outstanding issues.

In the afternoon participants toured the museum whilst the drafting team met International Directors to get their feedback on the process so far. The drafting team then retreated to draft the 'composite scenario' which would be the first attempt to be a real scenario of ActionAid in 2017, capturing the convergence over the whole week. This process was helped by the considerable consensus in feedback on the three previous scenarios – but was nevertheless challenging to capture in a concise way. The drafting team worked in

small groups to try to define just four key strategic objectives – and to flesh out different areas of consensus whilst the Project Manager was locked away to write a final scenario, receiving inputs through the evening and night. The first draft, discussed just before midnight, was modelled on a Taking Stock Review report for 2017, but failed to energize. The second draft at 2.00am based on an activist youth talking to a youth assembly in 2017 worked much better – and was tweaked and revised until being finalized at 4.00am.

Conference Day Five – Soccer City

Venue

Today, on the final day of our International Strategy Conference, we wanted a location where we could celebrate our achievements to date and build a strong consensus for the future, leaving Johannesburg with an inspirational and uplifting collective moment. The obvious choice was the Soccer City stadium, the symbolic calabash on the outskirts of Johannesburg. This stadium was the site of the opening ceremony of the 2010 Football World Cup as well as the place where the final between Spain and the Netherlands took place on 11 July 2010, watched by an estimated 750 million people worldwide. Inspired by a calabash, an African cooking pot, the stadium was completely renovated for the world cup, with a mosaic skin in earthen colours that glows at night: a powerful symbol of solidarity and unity. But the stadium also has a history – the location of Chris Hani's funeral and of Nelson Mandela's first speech in Johannesburg on his release from prison. It is not the individual star players that shone in the Football World Cup last July – but those teams that really worked as teams, with a common goal in mind. Today we need to emulate that approach, cutting across our differences, building a collective spirit and energising ourselves for the future. Today we have one goal: 'one strategy for all'.

Process

The composite scenario, developed the previous night, was presented in the format of an opening speech at the 2017 ActionAid Youth Assembly. This drew on the feedback on all the previous scenarios and was the first attempt to present a scenario which we genuinely believed was in line with what most people in the organization supported. The dramatic presentation was followed by 30 buzz groups of four people in each – who discussed two questions: What excites you? and What needs more work? Views from across the room were collated by the Chief Executive – and a remarkably high level of convergence emerged.

At the end of the feedback and discussion session everyone was asked to line up to indicate the extent of their agreement with the core direction for

the future strategy as captured in the composite scenario. Those closest to the football pitch represented 100 per cent agreement and those furthest away were zero per cent. The vast majority of participants were clustered around 70 to 80 per cent. No one indicated less than 50 per cent support – and only a couple of people were at that borderline.

Celebrating this high level of convergence all the participants then descended to the football pitch accompanied by music echoing around the stadium, to hear closing speeches from the Chief Executive, Joanna Kerr and the Chair of the International Board, Irene Odida-Ovonji. This proved to be a highly emotional finale, leaving people energized by the high level of consensus achieved. Each participant completed a written evaluation report before leaving – and these were overwhelmingly positive – giving the drafting team a strong mandate.

The Drafting Team Process

Immediately after the International Strategy Conference, the drafting team retreated to produce a first draft of the strategy. This was produced over four days, fleshing out the four-page composite scenario into a 16-page first draft, adding in the detail from the feedback session and from other moments throughout the conference. This draft, called ‘Catalysing People and People’s Movements’ was circulated at the end of January 2011 and discussed over a one-month period by staff, management and Boards in every country. It was also taken to the World Social Forum for discussion with social movements – and circulated to many partner organizations.

Feedback from this one-month consultation was compiled into a 200-page reference book for the drafting team to review in their next meeting, a week-long retreat held in Bhopal, India in March 2011. This led to a second draft which was again circulated widely for comments – culminating in a third draft, produced in London in April 2011. This third draft was discussed with international Directors and the Board – revised based on their feedback – leading to a final version that was unanimously approved by ActionAid’s International Assembly in Tanzania in July 2011. This final document, called ‘People’s Action to End Poverty’ is 20 pages long and outlines five core mission objectives, ten key change promises and seven organizational commitments. Although the different drafts of the strategy varied in some respects they were all clearly rooted in the consensus that came from the conference in Johannesburg.

The Final Draft of the Strategy

Below is an extract from the summary introduction to the strategy which captures the core of what has been approved:

ActionAid is a global federation working to end poverty and injustice with thousands of communities and millions of people across the planet.

*Building on our learning and achievements over the past 40 years this International Strategy seeks to **deepen ActionAid's impact in a fast-changing world**. In recent years we enriched our practice of a human rights-based approach to development with women's rights as a priority across all our work. We've taken sides with some of the poorest communities around the world, defending their right to food, securing access to basic services and helping to stop corporate abuse. We've built the economic literacy of thousands of excluded people so they can track budgets that affect them and hold governments to account. With social movements, partners and our supporters, we were at the forefront of securing education rights for millions of poor children. We also showed the interconnected, unified approach needed to address both HIV and AIDS and violence against women. Our human rights-based response to the 2005 Tsunami was applauded by an independent review panel. Our HungerFree campaign led to policy changes that benefited women farmers, helping them respond to the world food crisis. And as part of our own transformation we moved our International Secretariat to South Africa and developed a truly unique international and democratic federation – shifting more power to low-income countries and deepening our relevance.*

*Our previous strategy, Rights to End Poverty set a strong direction and helped us progress towards achieving our mission. However change is still needed. This Strategy therefore represents a **balancing of consolidation with innovation** as we pursue alternatives for a poverty-free planet. In this strategy we make it clear how we believe change happens and what our role and approach will be in bringing about this change. We commit ourselves to five core mission objectives and **ten 'key change promises'** against which we will hold ourselves to account:*

1. *securing women's land rights*
2. *promoting sustainable agriculture*
3. *holding governments to account on public services*
4. *achieving redistributive resourcing of development*
5. *transforming education for girls and boys*
6. *harnessing youth leadership to end poverty and injustice*
7. *building people's resilience to conflict and disaster*
8. *responding to disasters through rights*
9. *increasing women's and girls' control over their bodies*
10. *generating women-centred economic alternatives'*

In the coming years we will also transform our leadership, improve our systems, diversify our income and harness the remarkable people-power of

our staff, our committed Boards and Assemblies, our volunteers and supporters, so that together we can:

- *Move on from just fighting **against** poverty to working **for** long lasting solutions to poverty, advancing **alternatives** together with our partners and allies.*
- *Build **deeper connections**: linking people and movements across the planet and across issues; connecting our work locally, nationally and globally; and linking our programme, policy, campaigning and fundraising.*
- *Strengthen our **human rights-based approaches** with a greater focus on changing attitudes and behaviours, using mass communications and campaigning from the local to the global level.*
- *Show the **impact of our work more explicitly** on the lives of women, men, youth and children living in poverty, holding ourselves collectively accountable to delivering on our key change promises.¹*

Rolling Out the Strategy

Although the strategy process built extensive ownership, a 20-page document has many limitations! The challenge now is to produce popular versions of this in multiple languages to share extensively – including a two-page summary, a four-minute music video, a ten-minute animated video, and various supplementary resources. A roll-out programme will involve taking the strategy back to communities and partners who were consulted in the early stages – to let them know what we did with their feedback.

Popularizing the strategy is only part of the challenge. There is also a need to ensure that it is operationalized in a coherent way – by ensuring that country strategies align to the new agency-wide strategy and that a single operational plan is developed by a restructured International Secretariat – to ensure it can fulfil its role in line with the strategy. It also includes revisiting our Human Rights Based Approach Resource Book (ActionAid, 2010) to make it a key reference point for all programmes, fleshing out the 10 key change promises into programmes of rights-based work at local, national and international levels.

This all sounds like a very ambitious process – as indeed it has been – but such a process is essential in a federal organization that is committed to respecting the rights of its members at the same time as delivering a rights-based approach to development.

Some Key Learning from the Process

In developing a new strategy the process is as important as the product – as implementation of the strategy will depend on ownership. The process needs

¹ The full document, ‘People’s Action to End Poverty’ (ActionAid, 2011), is available from david.archer@actionaid.org and on <http://www.actionaid.org>.

to involve governance structures, management, staff and partners. In many respects this is about using the same principles that we use in a human rights-based approach at a community level – and applying them to our own internal process. For example, this includes creating open democratic spaces, using participatory methodologies, respecting people’s knowledge and experience, extending people’s understanding by bringing in external inputs, promoting ongoing critical analysis of power, and strengthening people’s capacity to communicate.

To deal with really knotty issues first you need to be able to name them and then you need to enable people to look at them critically, from a distance. In this case, constructing fictional future scenarios that followed through the logical consequences of taking different positions helped everyone to see issues in a new light and rise above the immediate tensions and conflicts. Using a scenario-building methodology really makes a difference to the level of analysis.

Everyone wants focus but in a large organization this is often better achieved through looking at coherence and inter-connections than a reduction of the scope of work. One of the biggest challenges is to ensure that there is a coherence in the human rights-based approach that is used in every sphere of an organization’s work, including in fundraising and communications with supporters.

An external perspective is essential to enrich internal discussions around human rights-based approaches. Without the external review and various external inputs, for example around future trends, our analysis would not have been as rich. It is always dangerous to assume that you already understand your own organization or the challenges of the external environment. This is particularly important when using human rights-based approaches as the critical reference points are in the public sphere rather than being determined by a purely internal logic.

It takes time to build understanding of a human rights-based approach at all levels. ActionAid’s practice is inevitably uneven and this will be true of any organization. Even after 12 years of using human rights as the foundation for our approach we need sustained investment in capacity building for staff and partners.

Whilst human rights are a fundamental foundation it is important to look beyond the state as a duty bearer. ActionAid’s practice in the past five years has focused consistently on the state as being responsible for delivering on rights and the focus has been on raising consciousness of rights and organizing people to demand rights from the state. However, we also need to hold other actors to account, including corporates and local or national elites – as challenging their power can be essential to advance rights. We need to look at the practice of power at every level, including within households – and in many contexts we need to challenge and transform attitudes and behaviours if we are to succeed in advancing human rights.

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