



CAPACITY DEVELOPMENT PROGRAMME

LEARNING FORUM: STRATEGIC CHANGE - 24th SEPTEMBER 2020

Introduction

The Capacity Development Programme aims to transform the impact of the global Lasallian network through enhanced collaboration. The focus of the Learning Forum session held on 24th September 2020 was twofold:

- To extend and embed learning about achieving strategic change
- To make practical progress on the emerging strategy for collaboration, focusing on 'actions'

In advance of the session participants were sent a document related to effective strategic change titled 'Caplor Islands'. Participants were also sent the 'Emerging Strategy' document and asked to pay particular attention to pages 9 and 10, which highlight (i) 'Our Emerging Strategy on a Page'; and (ii) 'Our Emerging Strategic Goals and Practical Actions'.

Process

47 people logged into and participated in the zoom session, of which 32 were Lasallian network participants, 4 were acting as translators and the remaining 11 were facilitating or supporting the process.

Br Amilcare welcomed everyone and expressed his observations that the process is now entering a phase for working on practical actions.

Peter Stemp reminded participants of the approach of the capacity development programme going forwards and explained what the main objectives of the session would be and why.

Dan Bishop provided a brief, high level recap and explanation of the 'Second Curve' model of organizational strategic change.

Peter Moore provided an overview of the 'Caplor Islands' model of effective strategic change and highlighted what the conversations had revealed about the eight islands, indicating that relatively high scores were attributed to the conviction and culture islands and relatively low scores were given to strategy and structure.

Ian Williams then outlined the feedback from the last session regarding the emerging strategy overview (SOAP) and introduced the group work that participants would be engaged with today – principally focused on the practical actions from the emerging strategy document.

With respect to the feedback he mentioned four main points:

- The overall average score from all participants was **7.0** regarding the question – to what degree do you feel the emerging strategy is effective?
- There is a need to make the strategy even more distinctive and ambitious to achieve the potential of the Network and a need to be even bolder and make the language even better.
- The three Strategic Goals received positive feedback across the board, and
- There is a need to make progress on the Practical Actions.

The group work involved nine groups, each with a facilitator, discussing one practical action and answering the following three questions:

1. Why does this practical action matter so much?
2. How could the practical action be defined even better?
3. What needs to happen to achieve this practical action?

In the annex to the report, the detailed answers to these questions have been recorded for each 'practical action' group.

Feedback

1. On a scale from 1-10, how useful have you found the session today?

14 participants completed the feedback survey and gave the session an average score of **8.0**.

2. Do you have any further comments or feedback relating to the session?

- a. It feels good to start cooking the soup.
- b. As usual the working groups are always inspiring
- c. I'm excited to work further with my group.
- d. We are moving on well.
- e. The topic could not be exhausted in one session, so the group decided to meet outside official time and this is a very good sign of interest.
- f. Now that we are moving into the actions the limited time in workshop groups is challenging. It might be that to make progress some elements could or should be done within groups between meetings if possible.
- g. I appreciate very much that we have tried to meet and talk with Lasallians who use another language.
- h. In the working group we were only 2 people. Maybe if people cannot connect it would be nice to reshape the groups. Thank you.
- i. We are not starting from scratch. Each NGO already has a journey and an experience. It is good that we train and open ourselves to new ideas, but I believe that training and experience cannot go separately.

3. Are there any additional actions that you believe should be worked on besides the 12 practical actions listed on the last page of the emerging strategy titled "Making Collaboration Common"?

- a. The action related to 'strengthened brand and approach to communications' is too internally focused in its representation. If we are to achieve the goals re-funding then external must be considered.
- b. Create a Lasallian directory (database with relevant information, contact person, position etc.) that each single Sector/ District/ school could update by itself.

4. Are there any of the 12 practical actions listed that you believe are not sufficiently relevant to take forward?

- a. The action: 'Circulate leadership statements on a regular basis to nurture and reinforce collaborative intent' is to me less significant.
- b. Circulate leadership statements on a regular basis that nurture and reinforce collaborative intent. If the other practical actions across the 3 goals are implemented this should not be necessary. Also, if relevant it should be part of the communication action.

5. How can we make these sessions more fully accessible to those who prefer to work in French or Spanish?

- a. I think the dynamics of today was fine. Use translators as you have already done. Thanks for asking – I propose a Caplor Horizons facilitator who is fluent in Spanish or French (Spanish speakers).
- b. It is very good to have different languages, regions and countries represented in each group.
- c. 85% of Spanish and French speakers understand and speak English. The meaning of the themes is linguistic and a cultural matter, to mix opinions at best, everyone should be free to express themselves in the language most congenial to him/her. May you think to organize one session only in Spanish (a Spanish-English translator) and one only in French (a French-English translator), in the rooms if the participants are selected according to their L2 (Second Language) they can manage themselves. The Institute has 3 languages French, Spanish and English.

Annex: Detailed Group Work Outputs

Goal 1 – Specific Practical Action:

‘Create an overarching global initiative’

Members: Merv McCormack, Bob Schaefer, Heather Ruple-Gilson, Br David Garcia, Br Amilcare Boccucia

1. Why does this practical action matter so much?

All group members concurred that this action matters significantly. It will impact the whole Institute which is needed. It responds to the current needs of the Lasallian network. It is tangible and proactive. It provides an opportunity to clearly articulate and clarify what makes us unique – it will give witness to what we are – an open, dynamic, action focused network – ‘a church acting as a field hospital’ – providing for the educational needs of vulnerable children and youths.

2. How could the practical action be defined even better?

It needs to define who it is for? Is it for the needs we see in the world – for the youth we support through education? I think it is for the 12,000 young Lasallians.

3. What needs to happen to achieve this practical action?

We need to open up our network to the people - to the young Lasallians and make a ‘movement’. We are at a crossroads where structural change needs to be encouraged at all levels.

We need to create networks where people work towards specific needs and goals, e.g. Beirut fundraising, Mozambique, Covid-19, that offer a global impact.

The projects that are created and the networks that are formed need to focus on solutions. The needs will be global and there will be a group of needs.

Action is formative. The Institute needs to become a Movement. We need to act to find out the answers. We need to be explicit with our language so that it speaks to people in a formative and proactive manner..

Goal 1 – Specific Practical Action:

‘Plan, promote and engage three network wide campaigns per year’

Members: Kate Mason, Fabrice D, Keane Palatino, Rodrigo Pinacho, Serena Pegorin

1. Why does this practical action matter so much?

It is about the ambition of ‘giving voice to the voiceless’. A united voice rather than different messages being communicated across the network. There are often different campaigns and movements. Different districts/countries need to be aware of what each other are doing so there is no duplication. It is important to have the wider perspective of the network and not just the local context.

2. How could the practical action be defined even better?

The local work needs to be aware of the central (Institute) and the central needs to be aware of the local. There needs to be a co-ordinated local and global communications initiative to support the process. Identify different people in charge in different parts of the world, in a directory. This would enable better collaboration and joint campaigns. Adequate notice needs to be given regarding upcoming campaigns so the people in local context can mobilise.

3. What needs to happen to achieve this practical action?

Resources need to be on hand for such campaigns for things like social media action and marketing. These things need to be done in advance by the Institute, and then the districts can amend and make their own plans that suit local context. There needs to be a strategic group of leaders in place, like this group to agree on particular campaigns. District and local campaigns need to be planned well in advance so that there is only one campaign running at any given time.

Goal 1 – Specific Practical Action:

‘Share Learning, good practice and ideas across the network’

Members: Ilaria Ladeluca, Dante Gonzalez, Br Michael Zoe, Rosa Agama, Br Chris Patino, Maria Emilia Marra

1. Why does this practical action matter so much?

The ideas, the experiences are many. We must find a way to share with more force so that there are no repetitions so that we are all aware of what is being done. Ideas need to be shared and put into practice.

Our Institute is one of the largest in the world and has produced and produces many documents. Many of which, even though they have been published, have not been studied by the different districts. Not everyone really has an idea where the Institute is headed. An evaluation of what we already have is necessary. Make an evaluation throughout the world.

Districts must feel part of a whole, of a common initiative. How many districts in Africa feel part of some initiatives? They just don't feel a part. There is no common motivation, no common movement.

2. How could the practical action be defined even better?

Finding a way to update and implement the corporate brand was a terrible question. The brand was in place, everything was ready, but it was difficult for each district and each region to be able to put it into practice, now, after 4 years, it is gradually improving. Update the common work mission idea.

It is important to think of a space to interact and to be able to know what we do, what we have learned, what difficulties we encounter, to interact to share, to build a supportive space ... to share learning to nurture growth. Create a movement of ideas, relationships, some assemblies. Create a movement to create relationships between Lasallians. Technology is a bridge.

3. What needs to happen to achieve this practical action?

Evaluate each reality, it would be good every so often to meet all those responsible for communication to confront each other. Workshops can be done and this is missing.

The documents we already have are not circulating, they are not known. How to help circulate the resources we already have? How to make it reach everyone? Finding a way to create opportunities for reflection.

Assume that all of us who collaborate have something to share: difficulties, achievements, learnings. So if we interact, we will be able to deepen some issues, how they are working in Africa, the new challenges of rights. Make a kind of diagnosis, reflection from contacts, encounters. In a virtual way, according to arguments, face-to-face meetings.

Goal 2 – Specific Practical Action:

‘Strengthen brand and communications, including ‘telling the story’ even better and improving the language in the emerging strategy’

Members: Br Craig Franz, Tracy Adams, Alisa Macksey, Br Alex Gonzales, Ever Martinez, Br Paulos Mesmer. Ttranslators: Br Agustin Ranchal and Br Michael French

1. Why does this practical action matter so much?

“Before every good action, there must be good communications”.

The Institute has the ability to make a big difference as it is so large, but we are not using it effectively. We need to coordinate it better and improve our external communications to get our story heard.

In Kenya, they were able to secure 100 laptops when the story of need was put around the system.

Our Institute is large which does lots of things, but we are not using the energy in the best way. Unfortunately, we are keeping ourselves at a low levels of performance, informing each other ineffectively, and failing to communicate well together. That is why we need to take this action.

2. How could the practical action be defined even better?

We need to be clearer on “what story are we telling?” – we need to come up with an “elevator story” we can share with everyone around the world that says who we are.

Our challenge is “what story are we telling?”; is our story about financial need, network, education?

What exactly are we collaborating on? Fundraising? Visibility? (echoes thoughts above)

While brand is critical and makes an emotional connection, we need to consider what the brand stands for. The reality is that we have a multiplicity of brands which operate underneath the main brand. Brands can define not only what we are at the moment but what we hope to be in the future. As such a brand can and should look outwards? We should not assume that everyone knows what we stand for.

3. What needs to happen to achieve this practical action?

Brand and communication are highly connected. Communications need clear and recognizable branding, and branding needs to communicate to individuals at a personal level.

We need to create a communications strategy that includes ideas related to branding, internal communications and external communications.

The Generalate is working to put together a comprehensive guide to the brand of the Institute. We have national brands and international brands. “We are a house of brands and not a single brand.”

In some areas the strategic plan is well understood but poor communications cause the collaborators to fail – both collaboration and communication are important.

We might need to come up with an “elevator story” we can share with everyone around the world that says who we are. If we all share the same story, there will be global strength in the brand. How do we leverage that strength in telling our story? We need to explore the possibility of a communications strategy. We are too many little islands and we need to share marvelous stories which are out there.

Our institution is very rich and yet very isolated – lots of independent islands. We need to have “One La Salle” when we walk together we can be much stronger.

A brand should ultimately be about feelings – how it makes us feel and how it makes others feel. If we don’t get some robustness around the brand we can’t really move forward with the communications. The brand is about strategy. It should produce a visceral response. The 300 year anniversary of the Institute was an example of how we have a unified strategy we can achieve great things.

Goal 2 – Specific Practical Action:

‘Develop more streamlined processes, policies and systems’

Members: Liz Jodice, Laura Ballerini, Br Antone Oloo, Br Andres Goveia

1. Why does this practical action matter so much?

- a. People move on but organisations, systems and policies stay.
- b. Consistency requires policies etc., so actions do not just depend on the individual.
- c. Policies etc. help us know HOW to collaborate.
- d. Policies etc. provide clarity so we can collaborate comfortably.

2. How could the practical action be defined even better?

- a. Make clear that processes etc. have to be sensitive to cultural differences.
- b. They have to be expressed in each of the languages - the same words may not have the same meanings.
- c. Use more Lasallian vocabulary – e.g. add "criteria", a word we hear a lot.
- d. Provide examples of what we mean by this action.

So (though this was not tested on the group) a revised action could be: "Develop in each of our languages more streamlined processes, policies, criteria, frameworks and systems for collaboration, such as how messages are shared across the network"

3. What needs to happen to achieve this practical action?

We took the example of a message from the Chapter to be shared widely:

- (i) Standardised processes or frameworks for sharing the message
- (ii) Champions in each region for the sharing

This was only a start with one example.

What next? Scheduling meetings beyond this year: ensuring that after the capacity building programme there is more than just a booklet put on a shelf.

Goal 2 – Specific Practical Action:

‘Develop shared global metrics to document our engagement and capture the difference we make’

Members: Br Raoul Traore, Br Vinicio Gonzalez, Jordi Jover, Lucia Murillo, Ever Martinez

1. Why does this practical action matter so much?

It allows offering objective and qualitative criteria for action. If it is not measured, things cannot be improved. Developing impact indicators allows us to more accurately see ourselves and see the differences with other external organisations.

2. How could the practical action be defined even better?

It will make it possible to establish indicators of success and differentiation. It will be a way of how we can have a photograph of La Salle Global. It makes it easy and replicable.

3. What needs to happen to achieve this practical action?

Offer a tool such as the Database that allows knowing the projects we work on, their financing, monitoring, etc. The said tool must be updated and maintained by valid and direct interlocutors from within the Institution. Reflect on the opportunity to create a Lasallian Council of NGOs.

Goal 3 – Specific Practical Action:

‘Develop new internal and external collaborative relationships to increase funding, including work with two partners on a Lasallian project, practically building our ability to forge strategic relationships’

Members: Br Armin Luistro, Roland Yao, Mark Freund, Br Santiago Mancini, Br Jose Manuel Saurus, Angela Mutulli

1. Why does this practical action matter so much?

All agreed that this is essential to contribute to sustainability of mission.

2. How could the practical action be defined even better?

Needs to be based on a deep understanding of local context. There needs to be clarity on our compelling case, e.g.

- i. Specific needs – in one area or institution or
- ii. Broader cross – network need

3. What needs to happen to achieve this practical action?

- a. Need to create partnerships to build our capacity to attract funds, as well as direct funding partnerships.

- b. For success, communication is essential – in order to successfully increase funding, and to effectively engage in the Lasallian network (culturally this is crucial).
- c. Potential to proactively strategically leverage to achieve long term fundraising objectives, away from a reactive approach.
- d. Specific suggestion –
 - i. the concept of priority projects for the Institute and communicate these as a key to message.
 - ii. leveraging alumni network.

Goal 3 – Specific Practical Action:

‘Develop capacity building opportunities for current and future leaders’

Members: Julia Mayer, Eleonora Munaretto, Br Simon Thiem, Br Nestor Anaya, Miguel Novais

1. Why does this practical action matter so much?

Leaders serve as examples and role models, they lead the way by sharing their convictions and knowledge. The Institute is changing and it is important to provide support to the new leaders coming through. If we manage to make our Lasallian communities reflect on how they can participate in the movement we can therefore use their specific gifts and talents and give them responsibility and thereby engage them in the mission to realise and take advantage of people’s potential.

2. How could the practical action be defined even better?

Engaging suitable people with specific talents to engage in a shared leadership. It is the concept of community – about the idea that within the community everybody can find a way to contribute but sometimes we do not encourage or allow it.

3. What needs to happen to achieve this practical action?

Nothing recorded as yet. Time was spent on the first 2 questions.

Goal 3 – Specific Practical Action:

‘Through developing innovative partnerships, Generate a Global Scholarship Fund that enables diverse voices and understandings to benefit, be heard and welcomed from within and beyond the network’

Members: Alejandro Galvan Illanes, Br. Carlos Gomez, Scott Kier, Julie Alibrandi, Peter Stemp

1. Why does this practical action matter so much?

Good at reacting to specific causes, projects, emergencies. However, missing opportunity to leverage network strategically to achieve larger long-term Institute goals.

If we had a long-term, clear objective that everyone understands, could this help us all fundraise/activate our networks for the same cause?

It is difficult without a clear purpose. This needs to be measurable and tangible. In the current reality this is becoming needed.

A scholarship fund in this global context is relevant. Important to try to make this clearer. Need to answer to stakeholders about how the funds would be used: transparency. Pandemic has shown that this type of action is needed. We should capitalize on this reality. Now we need to move to the how: collection? How to use it?

We need to learn from the pandemic. Things will be more difficult for the near future. Need to provide other reasons why people should be engaged. Pandemic exacerbating social conditions that makes educating the poor extremely difficult. Funds are needed. Transparency on where the funds were needed. Global scholarship fund and specific project on way funds will be used.

Need more conviction regarding fundraising.

There is a culture of endowment in the United States which allows for this type of long-term investment, donation. We need a tangible benefit. This could be more enrollment.

Get information from Solidarity. Usually on Emergency. Need perhaps dual parallel strategy. International vision on something concrete to work over the long-term.

In general, how do we move from reacting to fundraising proactively to support things that we want to invest in over the long-term? Global Scholarship Fund is something that most schools and regions can understand, it is really an example of a shared idea. How do we do this and also recognize need for transparency and tension between local needs an international/global needs?

2. How could the practical action be defined even better?

Two different parallel tracks emergency and long-term. This might help the Institute to meet immediate needs (reactive) while also addressing long-term (proactive).

Remind base that global fund is for a global institution. This is La Salle. Everyone needs to understand that the Institute is global. How to communicate this global vision? There are also compelling local needs that need attention. Why is global vision more important than what's happening locally? Go back to this vision about La Salle and the Brothers thinking outwardly. If they did not have that vision, the global institute would not make sense.

Also, easier to see tangible results in local schools to show impact. How to communicate tangible impact globally? Communicate throughout all channels that this is a global goal.

Need a plan to keep this in front of our Ministries weekly and monthly basis. It can't be on a monthly basis. Why can't we create an educational /communications programme that keeps this in front of all of our ministries throughout the world? Relevant communications plan to keep it up front. Can we create human resources opportunities to leverage resources?

3. What needs to happen to achieve this practical action?

Communications has to be visible, relevant and continuing.

It is really difficult to have one culture of collaboration. How to share the story? Also funding model is different. In Latin America, tuition is the driver of financing. Need to break these cultural barriers. Solidarity can communicate the impact through sharing stories and impact of specific projects as well.

MAKING COLLABORATION COMMON

Our Emerging Strategic Goals and Practical Actions

CREATE A MORE COLLABORATIVE CULTURE

To achieve our collaborative aspirations, we need to be more *integrated* in our approach and actions across the Lasallian network and to do this...

- We will create a *dynamic, energised group* that is working productively in support of global action
- We will create a *working environment and culture* in which trust, respect, sharing, supporting, and listening to all is highly valued
- We will create a culture of *peer-to-peer exchange, learning, and sharing* to provide quality education

1

PRACTICAL ACTIONS MAY INCLUDE:

- Create an *overarching global initiative*, focused on collaborative culture, that will generate new support professionally, educationally, and financially
- Proactively arrange the network to participate in promoting and engaging three *institute-wide campaigns each year*
- Establish new ways to *share learning, good practice, and ideas* across the network
- Circulate *leadership statements* on a regular basis that nurture and reinforce collaborative intent

PRACTICAL ACTIONS MAY INCLUDE:

- Take a *strengths-based approach to generating a dynamic strategy and structure*, from which we will be able to develop clear global criteria about priorities for action. Promote one project in a different region each year.
- Develop an *overarching brand and communications strategy* which more efficiently networks the Institute and its Secretariats, Districts, NGOs etc.
- Develop *processes, policies, and systems*, including for sharing and collaborating about network-wide information
- Develop *shared global metrics* which document our engagement with people and that capture the difference we make

2

CREATE SUPERLATIVE ORGANISATIONAL STRENGTHS

To achieve our collaborative aspirations, we need to be more *efficient* across the Lasallian network and to do this...

- We will create a *dynamic strategy and structure*, supported by a capacity development programme, that encourages and enables participative and distributed leadership throughout the network
- We will create a *strengthened brand and approach to communications*
- We will create more *streamlined processes, policies, and systems, including information flows and metrics*

CREATE A MORE CONNECTED NETWORK

To achieve our collaborative aspirations, we need to be more *effective* across and beyond the Lasallian network, to do this...

- We will create different forms of *internal and external collaborative relationships*, including strategic alliances, to increase funding
- We will create opportunities for *diverse voices and understandings* to be heard and welcomed
- We will create *capacity building opportunities* to ensure current and future leaders have the skills needed to advance the network effectively

3

PRACTICAL ACTIONS MAY INCLUDE:

- Develop enduring internal and external collaborative relationships, including alliances, in *funding initiatives*
- Work with *two new partners* on a Lasallian project during the year, thus practically building our ability to forge strategic relationships
- Through developing innovative partnerships, generate a *global scholarship fund* that enables diverse voices and understandings to benefit, be heard and welcomed from within and beyond the network
- *Engage leadership* at all levels to be able to form strategic partnerships as part of the capacity development programme