



World Vision

Transformation at Australia's Largest Charitable Group

This is the presentation from the Change Network, June 2011.
To register for future events or to find out more about the Change
Network please go to

www.bevingtongroup.com/change.htm

- ❖ About World Vision
- ❖ Case Study: Restructuring in World Vision Australia

- ❖ World Vision Australia is part of the World Vision International Partnership
- ❖ Christian relief, development and advocacy organisation operating in more than 90 countries
- ❖ Assists 100 million people worldwide including 2.4 million children.





❖ Some Examples of our work



Together we can end preventable deaths



**DON'T
TRADE
LIVES**

Campaigning to combat human trafficking and slavery

EVERY MINUTE COUNTS
MAKE POVERTY HISTORY



Long-term development addressing poverty in more than 60 countries, including Australia

World Vision



KIDS HOPE AUS®

Linking Hands

Indigenous Partnerships





Japan Earthquake & Tsunami 2011

A 9 magnitude earthquake off the north-east coast of Japan on Friday 11 March triggered a 10 metre tsunami that caused extensive damage. Over 50 million people were affected and thousands of people were reported missing after entire communities were washed away. A nuclear emergency has also been declared following explosions at various nuclear plants in the Fukushima area.

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A man surveys the damage and destruction caused by the Earthquake and Tsunami in Japan on 11 March, 2011 | Reuters/Toru Hanai, courtesy Trust.org - AlertNet

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Pakistan Floods

Emergency Appeal

[▶ Donate](#)

EMERGENCY APPEAL - HELP NEEDED





Case Study: Restructuring in World Vision Australia

Transforming the Policy and
Programs Division

The Other Side of Complexity

Child-centred, integrated community development

- ❖ **We seek measurable and sustained change to support the most vulnerable members of communities**
- ❖ **Our field work is based on the integration of relief, development and advocacy**
- ❖ **We engage in transformational development with communities, respond to emergencies and use advocacy to address the structural and systemic causes of poverty**



- ❖ **Support and Implement Best Practice Programs**
- ❖ **Influence Humanitarian and Development Policy & Practice**
- ❖ **Build a Social Movement**
- ❖ **Garner Resources**
- ❖ **Be Accountable for stewardship, promises made & outcomes achieved.**

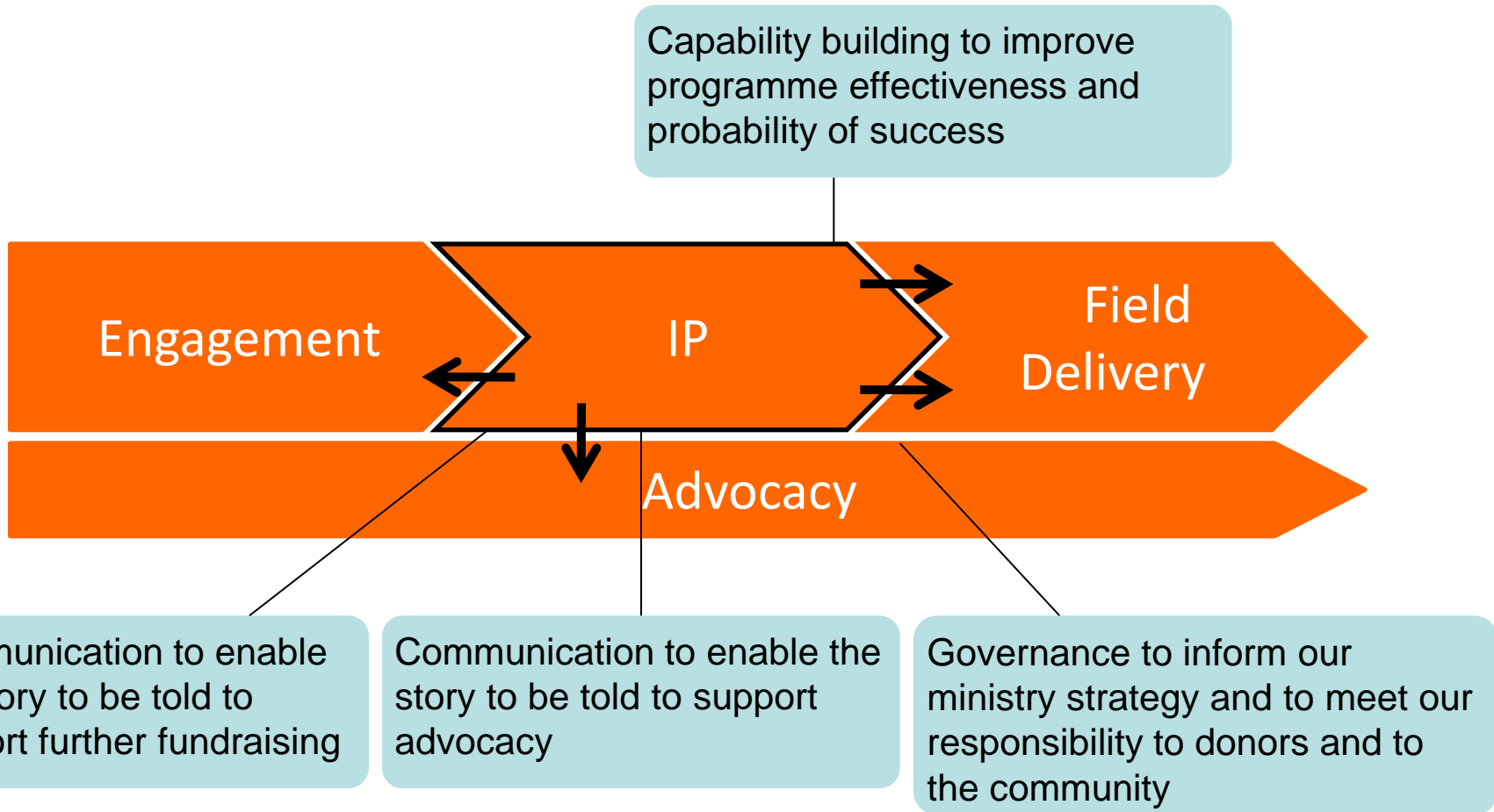


Our operating context is changing so the imperative to be more adaptive and agile to respond to a fast changing, complex environment is clear

- ❖ **Goals versus capacity: needing greater focus and prioritisation**
- ❖ **From Charity to Root Causes**
- ❖ **From Planning to Learning our way to Transformation**
- ❖ **Increased Accountabilities**
- ❖ **More informed supporters**
- ❖ **Greater competition**



We suspected that there were material opportunities to improve the International Programs area



“I would not give a fig for the simplicity this side of complexity, but I would give my life for the simplicity on the other side of complexity.”

Oliver Wendell Holmes (1809-94)

Three standard Bevington Group techniques were deployed to help us

- ❖ **XeP3 process and role analysis**
- ❖ **XeP3 Idea Generation and To Be design**
- ❖ **The RAPID restructuring workshop**

Using the XeP3 methodology we captured more than 2500 process steps

XeP3 World Vision Aust Tasks and Activities **MF2**

Status: AU1 - Regional Team Manager - Asia	
Completed by: <input type="checkbox"/>	
Team Member Check: <input type="checkbox"/> Date: Thursday, 20 May 2010	
Quantified Tasks	Main Activities
A) Manage implementation of Field Ministry Strategy	1. Participate in mid-term and 3-Yr planning and review of strategy with IP management team 2. Produce annual reports on program outcomes 3. Manage Regional Team participation in annual FARsight process 4. Conduct DMET project review
B) Manage key stakeholder relationships (regional and NO)	5. Participate in FEDNet (Federation Network) initiative 6. Contribute to development of regional and NO strategies 7. Support CPCs in managing NO relationships 8. Assess value add to the region
C) Manage team of 10 staff	9. Manage Performance Management of staff 10. Conduct staff training and development 11. Handle staff issues 12. Recruit New staff 13. Manage leave requests and weekly timesheeting 14. Manage Interns as required
D) Provide hands on support to CPC during their in-country visits (2 trips (2-3 weeks long) per year)	15. Prepare for visit 16. Conduct in-country visit
E) Manage team operational (including budget)	17. Manage annual forecasting for expenditure 18. Monitor monthly actual expenditure to budget 19. Authorise expenditure within delegated authority 20. Approve projects in Project Master 21. Plan and authorise leave and training requests
F) Perform additional duties in absence of Head of IP	22. Perform additional duties in absence of Head of IP
G) Manage backfill of staff	23. Conduct activities on behalf of team members in their absence, or when understaffed/ inexperienced 24. Perform duties on behalf of peer managers in their absence
H) Provide technical input and support for Partnership/ internal initiatives (eg LEAP process, Climate Change etc)	25. Provide training and mentoring for area of technical expertise (LEAP reports and Field Monitoring) 26. Participate in research on issues impacting effectiveness of programs 27. Participate in general improvement activities within WVA

XeP3 World Vision Aust Tasks and Activities **MF2**

Status: AU1 - Regional Team Manager - Asia	
Completed by: <input type="checkbox"/>	
Team Member Check: <input type="checkbox"/> Date: Thursday, 20 May 2010	
I) Conduct proactive grant acquisitions (as required)	28. Conduct proactive grant acquisitions
J) Participate in government/ inter-agency activities (as required)	29. Participate in government/ inter-agency activities
K) Provide responses to ad hoc requests for information	30. Handle queries
L) General Admin	31. Attend Meetings 32. Prepare for and help facilitate Homeweeek 33. Professional development
Main and Sub-Activities	
A) Manage implementation of Field Ministry Strategy	4 Conduct DMET project review 4.1 Conduct DMET project review
1 Participate in mid-term and 3-Yr planning and review of strategy with IP management team	B) Manage key stakeholder relationships (regional and NO) 5 Participate in FEDNet (Federation Network) initiative 5.1 Participate in meetings 5.2 Conduct (WV) self assessment 5.3 Conduct (NO) partner assessment 5.4 Contribute to preparation of narratives 5.5 Sign off Asian partner assessments 5.6 Reprioritise BAU tasks and activities in order to fulfill requirements of the activity 5.7 Agree commitment to relationship agreement and operational capacity plan
1.1 Prepare data and inputs for review process in consultation with team and other stakeholders	6 Contribute to development of regional and NO strategies 6.1 Provide comments on regional strategy 6.2 Support CPCs in providing comments to the NO strategies 6.3 Participate in (WV) self assessment for FedNET 6.4 Participate in regional meetings 6.5 Prepare for RWG 6.6 Attend RWG
1.2 Research and analyse data to provide insights	7 Support CPCs in managing NO relationships 7.1 Read NECA to stay up to date with country specific knowledge (Internal country information resource)
1.3 Customise and refine WVA priorities for the region	
1.4 Produce report on finalised strategy going forward	
2 Produce annual reports on program outcomes	
2.1 Annual reporting WVA strategy	
2.2 Chase up information in order to produce FMS report (not clear where information should be stored, process not documented well)	
2.3 Produce annual reporting FMS	
3 Manage Regional Team participation in annual FARsight process	
3.1 Conduct Budget to Actual reconciliation to inform FARsight process and tracking to date	
3.2 Set priorities	
3.3 Review and decide concepts with regional team	
3.4 Represent team submission at FARsight meetings	
3.5 Provide feedback to team re outcomes	

By taking a structured approach we were able to quantify the size of the problems (e.g. Noise)

Support 28%

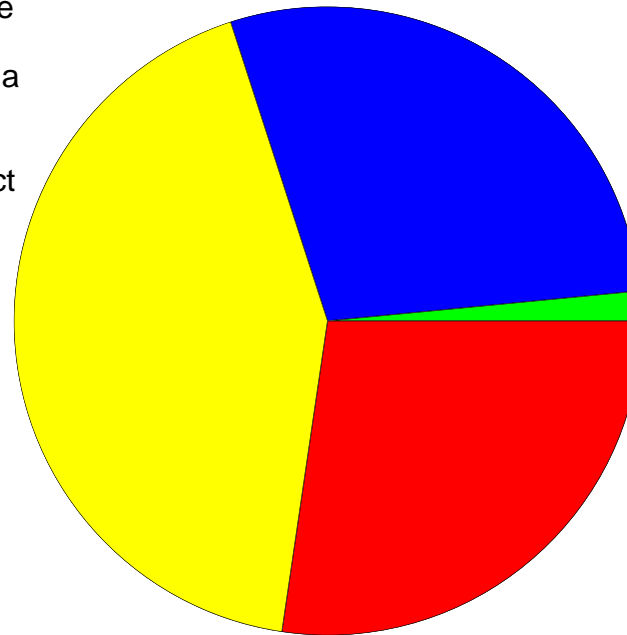
EXAMPLES

- Consider whether specific funding can be targeted (fit and feasibility)
- Receive up to 50 narrative reports twice a year
- Post all docs on DocStore
- If required, source consultants to conduct appropriate evaluation/s

Discretionary 43%

EXAMPLES

- Conduct Budget to Actual reconciliation to inform FARsight process and tracking to date
- Read NECA to stay up to date with country specific knowledge (Internal country information resource)
- Contribute to preparation of narratives
- Conduct staff professional development training (usually for own specialty area)



Noise 27%

EXAMPLES

- Receive second draft from NO and make further suggestions
- Respond to queries from Program Support re missing information on Project Master
- Prepare additional reporting for AUSAID
- Document justifications for overspends and underspends to avoid losing the funding in subsequent year
- Try to work through NO issues on Skype

ALL AUs (Roles)
5434 hrs/mth

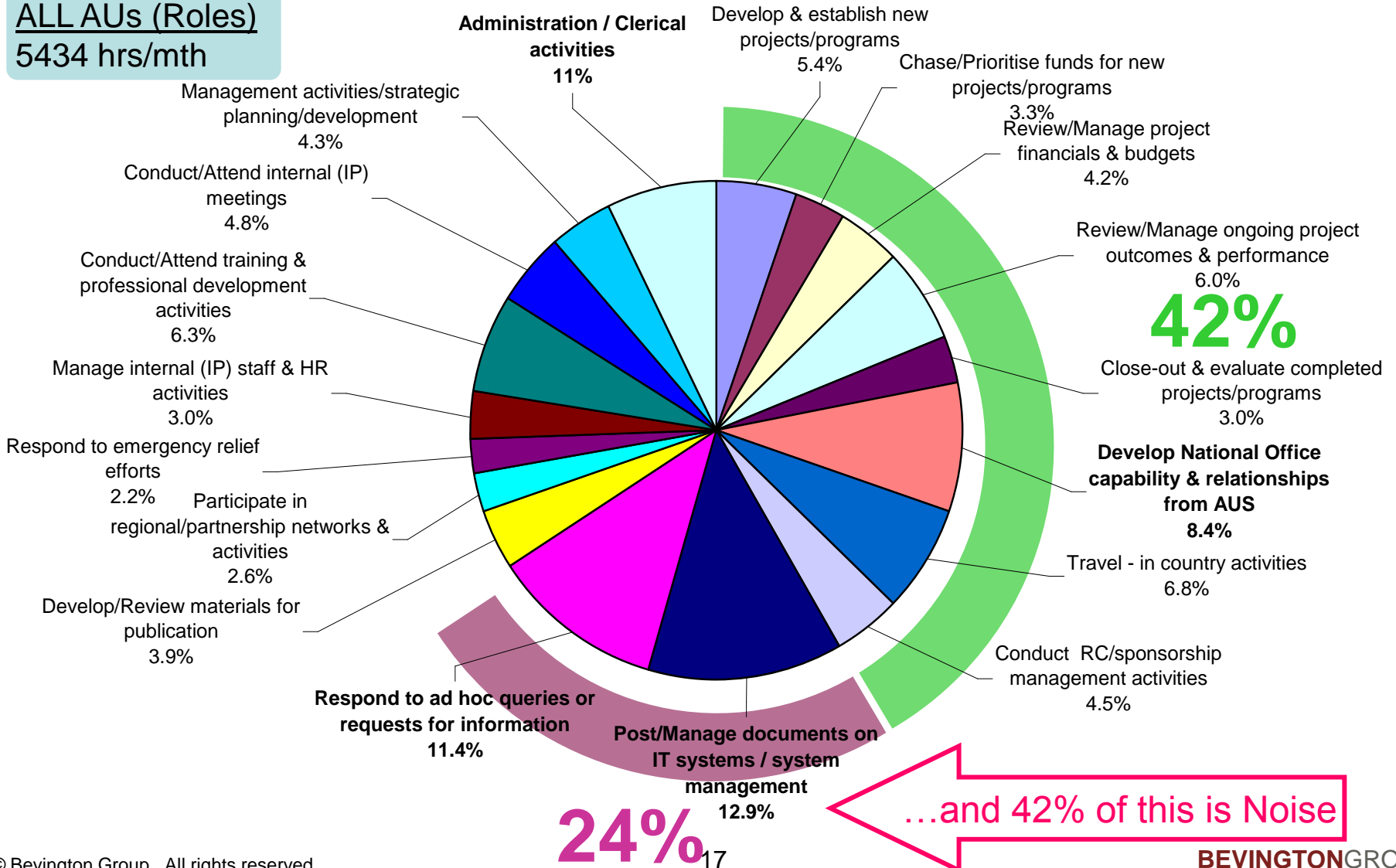
Core 2%

EXAMPLES

- Receive opportunities and engage grants team/ technical teams
- Provide guidance on how to best pitch the concept
- Participate in/coordinate wider Regional Initiatives (eg Human Trafficking; Maternal & Child Health)

Analysing Noise and reviewing the content of the roles allowed us to see the scale of our opportunity

ALL AUs (Roles)
5434 hrs/mth



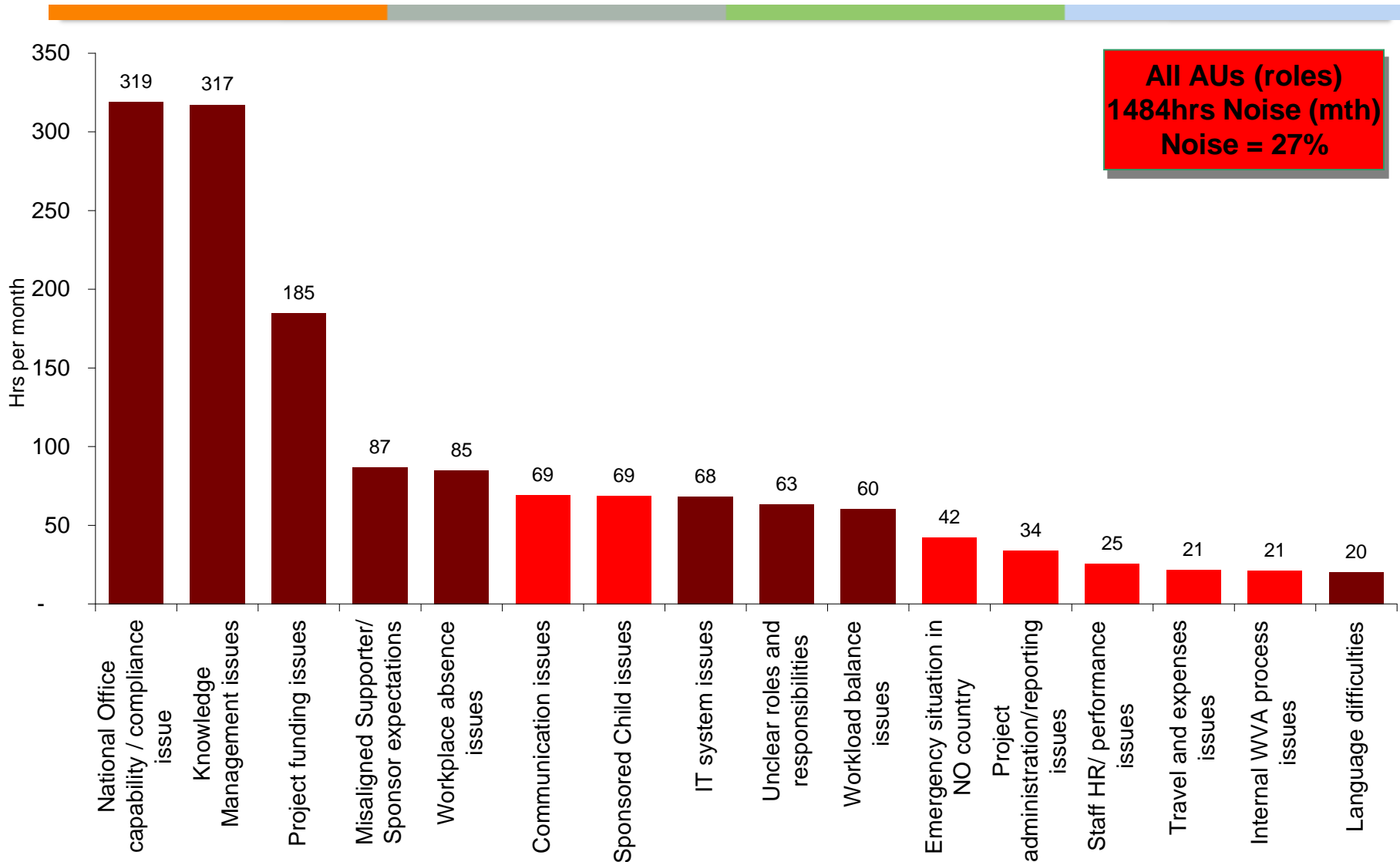
We found that the top 20 Noise drivers account for 53% of the total Noise

Rank	Top 20 Noise drivers	Noise Hours (mth)	% of Noise Hours
1	Extraneous requests/queries from supporters/sponsors	86.6	5.8%
2	CPC possesses specific project knowledge	65.9	4.4%
3	Project spend not tracking to planned budget	61.8	4.2%
4	Large volume of emails	54.0	3.6%
5	Insufficient coverage for workload when travelling abroad	49.2	3.3%
6	Numerous tasks with competing priorities	44.0	3.0%
7	Problem reported with existing data solution that requires resolution	43.2	2.9%
8	Inadequate Design received from NO	42.4	2.9%
9	CPC insufficiently skilled with Project Master	32.0	2.2%
10	Project financial reports not logged (by NO) in clear systematic locations	30.9	2.1%
11	Reworked document from NO still inadequate	30.7	2.1%
12	Additional funding required to resolve an issue with a project or country	28.4	1.9%
13	APR review not received on time from NO	28.3	1.9%
14	Specific initiative requires commitment on top of BAU	28.1	1.9%
15	Issue has developed in project or country	27.7	1.9%
16	NO does not correctly follow APR review tool guidelines	26.5	1.8%
17	Poor quality (often un-usable) RC records	26.0	1.7%
18	Manager absent	25.2	1.7%
19	Staff ask Admin officers when unsure about internal processes, responsibilities and contacts	25.0	1.7%
20	Child specific enquiry received requiring NO input	23.9	1.6%

67% of Noise is associated with the top 5 Meta Noise Drivers

Rank	Meta Noise Drivers	Noise Hours (mth)	% of Noise Hours
1	National Office capability / compliance issue	319	21.5%
2	Knowledge Management issues	317	21.4%
3	Project funding issues	185	12.4%
4	Misaligned Supporter/ Sponsor expectations	87	5.8%
5	Workplace absence issues	85	5.7%
6	Communication issues	69	4.6%
7	Sponsored Child issues	69	4.6%
8	IT system issues	68	4.6%
9	Unclear roles and responsibilities	63	4.2%
10	Workload balance issues	60	4.1%
11	Emergency situation in NO country	42	2.8%
12	Project administration/reporting issues	34	2.3%
13	Staff HR/ performance issues	25	1.7%
14	Travel and expenses issues	21	1.4%
15	Internal WVA process issues	21	1.4%
16	Language difficulties	20	1.3%
		1484	100%

And the top 2 Meta Noise Drivers account for over 43% of the Noise



Understanding our processes gave us a clear window on “interface” issues



World Vision Aust
Process Chart Report

Process 1 - Registered Child Management Date: Sunday, 18 July 2010

Step No	Step	Cat	Hours	(Meta) Meta Noise Driver	1 Regional Team Manager	2 Country Program Coordinator	10 Program Support Liaison	11 Regional Child Manager	12 Manager, Program Support	13 National Office	104 NVA Engagem ent	105 Finance	106 SSG
a)	DEVELOP NEW REGISTERED CHILD PLANS FOR ADP												
1	Develop Registered Child plan for new ADP												
1.1	Request blank formatted template for the RC Plan from Business Information & Processes	S	0.03										
1.2	Enter all known data for each ADP or A&D including the forecast of RC growth and closure	S	0.27										
2	BUILD REGISTERED CHILD DEASSESSMENT FOR NEW ADP												
2.1	If ADP is nearing completion of Design Phase, contact CPC and NO and provide information re correct process for creating the CSMP and registering the children (using template)	D	1.27										
2.2	Answer any queries from NO to clarify requirements	S	2.83										
2.4	Assist NO to make corrections where incorrect CSMP numbers have been used	N	1.48	7 - Sponsored Child issues									
b)	LOG NEW AREA DEVELOPMENT PROGRAM/ PROJECT ON PROJECT MASTER												
3	Create new project on Project Master												
3.1	One project has been approved, request PBAS number from NO (in order to set up project record)	S	2.52										
3.3	Create new project record on Project Master database recording all project information, timelines, beneficiary, sector, etc	S	16.74										
3.4	Post all project documents on DocStore including Final and draft proposals, and review tools	S	8.43										
3.5	Consult RC plans and determine where action is required	S	4.62										
3.6	If a planned ADP does not exist on Project Master (software that facilitates funding of all projects) speak to relevant CPC and ask them to enter details of ADP on system	N	0.83	2 - Knowledge management issues									
3.7	Respond to queries from Program Support re missing documentation on DocStore	N	2.04	2 - Knowledge management issues									
3.8	Assist CPCs in setting up new projects in Project Master	N	12.99	2 - Knowledge management issues									
3.9	If impractical for CPC to do this, enter details on system instead of CPC	N	1.46	2 - Knowledge management issues									
4	Handle changes to plan during Design phase												
4.1	Prior to funding commitments being made, assess milestones achieved versus plan (eg have start up documents been received?)	D	4.66										
4.2	Assist CPCs in making their budget requests through Project Master	N	18.99	2 - Knowledge management issues									
4.3	If variance from plan detected, follow up with CPC	N	3.11	12 - Project administration / reporting issues									
4.4	Respond to queries from Program Support re missing information on Project Master	N	1.78	2 - Knowledge management issues									
4.5	If plan has changed update records and schedule on PM system and any other tracking systems	N	1.85	12 - Project administration / reporting issues									
c)	MONITOR ADP PROGRESS AND BUDGET COMMITMENTS DURING IMPLEMENTATION PHASE												
5	Arrange commitment of funds to project												
5.1	Seek funding commitment (activate request to Program Support)	S	6.72										
5.2	Receive request for release of funds in Project Master and validate against ADP phase/milestone progress and funding allocation	S	4.84										
5.3	Check appropriate documents are stored on DocStore database	D	10.21										
5.4	If anomalies are detected, chase up with CPC	N	10.79	3 - Project funding issues									

Step No	Step	Cat	Hours	(Meta) Meta Noise Driver	1 Regional Team Manager	2 Country Program Coordinator	10 Program Support Liaison	11 Regional Child Manager	12 Manager, Program Support	13 National Office	104 NVA Engagem ent	105 Finance	106 SSG
5.5	If all OK, forward request to Finance for payment	S	1.46										
5.7	Each month check for outstanding commitments as yet un-requested and report this to Regional Manager for follow up	D	1.64										
5.8	Provide appropriate support to CPCs as required	D	0.28										
6	Communicate commencement of Implementation Phase for new ADP												
6.1	Confirm with CPC that the P-PDD is approved and ADP can be opened for sponsorship	S	1.82										
6.2	Once PPDD is defined, engage NO to identify Registered Children	S	1.12										
6.4	Check up E not received in timely manner	N	1.43	1 - National Office capability / compliance									
6.6	Conduct a test print of the project story to ensure all appears as desired	D	0.91										
6.7	Contact CPC to determine geographic location of ADP in country and ensure 'country map' is updated	D	0.91										
6.8	Ensure Growth Plan is up to date	D	0.31										
6.9	The design phase now having been completed, communicate with multiple internal stakeholders that the ADP is now open for sponsorship (SSG, SDI team, Special projects etc.)	S	1.3										
7	Monitor progress of ADP during implementation phase												
7.1	Receive up to 50 financial reports 4 times per year	S	0.92										
7.2	Prioritise reports to review (based on local knowledge and experience and risk)	N	1.13	10 - Workload balance issues									
7.3	Review a subset of reports	D	10.5										
7.4	If identify issues with financials, request clarification (using electronic Review Tool)	N	3.19	3 - Project funding issues									
7.5	National Office provides clarification		0.0										
7.6	If queries not responded to flag to resolve during field visit	N	1.63	1 - National Office capability / compliance									
7.7	If response not provided, prioritise next action (based on risk)	N	0.36	1 - National Office capability / compliance									
7.8	Respond to request from Finance to reconcile records between the two systems (PBAS and Project Master)	N	3.28	2 - Knowledge management issues									
7.10	If anomalies detected in cost coding and allocation amounts, chase up details and explain	N	5.62	2 - Knowledge management issues									
8	Handle Carry-Forwards at end of Financial Year												
8.1	Search through files to locate saved report on global (Partnership) Financial report database (logged by KCs themselves)	N	30.94	2 - Knowledge management issues									
8.2	If find report, insert link (or notice/comment) in Decisions that report has been reviewed	S	7.74										
8.3	Open and review report, using a template to assess compliance, and record details in a database	D	30.94										
8.4	Send an email to CPC with summary of findings	D	7.74										
8.5	Review underspends and overspends as part of EOI processing	N	5.17	3 - Project funding issues									
8.6	Handle queries re amounts unspent at end of FY that have not been identified to Finance for carry forward	N	6.22	3 - Project funding issues									
8.7	Handle queries regarding overspends at end of FY	N	2.59	3 - Project funding issues									
8.8	Document justifications for overspends and underspends to avoid losing the funding in subsequent year	N	4.94	3 - Project funding issues									
8.9	Support CPCs with formulating carry forward commitment request where required	N	4.76	3 - Project funding issues									
8.10	Answer questions from field allocation committee	N	1.01	3 - Project funding issues									
8.11	If approved, amend annual operating plan and budget with costity	N	1.06	3 - Project funding issues									
8.12	If declined, amend operating plan to address implications	N	0.33	3 - Project funding issues									

In order to fix the Noise (the problems in the processes), 182 ideas were generated by staff in a series of workshop (“bottom-up” ideas)

Examples:

Issue category	Specific Problem	Ideas
Extraneous, strange requests from sponsors/ supporters	Calls with extraneous requests forwarded to CPCs to handle (86.63 hrs per month)	Ask call centre not to forward these questions, to reduce impact on CPC time
		Improve education/training around correct procedures to be followed (SSG and IP)
		Train up subject matter experts within SSG to handle such queries
Knowledge Management Issues	Only CPC possesses specific information (61.91 hrs per month)	Improve systems that hold documentation/information, to make more accessible and reduce the need to consult CPC
		Invest in a 'Funnelweb' key-word type search engine where content/text can be searched, to reduce the need to consult CPC
		Create project summaries with general info that can be used for many purposes, to reduce the need to consult CPC

...When we considered our Top Down design principles it started to become clear we would need to restructure as well as address process

Design Principles

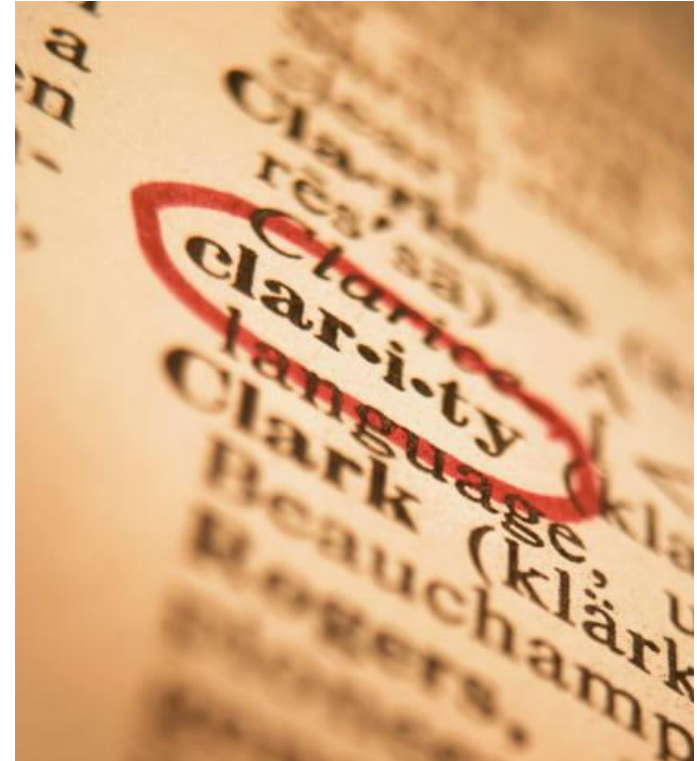
- ❖ Enhance program effectiveness and probability of success through advice and capability building
- ❖ Effectively governance spend as expected
- ❖ Provide information that improves the effectiveness of fundraising and advocacy
- ❖ Inform ministry strategy
- ❖ Activity to be coordinated and integrated
- ❖ Roles designed for focus and sustainability
- ❖ Provide an apprenticeship environment for new starters

**Capability building/shared learning is the dominant value for WVA/IP
But → the current team structure arrangements and focus of effort
does not support this mission effectively**

So, we undertook to develop a new operating model for Policy and Programs

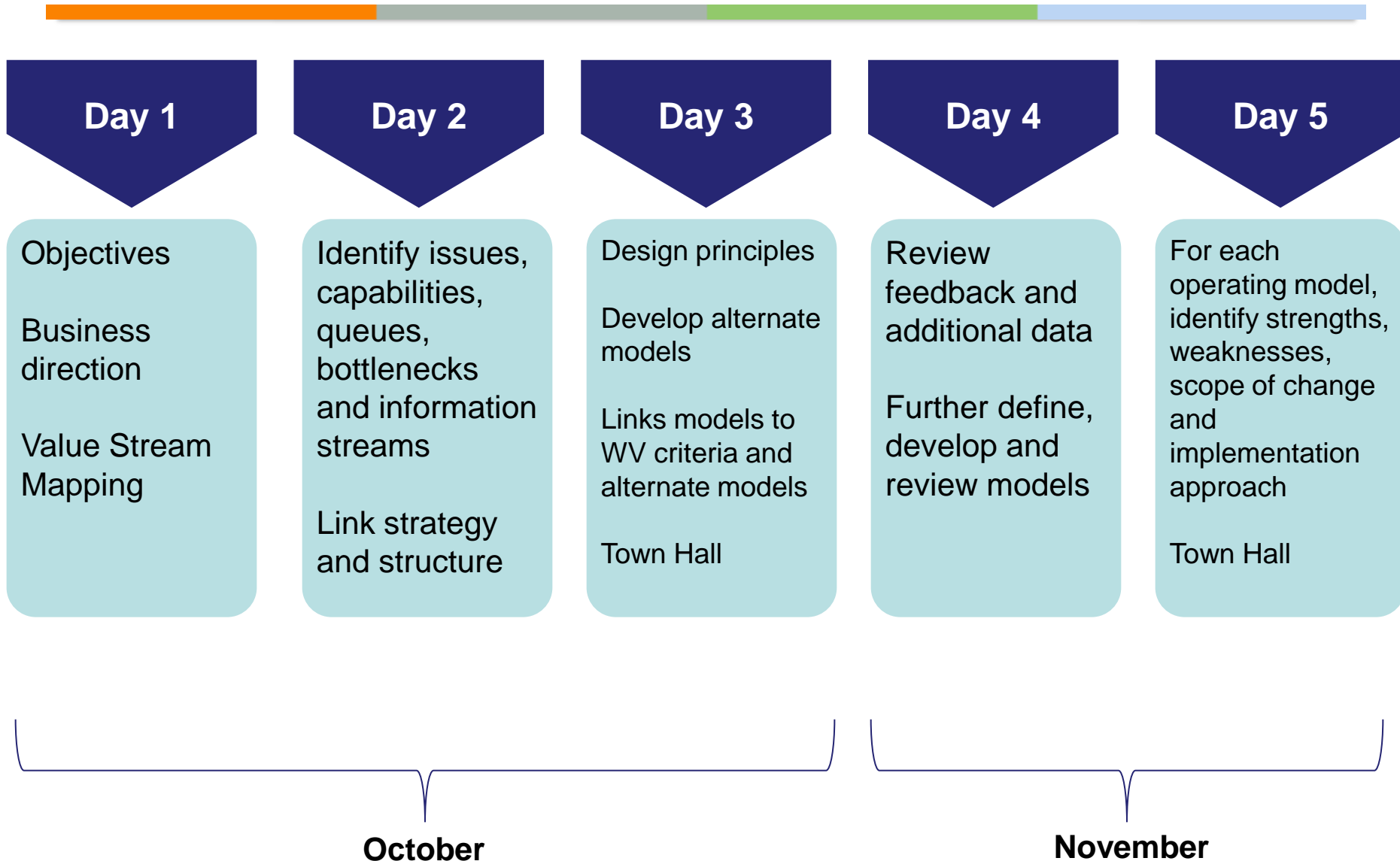
Develop a new operating model that would address recurring key themes:

- ❖ Clarity around roles, accountability, processes and decision making
- ❖ Consistent alignment/stakeholder engagement
- ❖ Improved capture of learning's



The new model aimed to bring greater 'focus' to the work we do – something staff strongly felt was needed

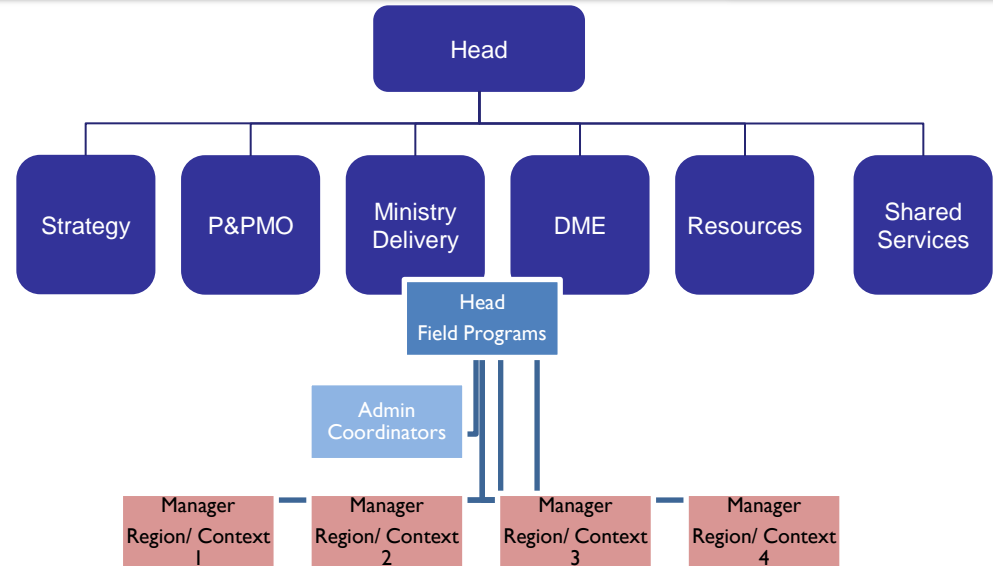
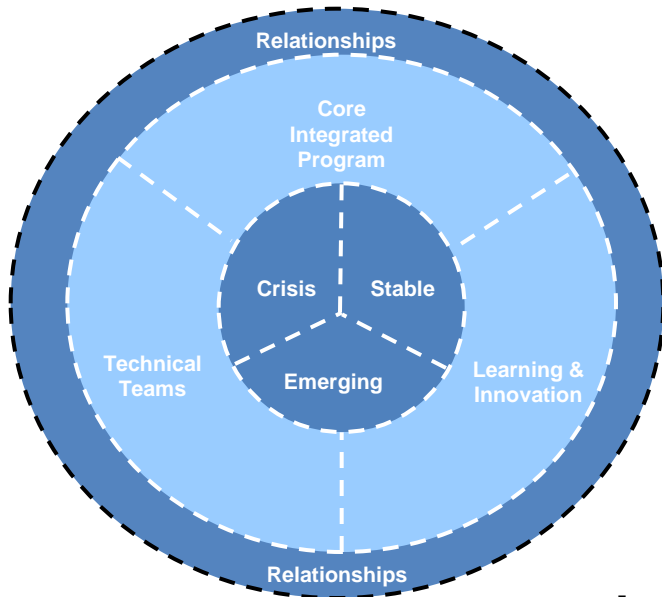
The Rapid Event was run over 5 days



October

November

Although the RAPID event produced four different models, they had common themes



In common:

- ❖ The focus on context
- ❖ Separate 'shared' strategy unit
- ❖ Australia Program incorporated
- ❖ Separating roles to focus on core competencies
- ❖ Resource allocation consolidated
- ❖ Grant management/resource acquisition unified

P&P Operating Model: Deliverables & Objectives

World Vision

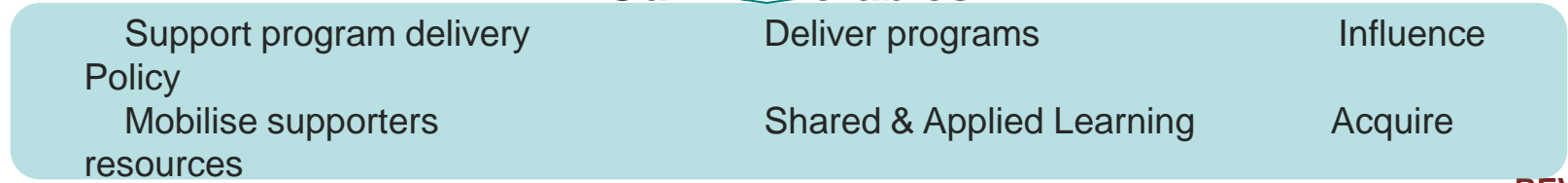
Integration Strategy & Operations



Our Objectives

- Implement Best Practice Programs
- Transformational development, including spiritual development
- Influence Humanitarian and Development Policy and Practice
- Build a Social Movement
- Garner Resources

Our Deliverables



- ❖ **Simplify and standardise processes**
- ❖ **Integrated delivery of functions and streams**
- ❖ **Maintain specialisation and capability**
- ❖ **Build in flexible capacity**
- ❖ **Establish clear roles & responsibilities/Improved decision making**
- ❖ **Consistent decision making**

Staff engagement

- ❖ Representatives across P & P engaged in various elements of the analysis
- ❖ Clear communications strategy to keep staff informed of progress, initial findings, next steps
- ❖ Owned the problem and imperative for change

Role Clarity:

- ❖ Separately mandated teams rather than all effort focused on whole portfolio

Evidence-base:

- ❖ Stronger focus on building an evidence-base
- ❖ More effective sharing of learnings & using learnings for advocacy

Innovation:

- ❖ Clearer rationale for pilot programs & process for mainstreaming pilots

Accountability:

- ❖ Positioned to improve accountability for outcomes to supporters & donors
- ❖ Focus on downward accountability to partners & beneficiaries

- ❖ **Implementation of the developed strategic themes in terms of work prioritisation**
- ❖ **Some staff struggling to implement the change**
- ❖ **Challenges in terms of meeting more complex accountabilities**
- ❖ **Management's appreciation of the extent of follow-on work**

So what do we get out of this?

- ❖ **Role clarity**
- ❖ **Focus**
- ❖ **Energy**
- ❖ **Smoother process**
- ❖ **Overall.....more effective delivery of our mission**

Overall... more effective delivery of our mission

Kenyan case-study – Chemi Chemi Women’s Water Tank Group

- ❖ **Extremely arid environment**
- ❖ **Partnered with World Vision for 5 years thus far**
- ❖ **Comprising 420 local women from 11 different tribes, resettling after inter-tribal violence in the 1990s**
- ❖ **Each member now has their own water tank and dug 6 dams collectively**
- ❖ **Purchased 3 acres of farming land for group profit**
- ❖ **Planting watermelons as a cash crop**





