

PART 2:

AN OPERATIONAL ROADMAP FOR TRANSFORMATION

TIM  Transforming INGO
Models for Equity



INTROSPECTION TO ACTION

TIME is a collaboration-based initiative that seeks to explore how SRHR (Sexual and Reproductive Health and Rights) international NGOs can and should rethink how they operate and contribute to equitable development.



Phase 1

COLLECTIVE UNDERSTANDING

In 2022 we asked the question “what are the current relationship dynamics between SRHR INGOs and CSOs working in sub-Saharan Africa?” [The answers](#) told us that while INGOs will continue to be relevant, they also will need to change.



Phase 2

BUILDING SRHR INGO CONSENSUS

In response, in 2023 18 SRHR INGOs came together to go through a process of introspection. Recognizing that change is required across multiple levels, we developed a model and established three working groups to identify actions that INGOs could take to respond to CSO input and to operationalize LLD.



Phase 3

TRANSFORMING TOGETHER

The next step is to return to our CSO partners and funders and begin a proactive dialogue around whether these changes will in fact shift power to local entities while ensuring that INGO operating models are relevant, sustainable, and legitimate. We hope that in turn this will lead to a sector-wide transformation process that is well resourced and that allows for practical action to shift power, agency, and ownership.

CHANGE MODEL

TIME is a practical test in operationalizing transformation within a complex system. Three working groups explored complementary and interconnected elements of change at different levels. Each working group identified a core change that needs to happen at the individual, organizational, or sector level respectively for transformation to occur. They then worked together to develop practical frameworks and tools.



SECTOR: VISION

SRHR INGOs need a **vision of the role INGOs should play in advancing the field of SRHR** to be more equitable, resilient, and accountable.



ORGANIZATION: ROADMAP

SRHR INGOs need an **adaptable, multi-dimensional roadmap to provide guidance and direction** for organizations seeking to transform how they work for greater equity.

INDIVIDUAL: CORE CONCEPTS

SRHR INGO leaders and practitioners need a **common language to be able to discuss and debate the core concepts of why and how they must change** for greater equity.

METHODOLOGY ●

Over the course of six months, SRHR INGO practitioners met to answer the question “how do INGOs begin to transform how they operate?”

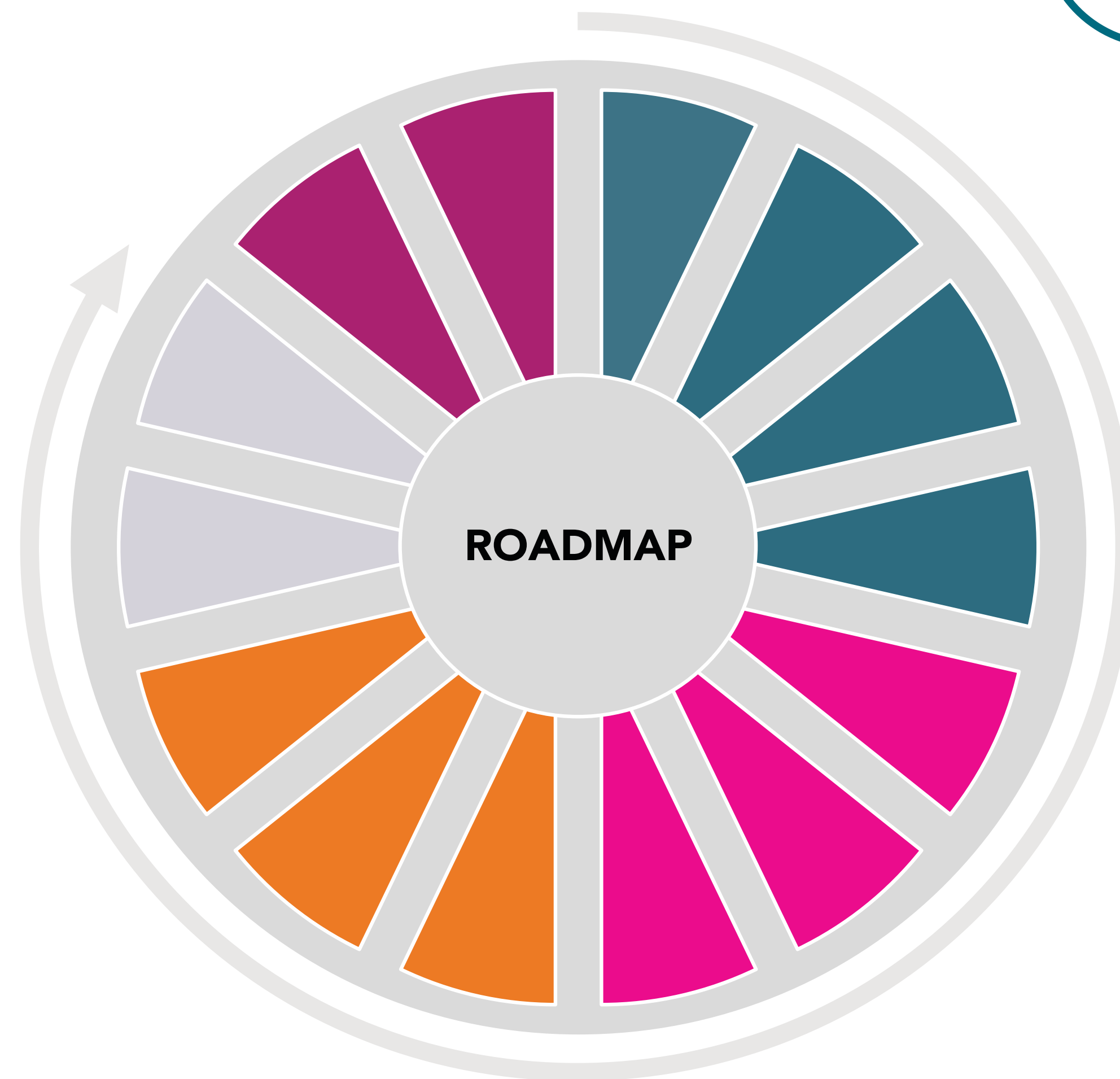
The working group was clear that there will never be one roadmap to equitable or locally led development but agreed that there was real value in working together to collectively shape a process for evaluation, introspection, and planning.

The goal was to build an adaptable, multi-dimensional roadmap to provide guidance and direction for organizations seeking to transform how they work for greater equity.

The group:

- 1. Developed a change management approach**, laying out a five-step process to increase the chances that organizational transformation is intentional, deliberate, and holistic.
- 2. Built an operational roadmap** that sits within the five-step process, which includes 14 operational areas that will need to be continually assessed individually and holistically.
- 3. Drafted guiding questions** that INGO leaders should ask themselves as they evaluate each operational area.

Note: This document reflects the work of a committed working group that met from July-November 2023 and serves as a starting point for introspection, discussion, and action. As the frameworks and discussion questions are tested and piloted in the real world, TIME will work to update them accordingly to ensure they are as relevant, nuanced, and impactful as possible.



THE TRANSFORMATION PROCESS

How should organizations approach transformation? Complex change initiatives require a deep level of self-awareness and deliberation. This five-step process offers leaders a framework to approach their journey to more equitable, locally-led development.

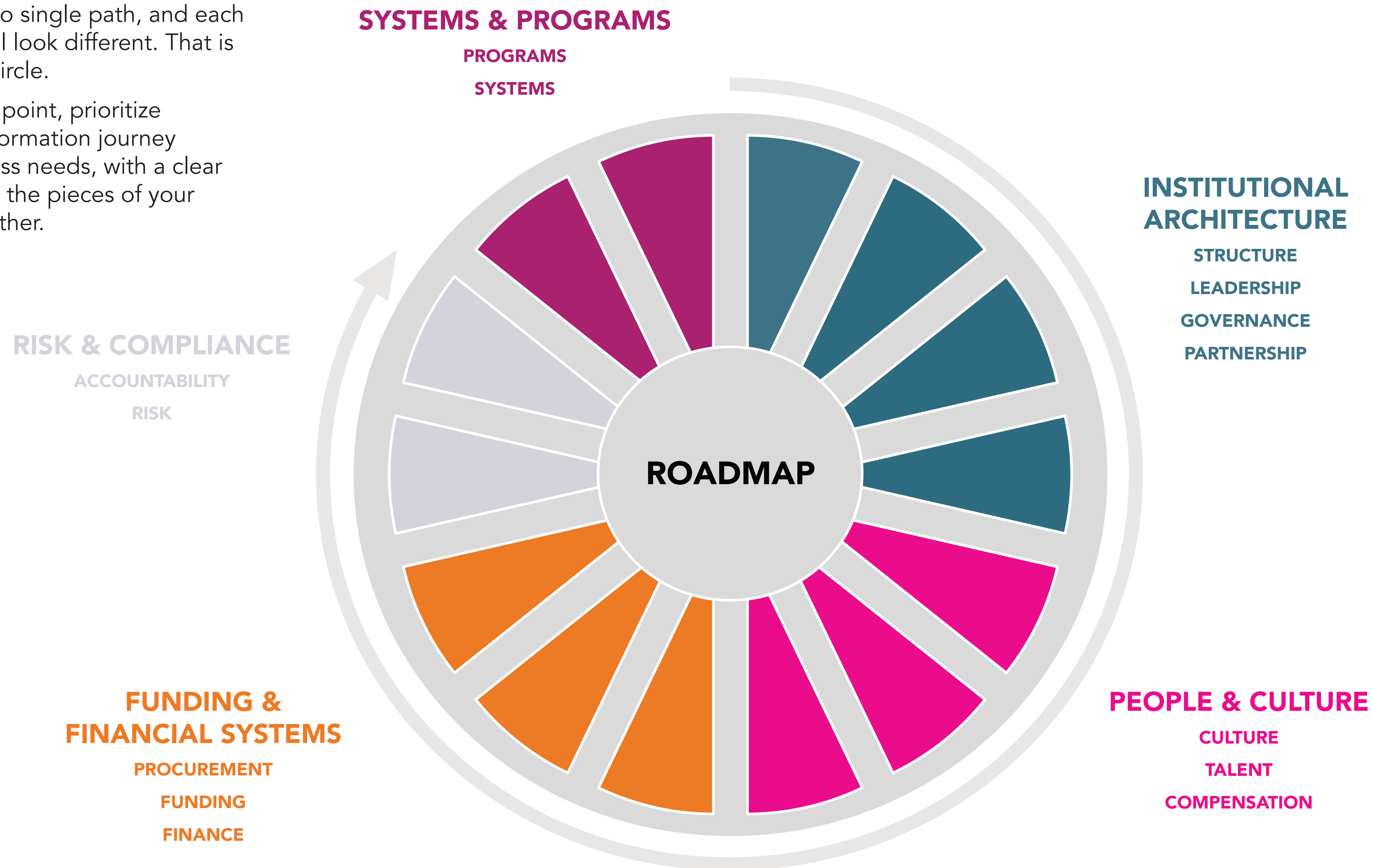
Assess where your organization is today, identify where you need to go, and plan how you will get there.



OPERATIONAL ROADMAP

Is there a roadmap to equitable, locally-led development? There is no single path, and each organizations process will look different. That is why this framework is a circle.

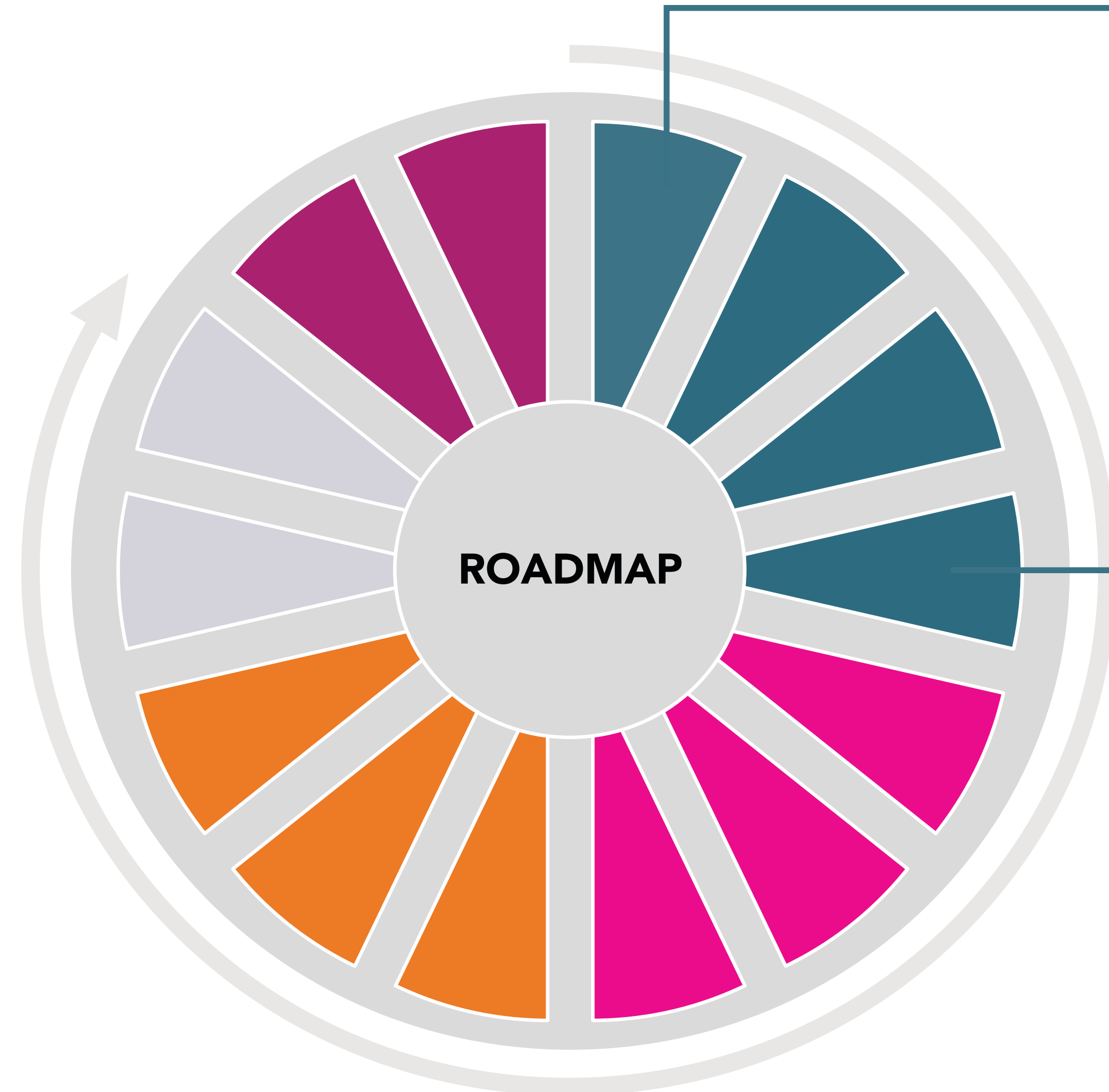
With no defined starting point, prioritize your organizations transformation journey according to your business needs, with a clear understanding of how all the pieces of your operating model fit together.



INSTITUTIONAL ARCHITECTURE

...is the system and structure of the work.

As roles, strategies, and business models shift, those systems and structures will need to be continually assessed and right-sized to ensure they align with and serve the vision of the organization.



INSTITUTIONAL ARCHITECTURE

STRUCTURE

Architectural model and organigram of the organization.

LEADERSHIP

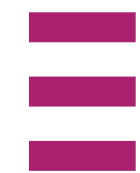
Executive team and leaders within the organization that can influence strategic direction and outcomes.

GOVERNANCE

Oversight mechanisms that provide accountability and strategic direction.

PARTNERSHIP

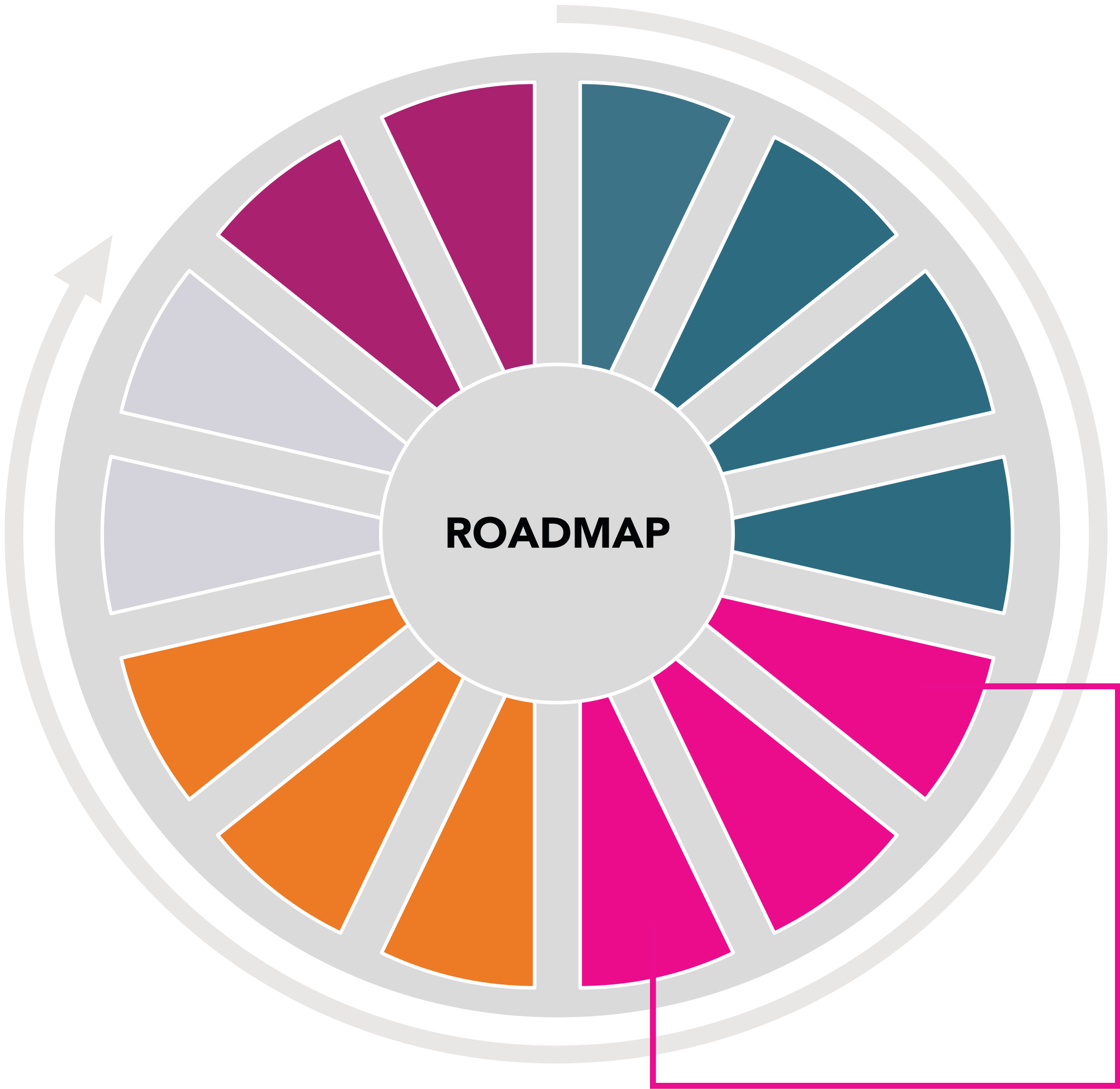
How an organization approaches equitable, strategic partnerships and alliances.



PEOPLE AND CULTURE

...is who does the work and how we work together.

Organizations on a journey towards equitable, locally-led development will need to be continually building a values-focused culture and ensuring their staff have access to fair and just treatment and opportunity.



PEOPLE & CULTURE

- CULTURE**
How to build an environment of trust and shared values.
- TALENT**
Recruitment, retention and professional development of staff.
- COMPENSATION**
Approach to equitable compensation of all staff.

FUNDING AND FINANCIAL SYSTEMS

...is how the work is funded.

Like institutional architecture, funding mixes will need to be continually assessed and right-sized to sustainably support transformation and evolving programming.

INGOs should also review their financial relationships with funders and partners. Are they requesting AND flowing down full and fair cost coverage, and appropriate reporting requirements?

FUNDING & FINANCIAL SYSTEMS

PROCUREMENT

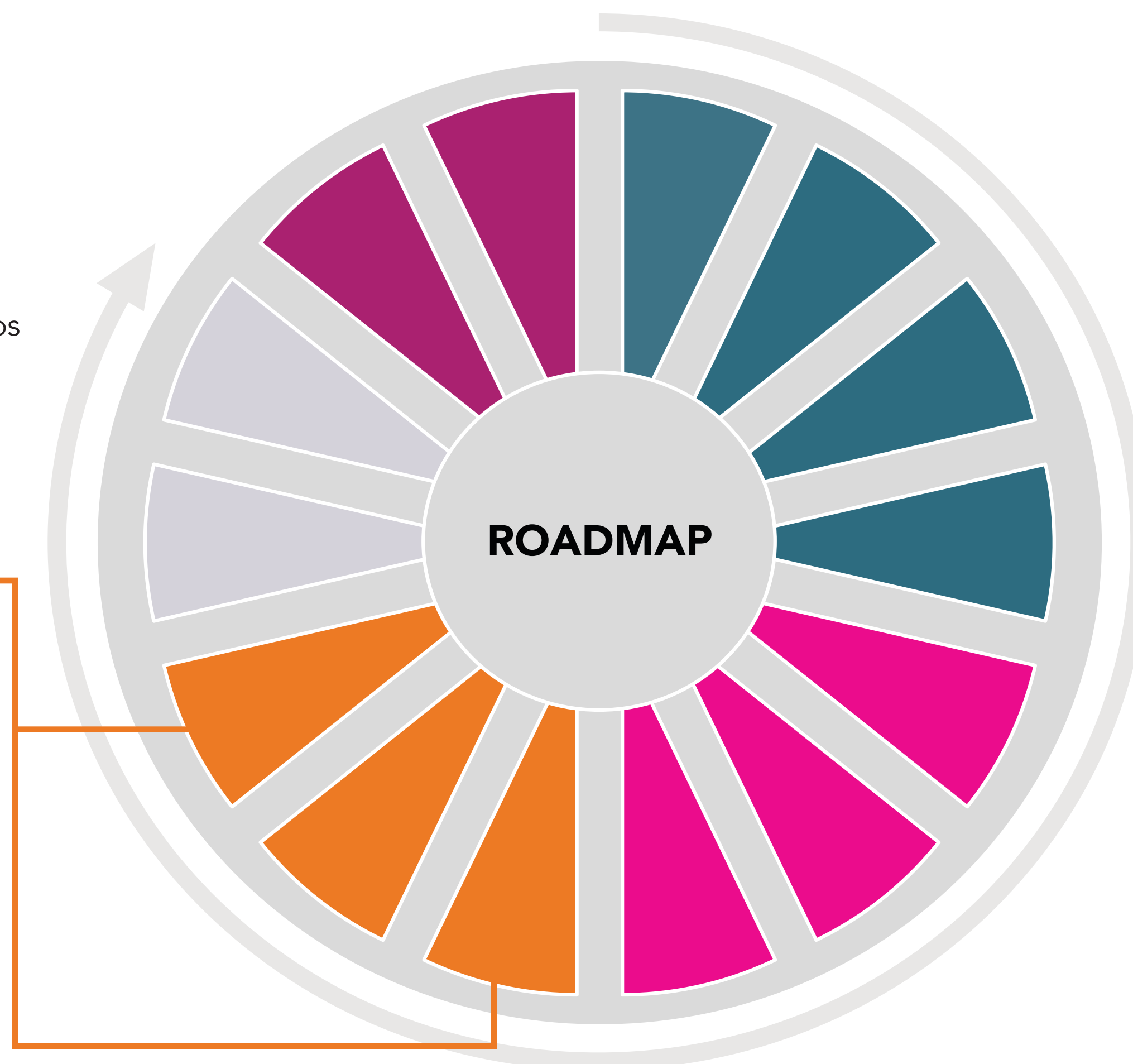
Where, who and how an organization outsources products and services.

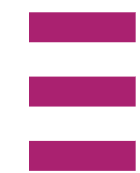
FUNDING

Diversity of funding sources within an organization's portfolio.

FINANCE

How an organization approaches their costing structures and cost recovery with funders and partners.





RISK AND COMPLIANCE

...is accountability for the work that is being done.

Organizations will need to honestly examine their risk tolerances to ensure that their strategic vision and risk appetite align.

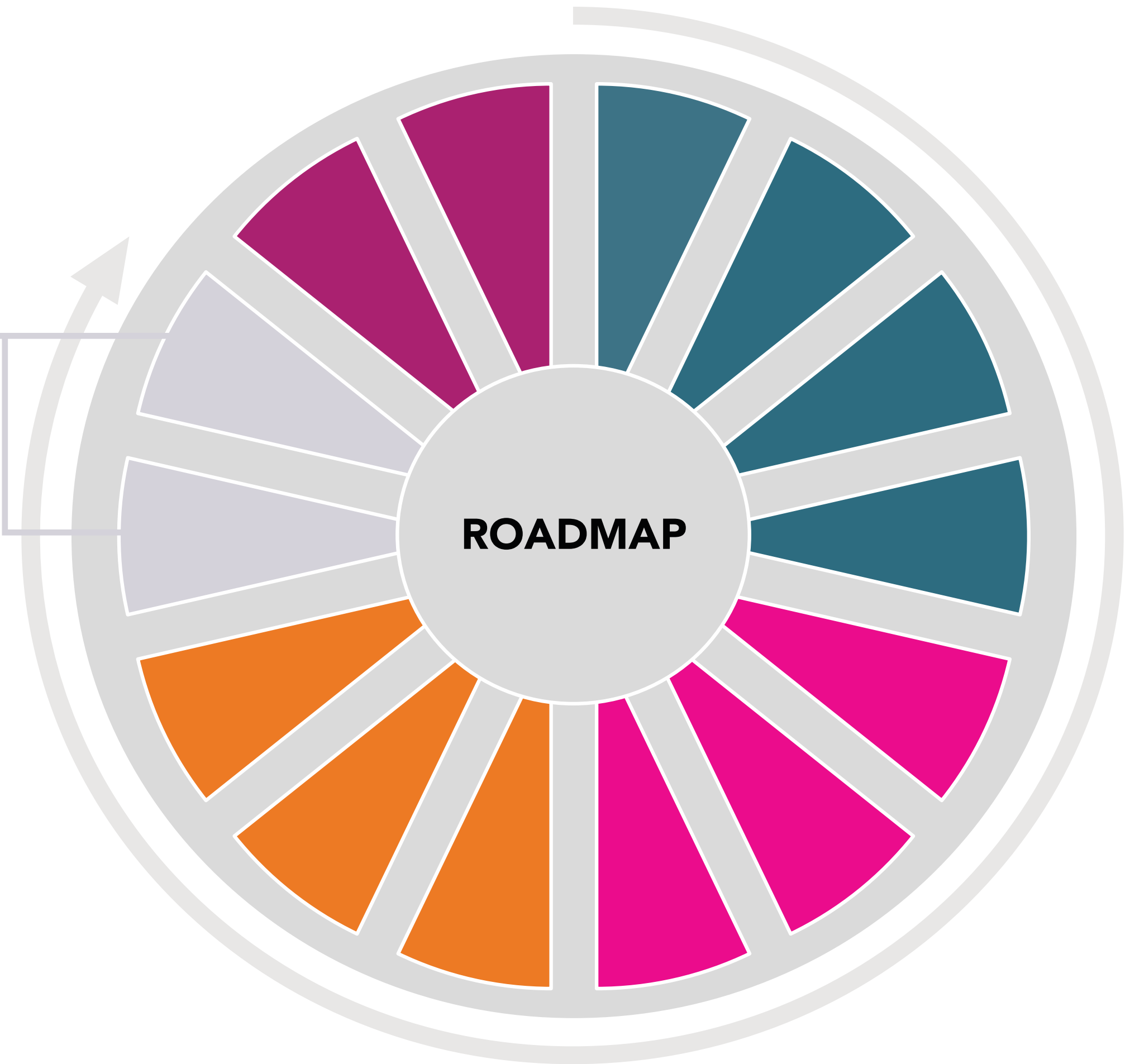
RISK & COMPLIANCE

ACCOUNTABILITY

Processes and capabilities to assess how we are changing to adapt and avoid unintended consequences.

RISK

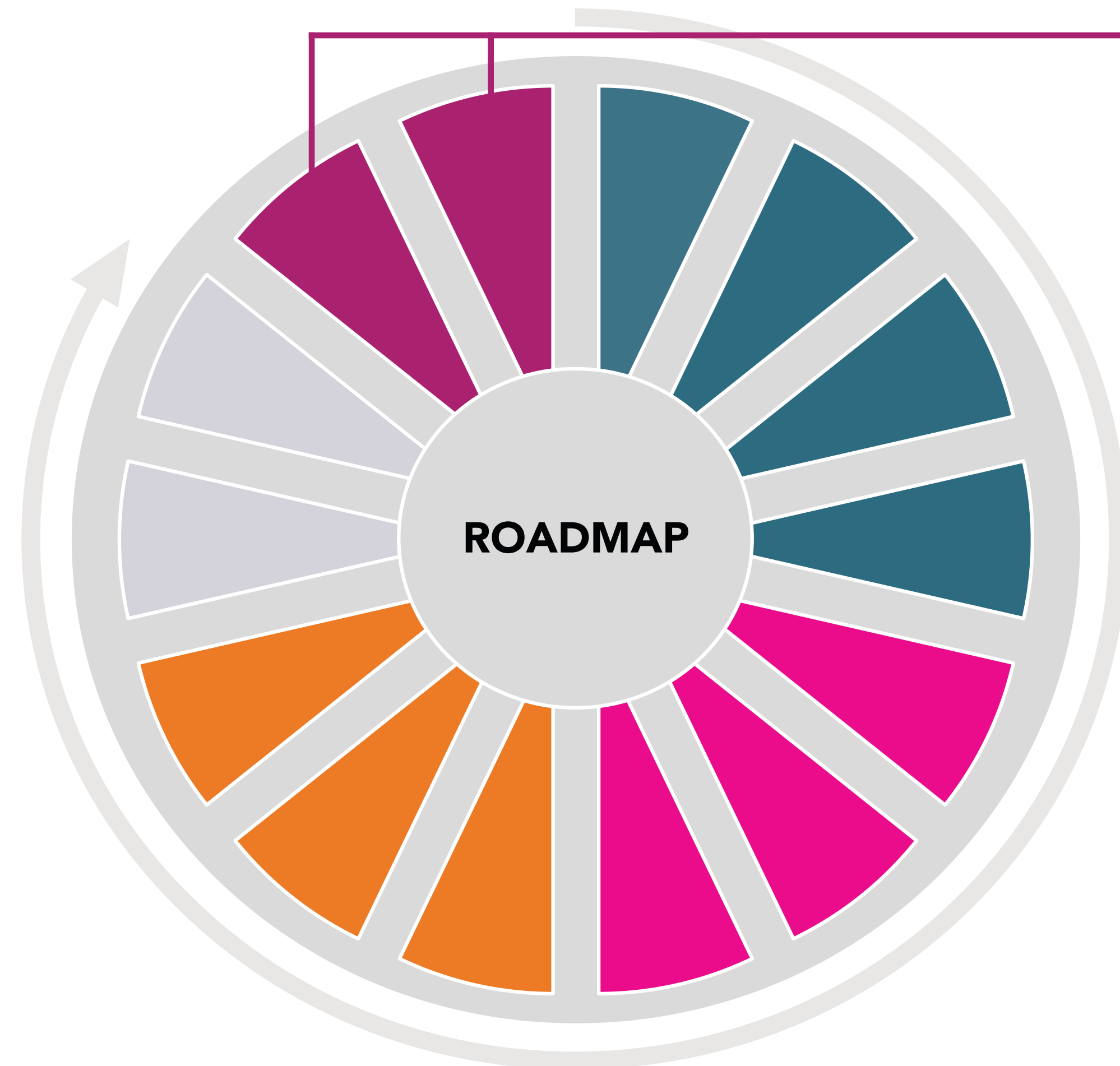
How risk is managed and mitigated across the organization and with partners.



SYSTEMS AND PROGRAMS

...is how the technical work of an organization is undertaken.

An organizations programs and systems are key to building trust and increasing participation and ownership amongst staff and partners.



SYSTEMS & PROGRAMS

PROGRAMS

How programs and projects are equitably designed and implemented.

SYSTEMS

The way in which technology and systems are designed to support LLD outcomes.

THE OPERATIONAL ROADMAP DISCUSSION GUIDE

The Roadmaps working group realized early on that their work was about shaping a process, acknowledging that the process will ultimately look different for each organization. By drafting a series of questions for leaders to consider, the group aimed to guide a common set of discussions, even if each group of actors will inevitably reach different answers.

The Operational Roadmap Discussion Guide will walk individuals, teams, and leaders through the five-step transformation process. There is no right way to use the tool, which is intended to facilitate dialogue and encourage reflection and introspection*.

Here are a few suggestions to get you started on using this tool:

- Focus on one set of questions to support a deep dive into one operational area.
- Use the framework to strengthen decisions and the creation of operational plans for a specific initiative. For example, when updating your partnership approach, what will the impact be on people and culture, finances, and risk? How can you leverage the initiative to increase the equity, resilience, and accountability of the other areas, even marginally?
- Use the operational roadmap framework to connect and integrate existing disparate conversations.
- Use the 5-step transformation process and guiding questions to build a comprehensive roadmap for your organization.

**Note: While the work reflected in the TIME body of knowledge was co-created by SRHR INGO professionals, the insights, lessons learned, and frameworks are broadly applicable across all development organizations.*

**Download the
Operational
Roadmap
Discussion
Guide**

WHAT YOU CAN DO

INDIVIDUALS

Be an internal champion of deliberate, holistic change that is equitable, resilient, and accountable.

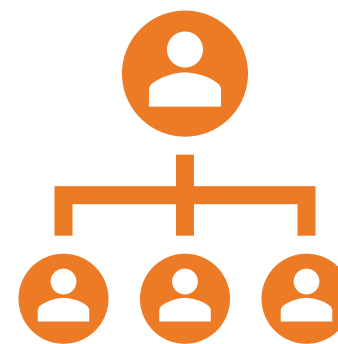
Use the Operational Roadmap Discussion Guide to generate and guide important conversations.



ORGANIZATIONS

Commit to introspection, reflection, and action towards more equitable and locally led ways of working.

During the change processes, meaningfully engage with multiple perspectives within your organization and with partners.



FUNDERS

Reflect on your own policies, terms, and conditions to ensure they are really promoting the needed transformation.

Fund INGO and CSO efforts to transform their operations to be more equitable, resilient, and accountable.



THANK YOU

TIME PARTICIPATING ORGANIZATIONS



Ibis Reproductive Health



EngenderHealth





TIM Transforming INGO Models for Equity

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