



# Taking Collective Intelligence Seriously: The Realities of Participative Strategy Making

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**This is the story of a wholehearted, participative approach to a new 10-year global strategy, designed to embrace the mission, culture, and values of WaterAid. It is participation with creative tensions and a focus on stimulating and sustaining an organisation-wide conversation, its goal – to deliver an ambitious direction of travel for the organisation, shaped and owned by its staff. It is about combining authentic participation alongside directive parameters set by the formal hierarchy – without undermining the legitimacy of either.**

Above all, it is about working with an organisation's actual habits and structures, which can't be short-circuited by external experts carrying out their own process. Culture does, after all, eat strategy for breakfast, especially when that culture is rooted in a deeply held sense of organisational mission.

Based on the experience of Olga and Will, the co-leads of the WaterAid strategy process, these are what made this participative strategy process work:

- Being clear and transparent about the approach, what's going on, when, and who's involved
- Laying out the key areas of contention and tension upfront and the parameters of how they will be resolved or debated. Committing to open and honest conversations about them
- Trusting the wisdom of the crowd in making difficult choices (by consulting widely but wisely)
- Taking your time and fitting with the work demands that already exist for people inside and outside the organisation
- Involving significant numbers of teams and people, including people and perspectives that go against the consensus
- Having the process led by people who are already known widely across the organisation, and using outside expertise sparingly and purposefully.

## **Setting the scene**

In 2020, WaterAid decided to launch a “North Star” strategy process, one that would be directionally defining.

In a federated, global organisation such as WaterAid, a “power with” rather than “power over” approach (to use the language of Joyce Fletcher) to strategy is a given. There is no single centre capable of imposing its will. The operational complexity of its work, with programming in 26 countries throughout Africa, Asia, Latin America, and the Pacific, means local realities defy the imposition of prescriptive global standards. On-the-ground knowledge is an essential source of insight and, over the years, has created a deeply consultative organisational culture, with local teams and stakeholders expecting to be involved in setting priorities. That was behind the intention and practice of allowing the new strategy to grow in part like garden weeds, not hot-house flowers – to borrow from Henry Mintzberg.

The strength of this culture is a willingness of people to engage, which shows up in a persistent 86 per cent response rate to the annual employee engagement survey. But any strength comes with its shadow, and the shadow of a highly engaged employee base in a distributed, federated system is that consultation becomes endless, with indecision creating the risk of delays in actionable implementation.

Within the WaterAid consultative culture, there was a habit of avoiding conflict and letting a number of unresolved issues fester, as they were known to provoke heated exchanges. By avoiding such issues, any new strategy risked looking like the old and, even if the mission stays the same, the strategy needs to adapt to a different world. Worse, without engaging with the critical issues in water and sanitation, WaterAid risked not delivering to its best ability on its reason for being.

## **Designing a strategy process to make a difference**

The approach to the new strategy development recommended by the co-leads, old hands within the WaterAid universe, and approved by the Federation Board, was both philosophy and process. The process spelt out the anticipated schedule and decision points, spread over 16 months; everyone could see when and where decisions were expected to be made and how to get involved. The composition of the formal steering group and multiple working groups was advertised, giving everybody a chance to see who had what responsibilities, and so who they could influence.

By making the formal architecture of the strategy process explicit, the social network of the organisation could both tap into the strategy process and be tapped into. The risk of this was that the strategy process gets hijacked by well-established agendas and networks of influence – a risk that the co-leads stepped into knowingly,

understanding that any strategy process is a political process (and would require them to pull on formal decision-making bodies to own their authority when times got tough).

This transparent tapping into the social network meant that unresolved arguments and debates came into the open and could not be avoided, causing everyone to live through the discomfort and reality of disagreement. Participative transparency is not an easy option, bringing into the open what has often lived in the shadows for a long time, and requires organisations to be (or become) skilled at living with visible difference and knowingly recognising and holding tensions.

This commitment meant not just staying with differences when they arose in the moment or at a specific Board meeting, but deliberately inviting into the formal process those with strongly held perspectives. Better to have people making their arguments within the process rather than fuelling it through the experience of being ignored.

## **What makes conflict creative, not destructive?**

Conflict turns toxic when there is no relational context, no established human and social connection, when, in the words of Martin Buber, there is too much “I-it” (seeing people as things) and not enough “I-thou” (seeing others as fellow beings). In the case of the WaterAid strategy process, the co-leads were known throughout the organisation, had a deep understanding of its customs and practice, were embedded in numerous networks, and had long-standing connections with different parts of the federation. The strategy process and the creative disagreements it provoked could take place within an established relational context; people had some sense of how to engage well with each other (and what to do when they overstepped the mark, as inevitably happened).

There was also the nature of the relationship between the co-leads, which meant that, when one was getting too caught up in the strong emotion of conflict and difference, the other could step in. Facilitating this type of work is emotional labour (as coined by Arlie Hochschild) and needs people to feel safe enough with each other when dealing with charged perspectives. Conflict becomes healthy when there’s enough psychological safety – as made popular by Amy Edmondson. Safety is, however, not a universal and

needs to be negotiated at specific times and in specific contexts, adding to the amount of time that a participative strategy process takes. The co-leads did a lot of heavy lifting around this, and it had to be done repeatedly through the life of the work.

The process also involved a lot of polling and data collection. Thanks to the well-established habits of engagement, priorities from around the world were collated, with people responding to requests for their perspective often extensively and nearly always in a timely fashion. It was striking that the quality and timeliness of responses to requests for information and insight was maintained over the life of the strategy, showing the opposite of strategy fatigue and a persistent belief in the value of participating. It is worth emphasising how much time and effort this took for those tasked with facilitating the process – and how endless it could feel on occasions!

Informed by the collective wisdom around matters such as the aims and priorities of the organisation, people had the opportunity to see the extent to which their perspective chimed with the views of the wider organisation. Conflict can be contained when people become clearer about where they stand compared to colleagues, and facilitators don't become seen as the authors of disagreeable perspectives.

One way that WaterAid went about keeping conflict creative was to set boundaries, establishing some clear limits as to what was or wasn't up for discussion, lessons which any theatre director would tell you about. Much as insight flowed around the organisation with little focus on the formal hierarchy, the setting of boundaries was an example of the focused use of top-down prescription. In this case, the Federation Board ruled out discussion around major changes in the mission or working in the most unstable and conflict-ridden countries of the world.

Not all was sweetness and light and some issues rumbled on through the life of the project, in part because the co-leads didn't get the process quite right. For example, there was a difficult choice to be made around whether or not to withdraw from certain of the 26 countries currently operated in to focus resources for maximum impact. This ongoing source of friction was managed, in the end, through using others in the organisation who were seen as honest brokers and wise heads, who could draw the sting from the issue. In the end a consensus emerged and the decision was made to withdraw from four countries, with each of these countries given full autonomy to decide and manage the withdrawal time frame and process.

Once again, this can sound easy when written like this, but these were decisions fraught with strong feeling up and down the hierarchy and required persistent and long engagement with the various decision-making bodies at all levels of the WaterAid hierarchy. These were the moments when top-down decisions met bottom-up consultations, within the messy complication of a federal governance system.

## **The role of external parties**

WaterAid always works with many stakeholders, and the strategy process adopted a similarly systemic perspective. Over 50 third parties, from donors and governments to peers and experts around the world, made a contribution, ensuring that the strategy reflected the insights of the external context. A strategy needs to maintain both organisational identity and organisational connection with the world.

External strategy experts were used sparingly, so as not to undermine the organisational ownership of both process and output; internal insight and buy-in were more important than analytical perfection. Classical strategic perspectives came from a couple of Trustees with backgrounds in corporate strategy and a few experts, while Chris Nichols of GameShift was invited in at specific points when the co-leads felt stuck. One area of "stuck-ness" was around how to deal with the interdependencies between work streams and work stream members' frustration at how to live with and manage these overlaps.

The main focus, however, was on WaterAid conducting its strategic conversation in its own way, reflecting its organisational culture and enduring sense of mission.

## **Communicate, communicate, communicate**

A strategic conversation that looks to engage with as much of the organisation as possible has to fit with people who have other responsibilities and priorities in their lives. This means providing many opportunities and ways for engaging, so people can choose to join in in ways that fit their schedule.

Workshops, where work in progress was shared and debate invited, were repeated across time zones and run in French and English, the dominant languages of the WaterAid world. The co-leads learned to deliver workshops and seminars repeatedly, sometimes to groups of four and sometimes to a crowd of 400 – an approach intended to fit with priorities of employees, not the schedule of the strategy.

COVID also proved a blessing for participation, with a move to fully online events giving an equality of experience different from when it was expected that most people would travel to London or another capital in the Global North in person. This made sure that people had exactly the same experience of participation wherever they were and whatever function or role they played. This broke the model of London or northern capitals being the epicentre that the organisation has to come to for its collective identity.

This endless – as it sometimes seemed to the co-leads – round of online events over the life of the process resulted in there being no surprises by the time the strategy was formally announced. Throughout, people could see how decisions had been reached, how they had been able to shape things, and when contributions had been incorporated or let go. Some still disagreed and shared their disappointment, with strong divergent

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Around 20 senior leaders from across the various Federations and the Executive Team took turns to speak at and facilitate this rolling wave of communication events, showing that the strategy was not the vision of any one member of the Executive or one branch of the Federation. Having a diversity of voices spoke to this as a collective endeavour and gave a variety of personal tones to go with the strategy. Listening to just one voice always becomes monotonous. It was also a visible sign of how consensus was emerging within the leadership teams and across the wider Federation.

This constant communication was hard work; the co-leads worked long screen days of back-to-back events with people around the world. They remain convinced of the old cliché that it is impossible to over-communicate when it comes to participative strategy-making.

## **Time**

Participative strategy takes time. You cannot short-circuit how long it takes for people to digest and respond to proposals and decisions. This is strategy at the speed of the human heart, not the intellect.

For those at the heart of the strategy process, it feels desperately inefficient, repeating workshops and arguments time after time, having the same conversation with the same people, whose attention has lapsed in the face of other demands. But this is not about the efficient use of the strategy facilitators, this is about the effective use of time across the whole organisation, so that when the strategy was formally launched it was widely understood, and many had begun taking steps to bring it to life.

Two groups had their time imposed on – the Federation Board and the Executive Team. They had to come together more often and for longer than normal, engaging with what was emerging from the wider consultation. As a result, both these groups became more cohesive as working bodies as a consequence of the extra work they did, and the contentions they faced into.

## Conclusions

WaterAid's approach to participative strategy grew from its culture. Power and responsibility were distributed because of its federal constitution, while an expectation of being consulted had a long history. Within this context, the features of the strategy process that stand out are:

### **1. Being clear and transparent about the approach, what's going on, when, and who's involved.**

A traditional responsibility/assignment (RACI) matrix is a useful tool in making it clear to everyone where responsibility lies. Alongside this, a visible roadmap highlights when and where decisions are going to be made, and where the touch points are with key decision makers who will be making the decisive calls.

### **2. Laying out the key areas of contention and tension upfront and the parameters of how they will be resolved or debated.**

Committing to open and honest conversations about them. Every organisation has festering wounds and people project their own version of the world onto the strategy. These need signposting upfront, along with other fault lines, dilemmas, and tensions. People need to see how they will be resolved and addressed, even if the resolution is unknown ahead of time.

### **3. Trusting the wisdom of the crowd in making difficult choices (by consulting widely but wisely).**

Decide on issues of the utmost importance where teams are given the options and can make choices. Be specific in the questions you ask and signpost requests ahead of time, and don't overwhelm people with paperwork!

### **4. Taking your time and fitting with the work demands that already exist for people inside and outside the organisation.**

Participation in strategy has to fit around the demands of people's ongoing work, not the other way around. Maximising the efficient use of the strategy team is secondary to the effective engagement of the wider organisation and stakeholders in the process.

### **5. Involving significant numbers of teams and people, including people and perspectives that go against the consensus.**

Organisations are rarely limited by the talent that exists within them; what they are limited by is the ignoring of people's distinctive skills and knowledge. Involving many people taps into this wealth of ability, which will include people who see the world differently and feel strongly about this difference.

**6. Having the process led by people who are already known widely across the organisation, and using outside expertise sparingly and purposefully.**

Political nous, gravitas, understanding of how to open up and create space and how and when to narrow down and drive the process come from a deeply known understanding of an organisation's culture. Participation is an organic and political process which is unique to every organisation.