

STRATEGY 2021

In 2016 World Relief began the strategy framework, +ULTRA. With a deep desire to continue its journey towards becoming a world class organization, World Relief began a specific and strategic process by:

- reviewing both the achievements and challenges of the previous five years.
- discussing underlying issues holding us back from breaking through to an even more fulfilling future.
- celebrating the strong sense of shared mission among all of our staff and volunteers even as we acknowledged that we had grown accustomed to working in ways that did not always deliver on our shared values.
- acknowledging our interdisciplinary processes and decision-making structures needed to be clearer and better.

Now, 5 years later World Relief is continuing it's in work in +ULTRA's five key themes, in +ULTRA 1.5. Through working groups, insight from staff on all levels and led by a continued desire to be the gold standard for humanitarian organizations, we are refreshing the five themes and doing deep work around embracing our **multicultural identity, commitment to our christian calling** and **innovation**. We are calling

FIVE THEME AREAS

1. RE-Balance Economic model

When + Ultra began the organization struggled to understand its base economic model, and funding mix. We were suffering from acute 'overhead starvation', with international programs not optimized and suffering from rapid decline in public funding. Our U.S. work was suffering, unstable and unclear. The center could not support or sustain either. Lack of understanding at the executive level led to lack of transparency and trust across the organization. We did not know that we were practically insolvent and had depleted our cash reserves.

As a result of + Ultra we have arrived at a slightly dynamic holding pattern—whereas we understand our finances, can build more enduring decision-making models, and are building more transparency and understanding at both the enterprise and field level. We are proud of the progress consummate with where we were in 2015, and the much improved, yet still insufficient, cash position that we are in, but still desire to go further. There is still a lack of clarity as to where the money is going and what it is doing—both at the enterprise and field level. We desire to engage an economic model that moves us from organizational viability to vision. We desire to simplify and clarify our economic model to increase transparency and understanding for the future. We desire to increase our 'where most needed' funding allowing for greater flexibility in the VUCA world in which we live. As we move forward, we would do well to look towards what our early warning systems capabilities are so that we do not find ourselves in a similar position to 2015 again, and without warning.

2. Investing in our mission and brand salience.

In 2015 the organization's marketing and fundraising initiatives were disjointed, under performing and not trusted or understood by the rest of the organization.

There were a variety of separate fundraising channels, lack of investment in them, or non-productive investment. There was little or no desire from the center or from US ministries to work together. We had no sales funnels, no mid-level or foundation program and relied on the same donors with little acquisition growth and high attrition. The organization had tried and failed to launch two monthly giving products in quick succession (Stand Together and Empower and Hero) The brand was confusing, constantly changing and in some regards not aligned with the organization or its priorities. Our public voice in advocacy and public Christian witness was marginalized and not fully supported for fear of donor backlash. Our donor base faced significant atrophy.

+ Ultra helped us to align our fundraising efforts into a cohesive enterprise team as well as began a journey with deeper service to and integration of US ministries fundraising. We clarified our global brand, built sustaining platforms and increased our public voice and Christian witness. Private revenue grew sizably compared to our baseline position, we launched what we believe is our enduring continuity giving product. The hard-earned progress we have steadily made in U.S. fundraising is something to be proud of! As we look to the future we desire to go further our investment in brand/revenue and voice is still not at levels consummate with our competitors, and does not take into account all areas where our brand is relevant (public funding arena for instance). Our brand has trended local and, in some ways, has left behind our international work. We desire rapidly increasing WMN revenue, and monthly donors. Our voice in advocacy and public Christian witness is more valued across the organization. This is true in our brand and fundraising as a driver of donor acquisition but is also growing in prominence in the eyes of our program staff as a key activity towards integral mission. However, it is still under-invested in consummate with both advocacy and public witness priorities, including core activities in grassroots, grass grass tops and influencer strategies all of which lead to policy change and donor acquisition. As we move forward attention needs to be given to the overall “flywheel” of the organization as well as a careful analysis of the current state of the church in the United States – which is both an object of our mission as well as a key fundraising market.

3. Improvement of financial and human capital management

Over the years of + Ultra we have slowly improved our financial management systems to create better clarity and decision-making tools compared to our 2015 starting point but have lacked any significant progress on our human capital strategy. +ultra revealed that we essential had no cash and no warning systems to avoid crisis. While still operating in four years of protracted financial crisis brought on by the reduction in US programs we still managed to improve financial systems.

We desire to build out and simplify our financial management infrastructure for the 21st century so that we can create clarity around our costs, investments, role of the center etc. We need to develop efficiencies across divisions in terms of financial management and outline our early warning systems. The development of a human capital strategy was consistently derailed by lack of capacity, investment and crisis (both internal and external). Our most notable exception to this was the Gallop 12 survey led from US which resulted in the organizations first ever managers meeting. This is an area that the Executive Committee is excited to engage with as we seek to continue World Relief’s journey to be a world class organization, with excellent management of our most valuable assets.

We have attempted to make progress across our wide array of locations and cultures what the organizations Christian identity is. This work is good, yet still lacking. + Ultra did not address issues related to multiculturalism and so as we move forward we also desire to learn what it means to embrace and accelerate the multicultural aspect of our organization, yet realize the immense work to be done. including defining a cohesive philosophy on Human Capital before implementation of its various elements.

4. Integral Mission

As + Ultra launched Integral Mission was becoming widely adopted as the way we work and live in our global programs—this was most prominent in our Developing Countries Unit, but over the past 5 years has grown in our Humanitarian and Disaster Response Unit. This has become most industrialized in our Church Empowerment Zone model, but is also present in our humanitarian and DR work. The international team has also shown that all most all of our program areas can be adapted to have integral mission DNA at their core and they have shown that public funds can be utilized to advance our integral mission ministry.

Integral mission in the US however has never been fully adopted or realized—it could be argued it has never been fully rolled out and surely has not been contextualized properly for the US context. The debate in the American church over word/deed or gospel proclamation/social justice is still very strong, and while there is deep learning that needs to take place from our colleagues in the global south, the context is such that a refresh is needed and that our Advocacy and Public Witness arena may be the best anchor for pursuing this in the US

Overall, while much progress has been made the collective view of the ExCo is that this priority has stagnated. Our funding (and our funding mix) has not allowed us to continue to develop, enhance and scale our most noteworthy IM work, CEZ, and our lack of a coherent human capital strategy has caused a base level of understanding in the US workforce to diminish and be overtaken by controversy.

Our desire is that this continues to be a distinctive of World Relief—everywhere. We desire to promote an organizational identity based on our being rather than doing and which is deeply related to our relationship with Christ. In short, we want to grow in our desire of what Jesus desired, to do the things he did, we want the outcomes He wanted.

5. Quality and Impact of programs stay relevant

When we began our +Ultra journey the quality and impact of our programs was more variable than we knew or desired. This was true of both the US and international, but especially of the US, where our scores on public grants were diminishing. This was due to a number of interrelated factors: lack of data systems, lack of funding for non-federal programs, little universal program impact knowledge, and leadership.

Over the course of the past several years global standards in program impact have become more standardized (Core Humanitarian Standards). The international team has continued to improve their program audits and compliance work. The work of global tool kits, inclusion and ensuring program are gender transformative have grown this area. The international unit was also able

to complete some compelling studies on the effectiveness of various program integrations, but in some ways lags behind in our ability to measure quality and impact everywhere, but more specifically, in our HDR unit.

Our work in the U.S. showed marked improvement in federally funded programs (most notably R&P), with increases in our public scoring. However, the lack of service line funding, and proper data tracking systems has caused very little progress to be made in other programs. However there is a deeper appetite for this at present. At the same time the core cultural misalignment within our US ministries as to the role of the offices visa vie each other and the organization as a whole is large and has hindered some efforts as it is not understood why impact in one office effects the others. This is beginning to change, but marks a large and daunting challenge to moving forward. Over the course of + ultra we did launch a data journey, but it stalled quickly. We desire to develop a more integrated system by which to measure the quality and impact of our systems across World Relief's global and local footprint. This is needed to satisfy our own ambitions and our funders—both public and private.