

Leadership Team Memo to the Board on Organizational Restructuring (FINAL)

8 JUN 2022

I. INTRODUCTION

AFSC's long journey toward a re-envisioned structure that best captures the hopes, goals, and vision of all participants in this process has been a long one, and leadership is grateful for the immense effort and care that have gone into the multiple proposals and ideas brought forward. While this process has required significant time and labor from all of us, we are optimistic that together we will achieve a structure that ensures our success in the implementation of the new Strategic Plan.

We are particularly grateful to the many working groups that convened throughout winter and spring 2022, and their tireless efforts to ensure that the proposals and recommendations contained here and below reflect the best ideas from the full spectrum of staff perspectives. For more information on the entire staff restructuring process and the composition of the working groups, refer to the [General Secretaries April 2022 Report](#) to governance. Additionally, all groups have been doing an exceptional job ensuring transparency by posting their notes, recordings and latest versions of their documents on a [designated StarCafé page](#), with access provided to all staff and governance. We are grateful for their efforts. We have also updated the site with the recordings, notes and survey results from the feedback received from across the organization during the last two weeks of May.

On Friday, May 6, the Leadership Team met in Philadelphia to discuss next steps in this process, and to review the most recent ideas brought forward by working groups. After much discernment and thoughtful consideration, we proposed an approach to restructuring that allows for movement forward in areas of collective agreement and offers time for deeper collaborative work on areas requiring further alignment. We seek to honor the time, effort, and commitment put forth by staff in this process. Therefore, at this time, we are moving forward on items that seem sufficiently advanced—such as the Global Cohesion Division and the IP structure.

On Wednesday, June 1st, the General Secretary met with the USWG to begin exploring a path forward for continued work on the US Proposal. Facilitated by Rebecca Subar, the group looked at holding regular consultations between the USWG, General Secretary, and additional members of the Leadership Team. The central theme of the meeting was to come to agreement on next steps for discussion, so the opportunity to substantively discuss specific elements of the US restructure will occur in upcoming conversations.

This memo includes the following:

- ***A proposal for the creation of a new Global Cohesion Division***, to be considered by the Board of Directors in June, as well as the framework for its leadership. We are proposing the creation of an Associate General Secretary role to head the Division for Global Cohesion. *This will be the only item requiring Board approval.* This proposal was developed by the Working Group on Global Collaboration – a diverse group of twenty-one staff from across the organization who have met weekly since November 2021.
- **A summary of changes in the International Programs Division**, specifically the addition of two thematic leads on Peacebuilding and Migration and needed clarification in relationships between international advocacy staff and the policy office in Washington, D.C.

- **An update on the US co-design structure** featuring key elements on which agreement between leadership and the US Co-Design Working Group (USWG) is emerging. These elements clarify the role of thematic work, retain regional management, and establish a new staff committee – the US Programs Council. In the next weeks the leadership team and the USWG will move into a new phase of work, in which they will engage in deeper, direct engagement on other areas of the proposal.

Although it is not part of the staff proposal, these proposed changes would not be complete without recommended **shifts in governance**. The ideas being proposed by the Board Working Group on Program Decision Making (BWGPDM) are in a related document and one that is being seasoned by the Corporation and governance between now and early June. Thus far, the LT supports the general direction of the proposal as we see it aligning with staff structure. The proposed creation of one US EC, and retaining IPEC, both of which would include thematic and regional sub-committees, is a step that will allow staff and governance structures to align in support of the strategic plan goals.

II. PRINCIPLES

Among the principles guiding this restructuring process are:

- We will remain focused on ensuring deep community engagement and living into our mission as a truly global organization. We aim not to devalue what has been built, but to strengthen our organization, its programs, and relationships with community.
- The general secretary and leadership team will be committed to direct consultation, as well to direct and transparent communication regarding process and decisions that affect staff and communities.
- We will retain and act on our commitment to centering principles of equity, inclusion, and mutual respect.
- There will be zero tolerance for retaliation as staff engage in internal dialogues about this process and bring forward their ideas and concerns.
- The new structure will not result in staff layoffs nor will it weaken existing programs.
- We are committed to erasing the notion of “two AFSCs” – US and International Programs. We are one organization that honors the rich diversity of its people and its communities.
- We are committed to a new structure that fosters organization wide collaboration and collective impact. As we live into the Strategic Plan, together we will do more and better to work for lasting peace and against the oppression and violence that plagues our world and harms our communities.
- We are committed to continued feedback and putting our learnings into action as we implement the new structure, understanding that while we have put forth our best collective thinking, we may need to adjust and respond to unforeseen changes.

We are committed to applying an anti-oppression lens to our work. The Harmonization Team, a group tasked with reviewing proposals for clarity and alignment with our values, met with members of the anti-oppression and anti-racism toolkit working group, and will support their development of an evaluation tool to accompany the restructuring process.

PROPOSED AFSC STAFF STRUCTURE: THE BIG PICTURE



III. A NEW GLOBAL COHESION DIVISION¹

The Global Cohesion Division is charged with making real AFSC's intent to operate as "one organization" for collective impact, providing the support and resources to ensure common analysis, choreographed strategies, shared learning, and various forms of collaboration across geographic and thematic divides. This division will provide the energies and investments needed for AFSC to increase and coalesce its intersectional work on a global level and will support deeper methodological engagement throughout the organization. At the same time, it will work to support and strengthen local programs and capacities.

- This division will take care to balance the tensions between a shared global strategy/view for the organization and our commitment to local autonomy and context, ensuring approaches to collective impact that are directly shaped by local programs. It will also balance the need for effective long-term strategies with the need to facilitate rapid and flexible responses to shifting events.
- The GC Division we envision is about increasing our organization-wide planning and learning, lifting up and supporting our program work for amplified impact and serving as a resource to programs globally. Geographically, roles within this division could be dispersed across the globe.
- The Division will focus on facilitating and supporting the effective implementation of shared program plans and/or strategies throughout the organization rather than implementing separate approaches to work (exceptions being staff charged with implementing particular aspects of AFSC strategies such as the policy and advocacy department, and Youth work).

¹ LT will reevaluate naming of new GC Division to avoid reinforcing organizational "division" while building "cohesion"

- The goal of the new division is to shift how we approach collective work that transcends individual program impact, but this approach is not “new” -- we are building on past organizational efforts in this regard, learning from what worked and what did not within previous initiatives such as the Peacebuilding Unit, various Task Forces, Integration and Impact, Strategic Initiatives, and other such efforts to achieve collective impact.
- The division will work to ensure open lines of communication across locations and provide avenues for programs to easily connect with colleagues through a single point of outreach (playing a connector role where program staff may not know where to start in a complex organizational landscape).

Building for Success

To succeed the division must be staffed with priority given to filling the AGS position and hiring at least one support staff person. We will aim to have this role in place within the first quarter of FY23.

The division also must be resourced with a budget built out to meet its goals.

There will need to be a period of intentionally scaling up work to build support and excitement and to develop relationships while not overwhelming staff. While this document broadly outlines key elements of structures that should be included within the new division, the process of changing exiting unit charges and structures, adding staff, and building organizational understanding and buy-in for new hubs will take time.

As outlined below, the AGS will also need to work with key Office of Public Policy and Advocacy (OPPA), Department of Planning, Monitoring, Evaluation and Learning (PMEL), Office of Diversity Equity and Inclusion (DEI), Development, Communications, and program staff as well as the to be hired/identified thematic leads to build the new hub structures and Terms of Reference (TORs).

To succeed, the building of this division should be a participatory and iterative process that proceeds with an understanding that hubs and the new unit will need to continue to evolve based on experience. To this end, written into planning should be regular internal assessments that use appreciate inquiry or similar processes to identify successes and challenges faced by the new division, and particularly hubs, for the purpose of noting what is succeeding and what might need to change to build towards a stronger division.

This Division convenes program staff from across AFSC, therefore its success depends on us maintaining strong, adequately resourced, and staffed local programs in the U.S. and IP.

Proposed Division Structure

1. **Hubs – Just Peace, Just Migration, Just Economies, and Equity Commitments**
2. **Department of Policy Strategy and Advocacy (Presently called OPPA)**
3. **Department of Strategy, Learning and Impact (Presently called PMEL)**
4. **Coordinating functions, positions, and structures for cross-organizational work [Climate Change, Youth Work, Research, and Learning Communities]**
5. **Leadership: Associate General Secretary and other new positions**

Annex B lists the Working Group’s Areas of Agreement and Challenges

1. Hubs

The new division will be the home of four new hubs that pull together staff from across the organization. Three of the hubs will be structured around the organizational thematic priorities: Just Peace, Just Migration, and Just Economies. The fourth hub will bring together AFSC’s DEI work, which will hold our intersectional commitments to anti-racism/anti-oppression, feminism and gender justice; and the organization’s youth

work. These hubs should be built through a participatory process led by collaborative teams of key stakeholders including program staff from across the organization, rooted in their needs and experience. At least six months should be allowed for the hub building process.

Hubs are formal organizational structures. While they are not presently envisioned as staffed structures, participation in the hubs will be a responsibility identified in the job descriptions of key staff.

To succeed, hubs must also be funded so that in person meetings, convenings, planning sessions, and other work can occur. The AGS will manage the hub budgets.

The hubs will be mandated to lead global thinking and coordination in the areas within their mandate. That said, hubs are not envisioned as direct implementation bodies and are not bodies that will unilaterally dictate approaches to programs which must respond to diverse local context needs. Rather, the hubs will build a cohesive organizational vision and approach informed by program work, while promoting synergy among programs across the organization.

It is important that these hubs not be perceived as “Philadelphia”, but be seen as global AFSC structures that are in place to give equal voice and support to all parts of the organization and to build connections/provide support across divisions. Attention to translation, timing, and other aspects of inclusion will be attended to at all levels of design and implementation.

The structure and functioning of the hubs should be regularly assessed for the purpose of making changes and shifts to improve their work based on learning and experience.

i. Global Thematic Hubs

The AGS-GC will work collaboratively with key OPPA, PMEL, DEI, Development, Communications, and program staff as well as the Youth Director and the US and IP thematic leads (once hired) to structure and develop terms of reference for each of the three thematic hubs.

This process will identify who will be a part of the hubs once they are formed, but it is anticipated that the U.S. and IP thematic leads will co-convene the hubs² and key staff from PMEL, DEI, and OPPA will also participate in the hubs. The US and IP thematic leads will also coordinate closely with program staff in their respective spheres to build a process for ensuring that program staff globally are engaged by and can participate in the hubs.

Once structured the thematic hubs will meet regularly and will be led by the AGS-GC with support from division staff and hub members. Some of the functions they might serve include:

- Maintaining clear and regular lines of communication about thematic approaches across organizational divisions.
- Ensuring a broad understanding of local work occurring across the full range of AFSC program locations and identifying how that work and its impact can be lifted up at higher levels.
- Coordinating with program staff to analyze, develop, and refine global thematic approaches and theories of change.
- Identifying, supporting, and resourcing shared program approaches across the organization that help move towards long term change.

² While there will not initially be a Just Economies thematic lead in IP, the EJ hub will be structured to ensure IP engagement and full participation.

- Organizing and facilitating regular conferences, issue-based convenings, and other events (both internal and external) to enhance learning and shared impact.
- Ensuring sustained high-level communication between key program, policy, and learning staff.
- Supporting and encouraging staff and program exchanges/learning, site visits, delegations, etc. to build understanding, cross program fertilization, and shared identity.
- Identifying and supporting ad hoc/informal methodological, approach, or topical nodes/networks/working groups.
- Identifying external opportunities and pulling in outside expertise and thinking to AFSC processes
- Serving as a rapid response forum for thematic issues when program staff need support, regarding situations/locations where AFSC may not have a program presence, or as needs arise

ii. Equity Commitments Hub

A fourth hub will be set up with responsibility for additional organizational learning on the Strategic Plan’s equity commitments. This Hub would be co-convened by the Senior Director of Diversity, Equity, and Inclusion and the Director of Planning and Evaluation. The coordination and knowledge management aspects of such a Hub would also be co-managed across the two departments, and the hub’s activities will be determined by these two departments in consultation with others.

One rationale for such a proposal is that both offices are deeply concerned that we will stretch staff too thin, if we add the coordination and management responsibilities of an additional Hub on top of expectations of program participation in Thematic Hubs.

The Racial and Gender Justice commitments will continue to exist and be staffed within DEI. The Office of DEI may expand its capacity to support this work across the organization; but only after careful internal consideration of how existing obligations can be met, new staff can be integrated, and work can move forward strategically. It is assumed that any new positions within the Office of DEI and the Youth Director would be key leaders within this hub.

Sample activities include:

- Supporting synergy between DEI’s work on the intersectional commitments and our HR practice
- Cutting edge approaches to incorporation of DEI into Monitoring, Evaluation and Learning (aka the “data justice” conversation among PMEL practitioners)
- Development of an organization-wide youth safeguarding policy
- Creation and seasoning of a screening tool to capture how the commitments have been embedded into program theories of change and our implementation practice, including constituent-driven assessments of progress.

All staff would be invited to participate in Hub activities, as the commitments are not limited to programs, but speak to organization-wide priorities and practices.

2. Department of Policy Strategy and Advocacy (PSA)

The department currently called the Office for Public Policy and Advocacy (OPPA) will be placed in the new division, with its name slightly revised to the Department of Policy Strategy and Advocacy, and functions largely remaining the same.

This department is charged with supporting and ensuring coherence in all AFSC work that seeks to influence government and multilateral organizations’ positions and policies. As a U.S. based organization there is a

special emphasis on addressing US national and foreign affairs, but the policy department's mandate and responsibility for coordination are not limited to the U.S.

IP regional advocacy efforts presently delegated to Policy and Advocacy Coordinators (known as PEACS) will continue to report into their respective regions with an accountability dotted-line with the policy department (see *Annex C for a clarification of the dotted-line relationship*). This dotted line is in place to ensure coordinated approaches to strategy development and messaging, to harmonize AFSC's engagement with similar decisionmakers, partners, and coalitions from multiple parts of the organization, and to ensure close and consistent consultation/collaboration on all aspects of global policy engagement. The relationship between the staff working on policy in the US and IP and the department is two-way. The department provides coordination and expertise that complements and builds on what exists in other locations, while PEACs and US staff provide expertise, local connections, and capacity to expand the organization's coordinated policy reach and impact. Communication and formalized partnership/relationships are key for ensuring a cohesive organizational voice and effective approach to systemic policy change.

While direct policy work will occur in different spaces globally where very different approaches are required and some work will always remain local, there also is a need to ensure that AFSC speaks with a consistent voice, as well as a need for choreographed approaches to policy change work across various contexts for maximum strategic impact. While this department doesn't decide on local messaging, it plays an essential role in coordinating AFSC's voice across locations and ensuring that AFSC programs do not contradict one another with conflicting messaging or approaches. This collaboration should be close and two-way, with the organization's overall policy coordinators within this department maintaining strong links for the implementation of a system-change approach to the work in different locations.

The Department will convene an organization-wide, cross-thematic coordinating table for a broader spectrum of staff who are engaged in policy change strategies, working in concert with the thematic hubs to ensure that our engagement strategies and messaging with governmental decision-making bodies are choreographed. This table could include staff from the policy department, QUNO, and key program staff with significant policy change objectives within their programs, and other relevant staff engaged heavily in influencing governmental actors.

3. Department of Strategy, Learning and Impact (SLI)

A restructured organizational and program support department will sit within this new division.

The department's role will be to provide functional leadership in the areas of organizational design/planning, monitoring, learning, and evaluation. This also includes the creation of tools, templates, and approaches that support shared strategies and common learning frameworks – so that AFSC programs have access to a diverse set of tools and know what tools are most appropriate for different purposes.

The purpose of the department is to amplify program impact in new ways (e.g., developing organization wide Strategic Planning, monitoring and learning strategies, programmatic theories of change and theories of action as a new practice/approach). Given the essential role of this work, hiring of a new staff person in this area will be considered a priority.

Key shifts with relevant structural implications include:

- A revitalized and vibrant monitoring, evaluation, and learning function. The vision for this function was drafted in 2020 and captured in *Organizational Development Goal 3: Amplify Program Impact and Learning*. Technical leadership of this functional area will shift to the revitalized department.

- Staff of this department will bring their existing skill set and experience in Planning, Monitoring, Evaluation and Learning (PMEL) to their contributions to the Global Thematic Hubs. This change builds upon the strong global/US/IP collaboration and in effect democratizes the scope of the collaboration by expanding it beyond central office staff.
- It is essential that we clarify roles and responsibilities between a Division of Global Cohesion and US and IP program implementation divisions. This includes recognition of AFSC's existing practice as well as external nonprofit best practice. A sampling of the issues that need to be clarified and codified under this point, include: 1) when in a program or grant life cycle the department is best-placed to enhance program learning and impact (e.g., design and evaluation stages, while monitoring should happen closest to the ground); 2) why the department will expend a greater level of its time and effort at the portfolio level in accordance with the three themes (and the implications for when and how program leadership signals when there is a need for additional capacity or coaching for individual programs); or 3) the distinct but complementary roles and responsibilities of PMEL staff in either US or IP.
- As *Strategic Plan 2020-2030* is a whole-of-organization plan, the new department will support organization wide monitoring, learning, and evaluation of plan implementation. At a high level, the intent is for learning and monitoring of program goals, organizational development goals, and the commitments to be monitored collectively and not in silos. To do this, the department director will maintain a *dotted line* relationship with the Deputy General Secretary.

4. *Other Components of Global Cohesion*

The new GC division will be responsible for ensuring that AFSC lives up to its commitments to integrating climate justice analysis into its work, integrating youth into program work and organization life, and building out research capacities. The division will also be a place where other learning communities, networks, nodes or similar structures might be incubated so that coordination is increased across AFSC.

i. **Climate Justice**

The Global Cohesion Division will be responsible for ensuring that AFSC lives up to its commitment to integrating a climate justice analysis and focus into its work. Consideration of climate justice concerns, grounded in the impacts on communities, will be written into the TORs of the thematic hubs and has been integrated into the policy department's portfolios, with a focus on understanding the links between climate change and AFSC's work to address violence, displacement, and economic injustice.

The division will also ensure that AFSC has the resources, skills, and tools needed to systematically conduct climate risk and impact assessments and will look for strategic opportunities for sustainably supporting a climate justice agenda that builds from AFSC's community-based work. It could support, amplify and connect climate initiatives developed in country and local offices. This may mean building relationships with outside experts or organizational partners.

While a new climate justice staff person will not be added immediately, additional climate justice capacities may be added in the future if need is identified, and funding is available.

ii. **Youth Work**

Youth work will continue to be supported through the hiring of a Global Youth Director. The Youth Director will report to the AGS GC.

In this role, the Youth Director works to strengthen the connection between and increase the impact of all US and International programs within AFSC working to develop young leaders for social change and their meaningful integration into our programmatic systemic change efforts. The Director also supports efforts

that ensure youth perspectives are heard and included in decision-making, analysis, planning, implementation, monitoring, evaluation, and learning processes and will convene the Youth Network.

The director will connect into the various hubs that are a part of this division, particularly the equity hub. The Director will work intersectionally with AFSC's programmatic and operational teams and will serve as a primary resource to mainstream the perspectives and presence of young people in organizational life.

The Youth Director and their work will be resourced through the division budget.

At present, we envision the Youth Director overseeing the new Emerging Leaders for Liberation (ELL) program. This is one area that requires further discussion with related staff, and once a Youth Director is hired.

iii. Research

Building out a research team that pulls together current research staff from across AFSC to meet and share ideas, learn from each other, build capacity/skills to support existing research projects, and document and share new ideas and best practices will be a responsibility of the AGS.

A group of research staff started meeting during the restructuring process, and that group might form the core of a sustained node/network to support a more robust research agenda that would be integrated within our program and policy impact approaches. Initially, a current staff member could facilitate this group and schedule meetings, help set agendas, administer budget/expenses, and take/share notes.

The role of leadership of the research team would be written and accounted for in the staff facilitator's job description. In the future, the position might be staffed if that is determined to be appropriate and funds are available.

iv. Learning communities, nodes, and working groups

This division will also serve as a place for supporting and resourcing future global learning communities, nodes, working groups or similar structures that pull together staff from across the organization where shared methodologies, topical interest, or other issues call for collaboration/coordination. The need for learning communities, nodes, networks, and/or working groups might be identified by the thematic hubs, or these structures may pull together at the initiation of staff from across AFSC.

The division will not control these groups, but it will be a place that these groups can turn to for support. The division will also work to ensure that learning communities, nodes, and working groups are truly representative of all parts of the organization.

5. Leadership and List of New Priority Positions within the GC Division and Related Costs:

We anticipate the following GC staffing priorities:

- Associate General Secretary – Global Cohesion Division - *see Annex A for preliminary list of qualities, roles and responsibilities*
- GC Support staff
- PMEL Coordinator

Modest administrative and travel expenses will also be reserved.

New, additional expenses for thematic and other hub convenings and activities, added capacities (e.g., Climate Justice) will be supported from the SPIF (Strategic Plan Implementation Fund).³

	Division	Salary *	Fiscal Year
GLOBAL COHESION			
Staffing Expenses			
AGS- Division for Global Cohesion (GC)	AGS-GC	\$ 135,000	FY23
Support staff - AGS-GC	AGS-GC	\$ 60,000	FY23/FY24 **
PMEL Coordinator	AGS-GC	\$ 65,000	FY23/FY24 **
		\$ 260,000	
Non-Staff Expenses			
Division for GC Admin and Operational Support	AGS-GC	\$ 30,000	FY23
Preliminary Global Cohesion Budget		\$ 290,000	

* Salaries are approximate

** Through the FY23 budgetting process, phasing of new positions will be determined based on priorities and funds availability.

With that, several existing positions will also move into the Global Cohesion Division. For now, those include OPPA and PMEL staff as well as the Youth Director and possibly the Emerging Leaders for Liberation Director.

Links of Global Cohesion Division to Governance: It is envisioned that the newly established division, through the AGS-GC and other division staff, will be key interlocutors with the Board Program Committee (or the proposed Strategic Program Committee) where issues of US-IP collaboration, intersectional commitments, global policy and program impact are brought forward. Staff within this Division will be active participants in the proposed Global Program Meeting.

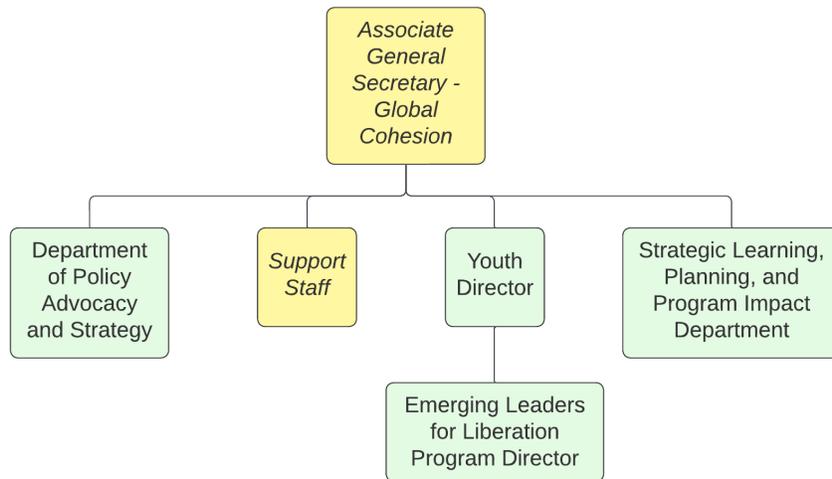
6. Open Questions for Further Discernment

As dialogue continues in the coming months, there are several outstanding questions for us to address. Because we both focused on the bigger picture and wanted to ensure that we had necessary voices at the table (including those staff who were on sabbatical), the following items will need to be explored moving forward:

1. What is the role of the Global Cohesion Division in relation to programs with global (US/IP) emphasis (e.g.. Palestine Activism)?
2. What is the role of the Global Cohesion Division in relation to programs that are predominantly research oriented (e.g., Economic Activism)?
3. What is the relationship between the new Emerging Leaders for Liberation program and the Youth Director, US Programs and Advancement?
4. Should Quaker Engagement continue to be placed under Advancement? (Which also houses AFSC Alumni work and other public engagements).

³ Following staff restructuring, it is anticipated that a Strategic Plan Implementation Fund from the Segregated Reserves Fund, will be approved by the Board, to seed new time-bound plans and activities linked to the SP.

This chart shows the staff units within Global Cohesion



(Note: Emerging Leaders for Liberation Program is still under-discussion)

Yellow boxes are new positions (2). Green boxes are positions and teams that exist elsewhere in the organization to be moved within this division.

Below is an example of a **hub structure** within Global Cohesion. Each hub is a coordination point for many within Global Cohesion, US, International Programs, Communications, Development, and DEI to learn and coordinate strategies across the organization. They will be based on the programmatic goals of the strategic plan.

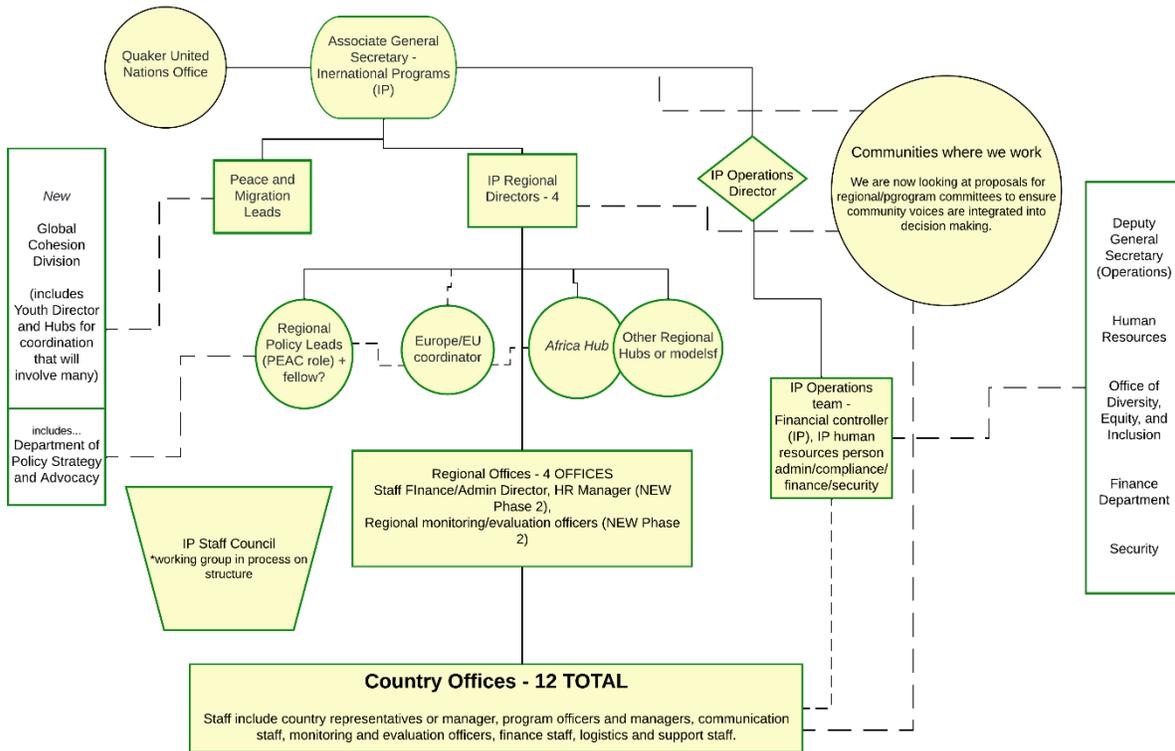


(Note: Cloud-shapes are hubs that bring people together across parts of the organization to engage and work together. Ovals are staffed positions and offices. Orange areas are in the Global Cohesion Division.)

IV. INTERNATIONAL PROGRAMS DIVISION

Over the past six months, IP staff met a number of times to review and refine elements of the IP [Restructure Proposal](#). IP regional directors, country representatives, program directors, and policy staff looked at the original proposal. Below are key points that came out of the consultations including some revisions.

All the work is grounded and rooted in the communities we serve. The governance models and decision making should reflect the voices of our communities with more engagement with our partners and intentional engagement between executive committees, unit leadership and leaders within the communities we serve.



See Annex C for Description of Solid and Dotted Lines

We are proposing **Peace and Migration Lead positions**. Based on Quaker values, the Leads will lead International Programs (IP) in the development of strategic objectives for the thematic goal. The lead will advise and mentor program staff on systems change in the field, supporting country and program teams to develop and implement monitoring, evaluation and learning (MEL) plans, build networking, represent AFSC in global conversations around peacebuilding and migration. They partner with the Regional Directors in International Programs.

Leads will focus on advising on best practice working closely with program teams, leading global DEPs (Dialogue and Exchange Program) on thematic areas in collaboration with relevant country teams, supporting PMEL, strategic objective setting and adding IP capacity in global spaces around peace and migration and its intersection with climate justice and organizational commitments.

The Peacebuilding and Migration Leads will promote the American Friends Service Committee's (AFSC's) peacebuilding and migration work around the world with regional, country and program directors. They will

build networks that benefit programs and identify opportunities for leads and program staff to bring the AFSC narrative to external audiences. AFSC has a 10-year strategic plan with three key program themes (Just Peace, Just Migration and Just Economies). Approximately 60-70% of the current international programs have a peacebuilding primary goal and 30% in migration (a growing area) with the remainder in just economies.

The Leads will report to the Associate General Secretary for International Programs and will be part of the IP management team which includes the Operations Director and the Regional Directors. The Leads can be remote or based in any of the four international regional offices or in the central office and will oversee the global peacebuilding and migration portfolios with the Regional Directors.

The Thematic Leads are new positions critical to implementing AFSC's strategic plan. The Peacebuilding Lead and Migration leads are responsible to help develop a cohesive peacebuilding and migration strategy across our 17 country programs. They will develop and manage the Just Peace and Just Migration IP budget in collaboration with the Operations Director and the regional directors. They will support Regional Directors and Country Representatives on programmatic, communication, resource development matters related to the global work advising teams to develop and implement proposals and plans that are strategic and effective. They will report to the Associate General Secretary and will dedicate 20% of their time to the Global Cohesion Division, more specifically to the Global Peace and Global Migration Thematic Hubs, which the postholders will assist in forming and helping lead. They will spend a portion of their time collaborating with similar positions developing US work. They will co-manage the Global Dialogue and Exchange Program in close collaboration with the relevant program teams. They should have extensive and in-depth life experience and knowledge of Global South context, be a skilled cross-cultural facilitator and communicator experienced in public speaking, convening, and amplifying voices of global peace practitioners, proposal development and donor engagement.

IP Regional Leadership: Though much discussion was given to the idea of organizing international programs solely by issue outcomes, the IP chart includes two thematic leads on peacebuilding and migration, while retaining the regional leadership structure. This is best practice within INGOs and donor governments because much of IP funding comes through government donors that focus on specific regions, and because grants from these sources often require a senior level staff member associated with a specific region. Additionally, if the global trend of shrinking civil spaces continues, AFSC regional staff may represent a critical foothold to continued work. Finally, as we live into the new strategic plan, programs internationally are organizing around regional advocacy goals, which requires a high level of geographic, regional coordination. The Africa Hub is an example of this.

In the next structure, Regional Directors would deepen leadership/management of regional program strategy and context, visibility/outreach and networking in regional donor, multilateral, and INGO spaces. The RDs (Regional Director) would be expected to be well versed in the overall organizational program goals and analysis within their region/countries and the intersection between them. RDs with country representatives would be responsible for successful implementation of country and regional programs and grant deliverables but would be bolstered by the IP operational units added staff and centralized policies and systems (aim to decentralize decision making as much as possible) so they spent less time on operations. The country offices and regional staff still report to RDs but staff here will have more operational support.

Links with AFSC policy office: All four regions have an IP policy coordinator/director reporting to the RD (Regional Director) with dotted lines to OPPA (Office of Public Policy & Advocacy) and QUNO (Quaker United Nations Office). The PEACs will have a different title (job description being seasoned) but will remain policy/advocacy staff for the region/s. We heard a strong articulation that we are missing an organization

wide strategic plan for advocacy. PEACs would have a dotted line to OPPA and QUNO to ensure a reciprocal team mindset and accountability on goals and strategy.

We also added a Europe/EU coordinator which is perceived as a phase 2 priority contingent on the availability of funding. This position is new and would work with the regions (dotted line to policy staff) to coordinate programmatic and advocacy work in Europe. It would support programs like the Africa Hub to meet programmatic and advocacy objectives in the EU. It could track and engage in EU conversations that have broad implications for our programs like the regional programmatic work (for example how Europe policies and funding is shifting because of Ukraine invasion). It could supervise the Under the Mask project as EU is way ahead of the US on conversations related to restricted space and the evaluation showed broad support among key people and institutions in Europe.

Leadership approved the two new operations staff for human resources and finance much earlier in late FY21/early FY22 and incorporated them in this year’s budget. These two roles have been under discussion for some time, outside of the restructuring. It simply happens that these hirings coincide neatly with this process, and will serve the new structure exceedingly well. The finance position has been filled and a search is underway for the other. See the document ([Building and Supporting International Programs September update](#)) for details. The finance position is integrated within an international operations team but works directly with the CFO; and the HR position will work closely with and have dotted lines to our global HR and DEI offices (see Annex C for clarification of dotted-line relationship). In this proposal, we focus on creating global systems and processes that are equitable and supporting excellence in operations so that regions and country offices have appropriate autonomy, clear processes, and fewer obstacles in their day-to-day work. Regions have identified a need for more support at the regional and country level especially around project level monitoring, learning and evaluation and regional human resources staff. We will assess these needs in phase two, budgets permitting.

We proposed an **IP Staff Council** as a space for IP staff to come together and form collective opinions on various organizational issues across regions, to balance imbalances and create equity for IP staff, provide a space for IP staff to convene to raise issues, concerns and share ideas for improving their work, morale, wellness and job satisfaction. IP staff are meeting together across regions together to co-create this council. The staff council is connected to country, regional and operational staff and will have direct access to leadership, including HR and DEI. The Working Group has been assembled and is reviewing a draft charge through a co-design process that will complete in August.

Costing of additional two thematic lead positions will be incorporated in the FY23 budget. Depending on funds availability, phasing of positions may need to be considered. It is estimated that the new positions as well as their related thematic activities will cost around \$230,000 annually as detailed in the table below.

	Division	Salary *	Fiscal Year **
INTERNATION PROGRAMS - THEMATIC LEADS			
Staffing Expenses			
Just Peace Thematic Lead	AGS-IP	\$ 100,000	FY23
Just Migration Thematic Lead	AGS-IP	\$ 100,000	FY23
		\$ 200,000	
Non-Staff Expenses			
IP Thematic Leads Operational Support	AGS-IP	\$ 30,000	FY23
Preliminary Budget for IP Thematic Leads		\$ 230,000	

* Salaries are approximate

** Through the FY23 budgetting process, phasing of new positions will be determined based on priorities and funds availability.

V. APPROACH TO US STRUCTURE

The US Co-Design Work Group (USWG) continues to put significant work into its proposal and we are very supportive of the group having more time to finish its work.

As proposal development advances, there are elements of the US structure that require more and deeper consultation, to ensure the proposal results in a truly collaborative co-design. The General Secretary, accompanied by members of the LT, will engage directly with the USWG as it works to produce a proposal with a clear and coherent structure that provides sufficient programmatic support, strategic plan alignment, and setting the foundation for healing and movement forward. We hope to conclude our iterative discernment with the US Working Group no later than September (although it could be sooner) to ensure the concepts of the final proposal are reflected in the FY23 Budget.

The following are examples of elements in the current version of the USWG proposal that the Leadership Team supports:

- A hybrid of thematic and regional leadership
- The establishment of Thematic Groups, each convened by a Thematic Lead and comprised of local program staff, who collaboratively plan, develop and implement thematic and cross-thematic strategies. While they have budgets and dedicated staffing, Thematic Groups do not comprise new Units or Divisions in US programs.
- The creation of a US Programs Council (composed of thematic group leads, regional leadership, AGS US, US Programs Director, and representatives from OPPA, PMEL and administrative staff) that serves as a decision-making, consultative and information-sharing body focused on the integration, support and resourcing of work within the US Programs Portfolio.
- The expansion of local program committees to all US Programs, with the goal of establishing solid connections to staff committees and AFSC governance structures.

Over the next several weeks, the group will continue to refine and further develop the proposal, and begin deeper exploration and discernment around issues related to program-based (thematic) planning and budgeting, budget sustainability, roles and responsibilities of thematic and regional leadership, reporting relationships and decision making. As the group further refines the proposal to address these issues, there will be intermittent meetings between the USWG, General Secretary and other Leadership Team members to support constructive dialogue and alignment between all parties before the final proposal is submitted for review and approval by the General Secretary.

While still very much under development, more details on concepts under consideration can be found here, in the working group's most recent draft proposal: [US Co-Design WG Draft Proposal \(May 5\).pdf](#).

The Leadership Team is most appreciative and impressed with the many creative ideas and concepts reflected in this document.

VI. COSTING TOWARD SUSTAINABILITY

Sustainability is one of the key internal organizational goals set in our strategic plan. For the past four years we have worked diligently to break the cycle of deficit spending and depleting our reserves. We have not only produced balanced budgets, but have achieved surpluses that have rebuilt our reserves to a healthy level. There are many factors that contributed to this success: increased revenues from fundraising, thoughtful budgeting, decreased spending due to COVID restrictions (eg. travel) and other controls, PPP

federal funds, among others. At the same time grant income nearly doubled and staff continued to receive annual Cost of Living increases.

The Leadership Team remains committed to all of the above, and to collaboration with the Board Treasurer and the Stewardship Committee to ensure sustainability. The costs of additional positions due to restructuring will be slowly incorporated as we continue the careful budgeting process that ensures our strategic vision is implemented and programs are strengthened. Often, the decrease in program support is mentioned as a necessary compromise in order to provide greater support for the implementation of the strategic plan. We don't see it that way. Programs can be strengthened through increased fundraising and through better thematic cohesion and collaboration. The Strategic Plan Investment Fund – to be created with Segregated Reserves- will be established to support growth and security, and will be available for our use following Board approval.

- We are committed to presenting ongoing balanced budgets with clearly identified sources of revenue for all expenditures.
- We are committed to rebuilding reserves to cushion us during down years. To date, our general reserves constitute a healthy percentage of our operating budget, moving closer, in a short period of time, toward our goals. This is excellent progress.
- As we build budgets, we are committed to implementing multi-year budgets with realistic assumptions and projections, and monitoring strategies for economic conditions, including downturns in the economy, and monitoring program, organizational and staff spending to ensure continued sustainability.
- We are committed to building strong fundraising-program partnerships to find restricted and unrestricted income to support all parts of the organization.
- And we are committed to ensuring our staff are well compensated and afforded a living wage.

The expected expenses we have put forth are mostly illustrative since there are some projected expenses that we believe will relate to the creation of a new Global Cohesion Division and other expenses that relate to the overall evolution of the International and US Programs. Our current budget (FY22) already incorporated nearly \$470,000 for restructuring expenses. This was a placeholder knowing that we did not have the specificity of positions at that time. We will continue proceeding with care, phasing in if needed, to ensure we are not over-budgeting and staying within our means.

It is important to clarify that our plans include providing resources in support of the newly proposed collaborative activities linked to US, IP, GC Divisions and strategic plan implementation. These will be provided outside of the operational budget. The Leadership Team will work collaboratively to create a multi-year Strategic Plan Implementation Fund (SPIF) fund from Segregated Reserves. This will need to be approved by the Board, ideally at the October 2022 Board meeting. The SPIF will support a variety of activities, including but not limited to convenings, collaborative efforts, seeding new initiatives and projects, campaigns, research, DEI, climate justice capacities, externally facing activities, etc. Amount to be determined (\$2-\$3 million) over a multi-year period and in accordance with our Segregated Reserve Funds Policy. Careful planning will be necessary to ensure clarity on the specific term of initiatives and that their continuity beyond the initial period, if required, will be supported through restricted funds or other modalities outlined at the outset.

VII. ADDITIONAL COMMITMENTS

We are committed to better understanding the **role of leadership** within the organization. We recognize the importance of ensuring that essential voices are at the table to participate in decision-making. It is likely that

new leadership groups and subgroups will need to be created to inform and support organizational functions. These include, but are not limited to, engaging external constituencies (like donors and partners), thought partnering with global programs, and more. Those involved in existing leadership groups, like GPPG, will continue to be essential to the organization. More discussion will be needed in the months to come.

We are committed to becoming a **learning organization**. As such, we recognize that as we begin to live into the new structure, we will need to adjust and make refinements to respond to what we discover. Among other strategies, we intend to solicit staff feedback through formal processes at regular intervals (such as every two years), as well as in other ways on a regular basis. Staff and community feedback will provide the information we need to identify areas that need further development, refinement, clarification or alignment.

Finally, we are committed to bolstering AFSC's **relationship with the Quaker community** explicitly in many places of this structure; but all our initiatives are encouraged to keep Quaker engagement in mind. Quaker engagement is built into our Communications and Engagement team in Advancement, which will be working with thematic hubs and local and country programs to develop rich opportunities for Friends and AFSC to exchange views, work together for change, and make bold statements together. We will start by listening to Friends about opportunities, concerns, and ideas and building a robust regional, local, and global communications with Friends congregations, organizations, schools, and individual Quakers. In the past year, we have more than doubled our number of meeting and church liaisons, to more than 200, and we're still going. We intend to increase the staffing of our Quaker Engagement team to increase capacity, which can ensure better communication and engagement. We will work closely with the Friends Relations Committee and the Corporation for guidance and grounding.

VIII. FEEDBACK

[This memo](#) was prepared to summarize feedback received and related responses.

All feedback session recordings and notes are also posted on [the Restructuring Page on StarCafé](#).

IX. CLOSING

AFSC has made tremendous gains under its current structure, thanks to the profound dedication and relentless work of our staff, partners and communities. Restructuring conversations are never without their difficulties, and we recognize that this process has not been easy. At the same time, we recognize this moment as one rich with opportunity: to make even greater impact, to better support both our staff and our communities, and to fully live into the Strategic Plan's robust commitments.

We also hear and recognize the often-stated need for organizational healing – both internally and with our communities. This process has surfaced questions and dilemmas new and old, as well as many possibilities for positive change. We are committed to exploring a meaningful process for healing as we step into a new structure that seeks to create deeper and greater unity, collaboration and impact.

Finally, we must remain true to our values as a learning organization founded on Quaker principles. As we move forward, we will also commit to evaluating our progress and our alignment to these principles. Our accountability to each other must be steadfast, rooted in our understanding that in all things there is continuous revelation; and in all people and communities, that of the divine.

With gratitude and friendship,

The Leadership Team

Annex A -

Associate General Secretary - Global Cohesion Division

Preliminary list of Competencies, Roles and Responsibilities *(to be expanded on and finalized with HR)*

Competencies:

- While this position will be advertised internally and externally, we strongly prefer that this role be hired from within the organization, as a key aspect of the division's success will be a deep understanding of and ability to raise up and service the spectrum of work across the organization. It is our strong preference that new positions are hired from within the organization whenever possible, while ensuring that roles are filled by those with the strongest qualifications.
- Intimate knowledge/experience of *both* US and IP peace and social justice work, with a rich understanding of peacebuilding in the global south as well as issues of racial justice in the US, and a universal commitment to equity, gender justice and LGBTQ+ rights globally (including, but not limited to, an understanding of ethnic, religious, and other tensions and complexities)
- Experience with/understanding of youth work and organizing
- Commitment to creating a one-organization culture and practice
- Demonstrated capacity to foster and sustain collaboration between departments and units and build upon local work, while shifting organizational culture toward collaboration.
- Experience leading coordinated work and/or a clear understanding of the different roles/skill sets needed for coordinating and building successful unstaffed hubs as compared to direct management of staff
- Demonstrated commitment to collaboration and learning from others across an organization.
- Demonstrated knowledge of systems thinking
- Strong interpersonal skills, with knowledge of and experience in using consultative decision-making processes; experience adapting to changing situations and priorities

Roles & Responsibilities:

- Reporting to the GS, provide overall leadership for the GC Division, maintaining awareness of both IP and US work, contexts, realities, and best practices.
- Facilitate the shared analysis, research, and potentially the development of shared outcomes where there are shared approaches/change goals, as well as advocating for resources within the organization
- Work closely with and have oversight of OPPA and PMEL departments
- Supervise the Youth Director
- Support and oversee efforts for the cross-cutting climate justice SP commitment
- Support the thematic hubs as they build cohesion across programs globally
- Work with staff to develop hub structures) with a view towards ensuring that these new structures work and evolve.
- Convene a division leadership team and facilitate communication/coordination across sub-units/departments.
- Be part of organizational leadership
- Secure and make decisions about division budget distribution (with division leadership team and hub leads).
- Be a voice for AFSC with external audiences.
- Fundraise in partnership with Advancement
- Work with their team to organize cross organization, thematic, or other convenings as well as staff exchanges and other opportunities for building cohesion.

Annex B

Global Cohesion Division - Areas of Agreement and Challenges

Through conversations, surveys, and meetings the WGGC identified a number of key areas of agreement as well as important issues that the new unit needs to consider/address as it is formulated. These ideas have shaped the suggested structure for the new division and should be taken seriously by the new AGS and staff within the division as they begin their work. Summary points are included below.

1. Learn from the past (case studies), what worked, what didn't and what was lost
2. A hub approach that connects many different facets of work for collaboration, coordination and learning
 - a. Needs to be adequately resourced
 - b. Needs to be adequately staffed (including at the local program level)
 - c. It must draw together staff directly connected and accountable to all parts of the organization and unit members won't all be based in Philadelphia but will have links to regions and programs.
 - d. Experiential and language inclusive learning must be included
 - e. Create intentional spaces for creative learning and relationship building
 - i. Coordinated programming and actions work/are effective when space and resources (human and financial) are provided to allow staff to meet in person and develop shared strategies, actions, and work.
 - ii. Bringing staff together (both in person and virtually) for joint learning, skills building, information sharing, planning, reflection, etc. builds relationships and collaboration.
 - iii. Staff exchanges, site visits, and staff delegations build understanding, cross program fertilization, and shared identity
 - iv. Formal regional and cross regional gatherings that bring together staff build cohesion.
 - v. Conferences, issue based convenings, and Dialogue and Exchange Programs (DEPs) enhance learning, cooperation, and cohesion.
 - vi. A key role of this unit should be to convene staff from across the organization to identify points of connection and to help foster organic connections, the unit should not be a place for developing work independent of local programs or work that is later forced on programs from above.
 - vii. Commit to taking the time that is necessary to develop this unit appropriately, it doesn't need to come into being fully formed.
 - viii. Build this division so that it can be supported by the organization and to stop the culture of competition. Be vulnerable and open to learning from each other and "move at the speed of trust".
3. Praxis: Shared analysis, action, and reflection in an iterative cycle
4. Develop monitoring and evaluation mechanisms to learn from our work
 - a. Knowledge needs to be archived and shared internally, but also with partners and communities
5. Set up accountability measures to hold ourselves accountable to each other, to the goals of the unit, our cross cutting-commitments and the communities with which we work
6. Trust as a key ingredient in the implementation of whatever is decided upon, trust during the process as well is also integral
7. A global cohesion/learning unit could help AFSC function more as an ecosystem / can help us break down the US-IP silos

What are the key issues/organizational challenges related to global planning, collaboration, and learning that must be addressed to move forward?

1. AFSC planning and reporting processes were originally designed with a core function being to generate reports for internal accountability purposes (e.g., generating data for governance advisory committees). Current staff envision a more vibrant function that amplifies learning and collective impact. This vision was encapsulated in Organizational Development Goal 3 in 2020.
2. AFSC does not invest resources (human or financial) in building collaboration
3. AFSC Planning and budgeting systems do not encourage collaboration
4. US/IP planning occurs in completely separated spheres while US programs and IP programs have different cultures and operate under different models.
5. While networks have developed to help coordinate US work, networks and structures for global cooperation across AFSC don't exist, and opportunities for program staff to meet are few and far between.
6. Narratives that further division and distrust exist between the US and IP and hamper collaboration.
7. Language justice
8. Time allocation when staff already have roles and responsibilities that already take 100% of their work time.

ANNEX C

Management Matric relationships with Solid and Dotted Lines

The term “dotted line” comes from the lines on an organizational chart. The **solid line points to an employee’s primary supervisor**; a dotted line indicates a secondary supervisor.

A dotted line is a hybrid of divisional and functional structure, with staff or team members expected to take more responsibility for their work and in most cases, report to more than one person. **Dotted lines within a job description indicate that employees or managers report to more than one person.** The primary supervisor is your day-to-day manager, approves an annual work plan, priorities and assesses performance. The secondary supervisor has technical skillset that is relevant. For example, a financial person may report to both their direct manager (reflected as a solid line in an org chart) as well as a unit manager (reflected as a dotted line in an org chart) if their work is cross-functional or involved in another department in some capacity. This leads to a dotted line reporting relationship in the organizational structure with more than one person overseeing an employee's performance within a project or unit.