

## Panel Discussion: Strategy and Culture Change

**Panellists:** James Sandbach, Jo Hickman, Liz Bayram, Lucia Palma

**Theme:** Rethinking strategy, wellbeing, and leadership in the advice sector

### Jo Hickman: The Hamster Wheel Report

- **Wellbeing is systemic:** It's about how work is led, managed, and organised
- Healthy organisational cultures offer **"good jobs"** people want to stay in
- **Wellbeing must be central** to strategy, with shared accountability
- **Individualised wellbeing approaches don't work**—systemic change is needed
- Overwhelm, stress, and burnout hinder strategic thinking
- **Key metaphor:** The hamster wheel—step off, pause, and reflect
- Allocate time for **strategic development**, not just reactive work

### Liz Bayram: Strategy as a Tool for Impact

- A **clear strategy** improves decision-making, values staff/volunteers, and shapes services
- Strategy is key to **retention, motivation, and agility**
- Helps prioritise, avoid duplication, and foster innovation
- Performance reviews should reinforce **shared goals and contribution**
- Recognise the **80/20 rule**: 80% effort may only yield 20% results
- **"Less is more"**—focus on doing fewer things well

### Lucia Palma (Advice First Aid - AFA)

- Vulnerable individuals often seek help from **trusted community members**
- AFA offers:
  - 2-day training: active listening, confidentiality, spotting advice issues, signposting
  - Online upskilling courses
  - Dedicated referral route to Citizens Advice
  - Q&A sessions with advisors
  - Peer resource-sharing network
- AFA builds **community capacity** and creates **inclusive pathways** into the advice sector
- Helps reduce demand on services through **accurate signposting and early intervention**

### 📄 James Sandbach: Toward a London Advice Strategy

- Strategy work emerging from **Propel, ALP, AWDF**, and other partnerships

- London's advice sector faces **massive inequalities and sustainability challenges**
- No single strategy yet—working on a **roadmap for a London Advice Strategy**
- Strategy must be **co-produced**, integrating **lived experience** of clients and workforce
- Services should be **user-centred** and reflect workforce diversity
- Strong consensus: need for a **clear, coherent strategy** for London's advice sector

## Discussion Highlights

### Advice as a Health Issue

- Overwhelming demand, especially for **debt advice** (1.5–2 million Londoners)
- **Early intervention** increases demand but improves outcomes
- Prevention often sits **outside the advice sector**—how can it be integrated?
- Example: *Advice NI* on energy efficiency and household cost reduction
- Tension between **prevention, intervention, and scale**
- Success = **not needing to see the client again**

### Culture & Reflection

- Organisational cultures are often **unconscious and reactive**
- Need time and space to **reflect and innovate**
- Stepping back improves **precision and effectiveness**
- More **early referrals** reduce crisis contacts
- AFA helps reduce inappropriate referrals and builds **community resilience**
- **Public legal education** empowers individuals

### Leadership & Change

#### “Culture eats strategy for breakfast”

- Issues like **diversity, founder's syndrome**, and **resistance to change**
- Build **leadership capacity** across the organisation
- Leadership isn't just positional—it's about **influencing dynamics**
- Succession planning is about **building skills and knowledge**
- Leadership can emerge from **outside the sector** (e.g., PROPEL)
- Challenge fixed ideas of leadership—focus on **collaborative influence**

### Campaigns & Sector Dynamics

- Campaigns can feel like **action**, but risk becoming **repetitive cycles**
- The sector is often **resistant to change**
- Need to rethink how we **strategise, lead, and adapt** to complexity