

LASTING LEADERSHIP



SUCCESSION, EMPOWERMENT, EQUALITY

A guide to sustainable leadership
for non-profit organisations

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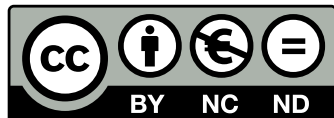
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NOTE ON LANGUAGE AND TERMINOLOGY

This guide is aimed primarily at organisational leaders (chief officers and senior managers) but it will also be useful for other managers and aspiring leaders, boards, policy makers and funders. Parts of the guide may be more relevant to you and your organisation at different times. It is therefore not intended as a form-filling exercise but rather, as a tool to explore and plan for your own, and your organisation's, approach to sustainable leadership.

We use the term 'leader' to refer to managers but also anyone taking the initiative to work on their organisation's sustainability. Where we feel it is important to distinguish the two, this is shown in the text. We use 'non-profit' in preference to 'voluntary organisation' or 'charity' because it is broad enough to include social enterprises and, importantly, public sector organisations. It is shorter and less clunky than the more common 'not-for-profit' and is more recognisable to non-UK audiences.



FOREWORD

There is no organisational sustainability without sustainable leadership.

Following the popularity of *The Lasting Difference tools for organisational sustainability*¹, we developed this new guide to help organisational leaders explore, assess and prioritise sustainable leadership.

This resource addresses recurring themes emerging from our work and the Path to Impact report¹: leadership sustainability is the number one challenge facing non-profit organisations and the sector.

To respond to this challenge, during 2019 we undertook research to better understand what is meant by sustainable leadership. This included a global literature review; focus groups with over 70 non-profit leaders; learning sets; workshops; and conference inputs.

Our research and practice are ongoing. We hope this guide contributes to further conversations about this vital but little-understood topic.



**LEADERSHIP
SUSTAINABILITY
IS THE NUMBER
ONE CHALLENGE
FACING NON-PROFIT
ORGANISATIONS
AND THE SECTOR**



Jen Curran, Lead Associate,
Wren and Greyhound

¹ Path To Impact – Final Report, ACOSVO and CO³, 2018.

THANK YOU



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PART ONE:

BACKGROUND

AND CHALLENGES



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BACKGROUND

There is a wealth of information on leadership styles, models and approaches – but far less exists on the topic of leadership *sustainability*.

Sustainable leadership, like organisational sustainability, is challenging and complex. It requires organisations and their leaders to respond to the technical and adaptive² challenges of complex, evolving environments. Complexity requires leaders to be comfortable with uncertainty, open to challenging the status quo and facilitating leadership across their organisations. These ideas are easy to grasp but at an organisational level they are harder to translate. And at an individual level, they are extremely challenging. They contradict the ways we have been brought up to think about organisation, control and influence – assumptions that run very deep in our society and organisational systems. This can be anxiety-provoking for everyone involved: it takes trust to promote ownership, participation, agency and self-direction.

Our approach to sustainable leadership is therefore rooted in systems thinking. It is informed by complexity theory, design thinking and sustainability principles from *The Lasting Difference* toolkit, which defines sustainability as *the capacity to make a lasting difference*.³

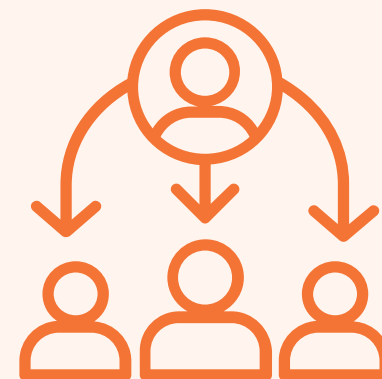
Sustainable leadership requires:

- **PROVIDING COORDINATION, NOT CONTROL**
- **GIVING INFORMATION, NOT INSTRUCTION**
- **OFFERING CHALLENGES, NOT CERTAINTY**
- **SEEKING COMMITMENT, NOT CONFORMITY**

DEFINITION:

We define sustainable leadership as:

**DEVELOPING SYSTEM,
ORGANISATIONAL AND
INDIVIDUAL CAPACITY
TO ENABLE LEADERS TO
EMERGE, EVOLVE AND
EXCEL**



² The Practice of Adaptive Leadership, Ronald Heifetz

³ The Lasting Difference: tools for organisational sustainability, www.thelastingdifference.com

CHALLENGES AND PARADOXES

Our *Lasting Difference* research and consultancy with hundreds of organisations since 2013 reveals common sustainable leadership challenges, paradoxes and principles.

THE TIME CHALLENGE

Time is our most precious resource, but we don't protect or use it well

Over the years, the non-profit sectors have had to do more and more with less and less. This has led to increasing attention being given to how to make most effective and efficient use of resources. But often one of our most precious and scarce resources is overlooked – time. As with other resources, our time is limited – spending more time on one thing means spending less on another. If we want to develop sustainable leadership, time must be given to development, planning for the unplanned, sharing knowledge and learning. It will never happen otherwise. Think of time being *invested* rather than *spent*.

THE LEADERSHIP MYTH

The exhilarating side of leadership gets fetishised – the exhausting reality gets ignored

Leadership is often portrayed as exciting, visionary, creative and inspiring. But the day-to-day reality of leadership is hard work. It requires managing expectations, juggling competing priorities, pushing against the status quo, and, at times, making unpopular decisions. It can be exhausting, isolating and overwhelming. Sustainable leaders need regular opportunities to connect with their purpose and vision, to sustain their focus and not get pulled out of shape.



PROVOCATION:

HOW MUCH TIME DO YOU HAVE?



THE CARE PARADOX

Organisations that care for people, society and the environment don't always care for themselves

Most people who work in the sector are driven by a passion to make a difference. This passion drives them to do the best (and most) they can. A 2019 survey⁴ showed that Chief Executives regularly worked an additional 10 hours each week unpaid – equating to an extra three months' work per year. It is not only CEOs that do this. Over time this impacts on wellbeing, leads to exhaustion and results in serious health problems. Sustainable leaders look after themselves and the people around them. Put simply, if we don't take care of ourselves – and encourage our teams to do the same – we cannot do our best work for the people, communities and issues we serve.

THE CONTROL PARADOX

The more that managers try to control, the more resistance they encounter

One of the core messages about sustainable leadership is that organisations should avoid over-reliance on one leader. This suggests that sharing and devolving power is key to success. But this requires those who hold the power to be willing to let go of some of their control. And of course, for those who are asked to take on more responsibility to have the support, time and capacity to do so. CEOs often speak about their desire to delegate. In practice, this delegation often isn't easy, and managers don't always like the results of what emerges when people start to have control. Sustainable leaders know what to let go of.

THE TRUST PARADOX

Delegation requires trust, but without delegation, trust won't exist

For succession and devolved leadership to succeed, managers need to be willing to truly trust their teams to deliver. If leaders don't step back, no-one will be ready to step up. But if no-one is ready, leaders won't step back. Opportunities for development and delegation are therefore critical, to build trust and leadership capacity.

⁴ <https://www.charitytimes.com/ct/charity-ceos-overworked-acevo-survey-finds.php>



PROVOCATION:

**HOW MUCH SHOULD
YOU CONTROL?**



THE EQUALITY PARADOX

Organisations that promote social justice and equality don't always embody those values in their approach to leadership

The non-profit sector is values-based – equality, diversity and inclusion are the foundation of many organisations' vision and ethos. But inequalities still exist in non-profit sector leadership and governance. Two-thirds of the non-profit workforce are women⁵ but almost two thirds of Trustees are men⁶. In this context, leadership should not be discussed without acknowledging its gendered nature. Alongside this, people who face additional barriers to power are underrepresented in leadership roles. There is more to be done to ensure equalities in leadership are addressed, particularly in senior and governance roles. Seeing leadership through the lens of feminism, equalities and intersectionality is essential to increasing the diversity and sustainability of non-profit leadership.

We can sum up these challenges in six key principles. Sustainable leadership:

1. **Requires time.** Leaders and teams need time and space for development, planning, sharing knowledge and learning.
2. **Connects with vision and purpose.** Sustainable leaders focus on work that connects with their vision and purpose.
3. **Prioritises self-care.** Leaders need to give themselves, and their teams, permission to take time for self-care. Self-care is an essential part of the job – not a perk or a luxury.
4. **Devolves authority and shares power.** Managers must be willing to relinquish some control. And teams need to have regular opportunities to build their leadership knowledge, skills and experience.
5. **Builds capacity.** Sustainable leaders trust themselves to let go. Their teams trust that leaders will support their efforts and decisions.
6. **Requires equality and diversity.** Leadership roles must be open to all. Policies and structures should encourage inclusion and be reflective of our society.

SUSTAINABLE LEADERSHIP:

REQUIRES TIME

CONNECTS WITH VISION AND PURPOSE

PRIORITISES SELF-CARE

DEVOLVES AUTHORITY AND SHARES POWER

BUILDS CAPACITY

REQUIRES EQUALITY AND DIVERSITY

⁵ UK Civil Society Almanac 2019, NCVO





⁶ Taken on Trust, The Charity Commission, Cass Business School and Worshipful Company of Management Consultants, 2017.

These paradoxes and principles are summarised below, along with some simple practices. More detailed examples of sustainable leadership practices are given under each of the four capabilities in Part Two.

PARADOX / CHALLENGE	PRINCIPLES	PRACTICES
<p>THE TIME CHALLENGE</p> <p>Time is our most precious resource, but we don't protect or use it well.</p>	<p>Sustainable leadership requires time.</p>	<p>Arrange, protect and invest time in planning, development and learning.</p>
<p>THE LEADERSHIP MYTH</p> <p>The exhilarating side of leadership gets fetishised, while the exhausting reality gets ignored.</p>	<p>Sustainable leadership connects with vision and purpose.</p>	<p>Create opportunities to focus on your vision and purpose.</p>
<p>THE CARE PARADOX</p> <p>Organisations that care for people, society and the environment don't always care for themselves.</p>	<p>Sustainable leadership prioritises self-care.</p>	<p>Be a role model for self-care, showing that it's essential, not a luxury.</p>
<p>THE CONTROL PARADOX</p> <p>The more that managers try to control, the more resistance they encounter.</p>	<p>Sustainable leadership devolves authority and shares power.</p>	<p>Build systems and structures that support devolved leadership.</p>
<p>THE TRUST PARADOX</p> <p>Delegation requires trust, but without delegation, trust won't exist.</p>	<p>Sustainable leadership builds capacity.</p>	<p>Delegate authority and prioritise learning and development to build trust and capacity across the team.</p>
<p>THE EQUALITY PARADOX</p> <p>Organisations that promote social justice and equality don't always embody those values in their approach to leadership.</p>	<p>Sustainable leadership requires equality and diversity.</p>	<p>View leadership through an equality lens, proactively encouraging and supporting diversity in leadership roles.</p>

HOW TO USE THIS GUIDE

This guide helps leaders and organisations to explore and assess their approach to developing sustainable leadership through:

-  **PROVOCATIONS TO ENCOURAGE REFLECTION**
-  **A SET OF PRINCIPLES AND PRACTICES**
-  **A SELF-ASSESSMENT**
-  **ACTION PLAN TEMPLATE**

These are designed to be used flexibly and we encourage you to find your own ways to do so. There are no ready-made answers, and one size does not fit all. This resource gives you the opportunity to explore where your organisation is, and where you would like it to be.

Four core and interrelated capabilities provide the foundations of sustainable leadership:

- **SUCCESSION PLANNING**
- **LATERAL LEADERSHIP**
- **ATTRACTING THE NEXT GENERATION OF LEADERS**
- **LEADERSHIP AS AN EQUALITIES ISSUE**

Each of these capabilities are explored in detail below, with core principles and practices which are introduced at the beginning of each section, followed by a self-assessment and action planning template.

Quotes are used throughout the guide to illustrate some of the challenges, principles and practices of sustainable leadership. These are taken from our research in focus groups, workshops and stakeholder interviews.



RECOMMENDATIONS

- **THE BEST TIME TO START IS NOW**

Planning for sustainable leadership is best done before a crisis happens.

- **PRIORITISE ACTION**

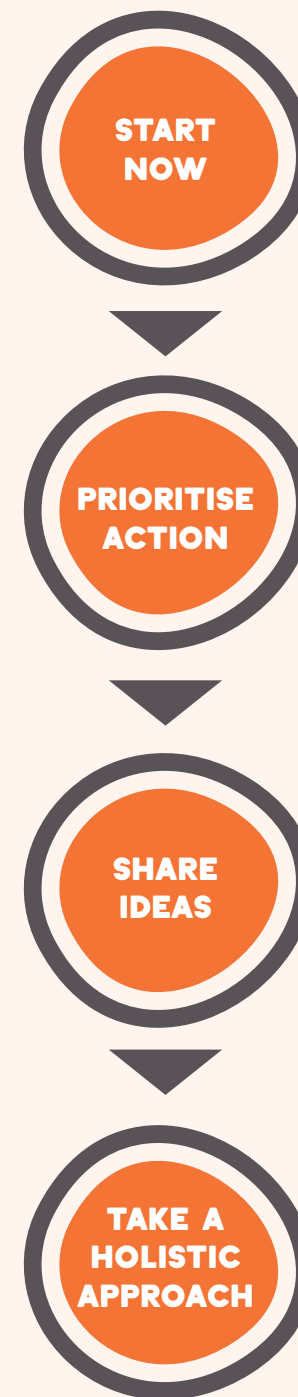
The self-assessment will help identify where things are going well and where action is required.

- **SHARE THE IDEAS ACROSS YOUR TEAM**

The approaches and actions required to improve leadership sustainability are adaptive – they need discussion, sharing ideas and exploring challenges and solutions together. We strongly encourage you to share these ideas across your team to develop collective responses and build ownership of the process.

- **TAKE A HOLISTIC APPROACH**

The four capabilities overlap to support the development of sustainable leadership. Action in one area will undoubtedly have an impact on the others. Taking a holistic approach will bring benefits across each of the capabilities.



PART TWO: THE FOUR CAPABILITIES

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LATERAL LEADERSHIP

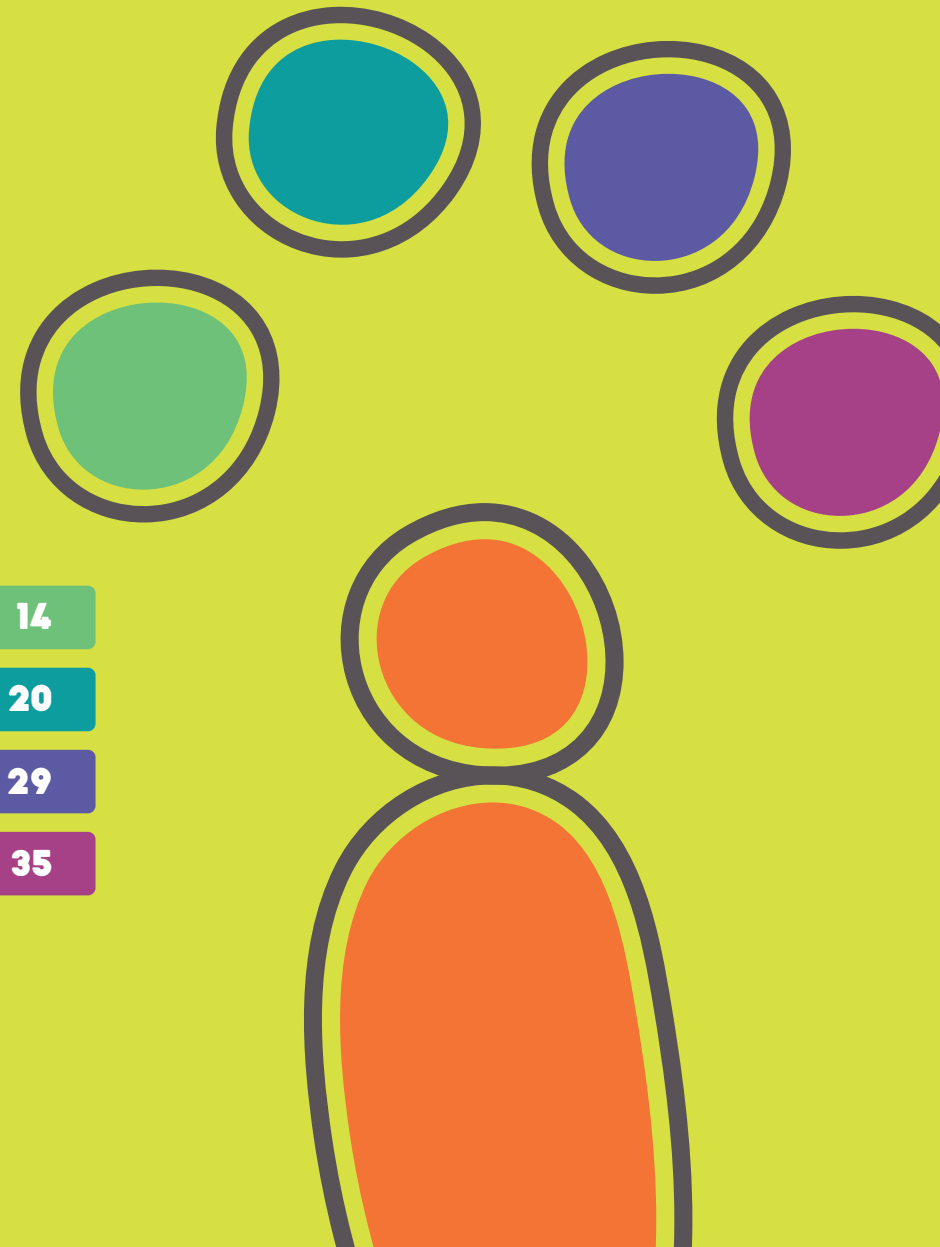
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SUCCESSION PLANNING

THE CHALLENGE

Around a fifth of leaders in the sector are currently seeking a new opportunity. Three quarters of non-profit organisations do not have a succession plan in place.⁷

THE CAPABILITY

Succession planning is part of an organisational approach to capacity building, shared ownership and delegation. It is not about identifying and grooming successors.



PRINCIPLES

Succession planning is a process

Succession planning is a journey not a destination. Experience shows that it is easiest, and most effective, to begin the process before it is needed. Succession planning will ensure the organisation is in good shape for planned or unplanned succession (see below), increasing the chances of post-succession survival by developing capacity within the organisation.

“The process of working through succession issues was as important as the final document that was produced...it was the conversations, reflection, discussion which were essential.”

Unplanned and emergency succession

Examples of leaders becoming seriously ill, or even dying in post, were common in our research. Sadly, it happens, and more often than people appreciate. It can be traumatic. In the event of the worst happening, those who find themselves suddenly stepping up can feel overwhelmed, lost or exposed – often in very public ways due to the outward-facing nature of leadership roles. To help mitigate the risks, prepare people to step up by providing exposure to opportunities to lead. And of course, this also supports planned approaches to succession and the development of sustainable leadership overall.

“The loss of our CEO was a massive blow to the organisation, not just in knowledge and capacity but also emotionally. I stepped up into the role – it was really challenging, particularly emotionally. But having previously been given regular opportunities to undertake key pieces of work – like talking to the media and building my relationships with the board – did help to prepare me to a degree.”



PROVOCATION:

THE ORGANISATION AND ITS WORK ARE BIGGER THAN ANY ONE PERSON

“It is inevitable there will be change. It’s about processes to manage that change, rather than succession planning every tiny detail.”

“I’m embarrassed to admit that I don’t know if we have any succession plan as an organisation or not.”



⁷ Path To Impact – Final Report, ACOSVO and CO³, 2018.

Business critical knowledge – the internal and external environment

Good succession planning considers both the internal and external knowledge that is critical to the organisation. Internally this involves developing and managing organisational knowledge e.g. of processes and of the strategic environment such as policy developments and funding arrangements. Externally it involves sustaining key relationships. Succession planning helps to manage the risks involved in these relationships, such as key individuals moving on from their posts or organisations.

“We developed a questionnaire to capture business critical information...you don’t know what you’ve lost until it walks out the door.”

Don’t assume like-for-like succession

When management (and other) posts become vacant it is worth reviewing the role. The organisation and its environment are likely to have changed, and new priorities and challenges will have emerged. Consider what opportunities the vacant post creates and what the organisation needs now. This will ensure the organisation is responding to its current environment and needs, not historical ones.

Succession planning supports performance

The process of succession planning can help improve performance. It creates opportunities for teams to learn, share information and to generate new ideas and ways of thinking. It requires looking through fresh eyes at established ways of working. This helps challenge the notion of ‘we’ve always done it this way’ – and builds ownership of solutions to tackle future challenges.

Succession is inevitable and should be discussed openly and early

Sustainable leadership recognises that change and succession are inevitable. However, these issues can make people feel uncomfortable. Having regular, open and honest discussions can help people feel more comfortable with succession and cope better when change happens. The organisation and its impact are bigger than any one person or role. Exploring and discussing what to sustain can help in developing sustainable leadership and preparing for the future.

“When I started, I was open that I wanted to give the organisation a five-year commitment – staff were quite shocked to have that conversation in the first couple of weeks. But if people are not aware they can have a false sense of security.”

THE PROCESS OF SUCCESSION PLANNING CAN HELP IMPROVE PERFORMANCE



PRACTICES: IDEAS FOR ACTION

DEVELOP HOLISTIC SUCCESSION PLANS

- Develop a succession plan that encompasses all key roles within the organisation. This includes planning for maternity cover, extended periods of leave, board recruitment and so on.
- Ensure succession plans identify and deal with single person risk – remember that business-critical knowledge is not only held in senior management roles.

BUILD SENIOR TEAM CAPACITY

- Create regular opportunities to develop the capacity of the senior team.
- Involve management team members in leading on key areas of work or acting in absence for the CEO. Not only does this build the capacity of the management team, it increases Chief Officers' resilience by enabling them to discuss challenging issues openly and honestly with their senior colleagues.
- Organise full handovers (briefing and debriefing). It is more than just keeping things ticking over during holidays or unplanned absences, but delegating full decision-making authority.
- Develop relationships between senior team members and key stakeholders, including board members.

"It has to be properly delegated authority. You have to accept decisions taken even if you don't always agree with them."

CREATE KNOWLEDGE MANAGEMENT PLANS AND PROCESSES

- Undertake a knowledge audit that identifies business-critical knowledge. This will include key relationships, sector knowledge, contact details, passwords and so on.
- Remember knowledge is tacit and explicit, a process and not just a product. It is generated and shared through teamworking, shadowing, observation etc. This isn't about duplicating effort, it's about investing in capacity.

Control paradox



EMBED SUCCESSION PLANNING

- Link succession planning with existing processes such as forward planning, risk management and staff development.
- Have regular and planned conversations about succession at all levels of the organisation.
- Include succession planning as a regular discussion item on management team and board agendas.
- Use recruitment, appraisals, and management, board and team meetings to talk about what people know and do, including external relationships.

PLAN FOR RISK

- Link the risk register to organisational succession plans – losing senior leaders is a critical organisational risk.
- Update risk registers at least annually to assess the likelihood and scale of risks.

SUPPORT SUCCESSORS

- Allow new leaders to find their own way and do things differently.
- Where handovers are possible, base them on fact and be cautious of personal opinions and preferences. The key is working out what's important and what's not.
- Once in post, successors need to assess the internal and external environment, identify and talk to key internal and external stakeholders, and choose a way forward that fits best.

EXAMPLES OF GOOD PRACTICE FROM LASTING DIFFERENCE RESEARCH:

- Providing regular shadowing opportunities for staff.
- Appointing one new board member each year to balance renewal and continuity.
- Creating a board and staff subgroup to work on succession planning in a holistic way.
- Developing 'process' documents explaining the specifics of key roles so someone could pick things up in an emergency.
- Creating 'Acting-In-Absence' policies and processes where management team members have regular opportunities to assume the role of the CEO with full delegation of decision-making authority.
- When posts become vacant, reviewing the current needs of the organisation before filling the post.



SELF-ASSESSMENT: SUCCESSION PLANNING

The self-assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence | 1 = Our evidence is mixed or patchy | 0 = We cannot evidence this

However, there is also space for you to make notes and comments, for example if you are discussing the indicators with colleagues or reviewing progress over time. These notes will often be more meaningful than just a score.



	SUCCESSION PLANNING	SCORE	YOUR NOTES
1	We involve appropriate members of the team in developing a succession plan – and it encompasses all key roles, including our board.		
2	Board membership is regularly reviewed to balance continuity and renewal and to ensure its diversity reflects the communities and issues we serve.		
3	Regular opportunities are created to delegate authority and decision-making (e.g. an 'acting in absence' policy for the leadership team).		
4	A regular knowledge audit is conducted that encompasses business-critical information and processes.		
5	Discussions about succession are built into established processes, e.g. risk assessments, staff appraisals, team and board meetings.		
6	Post-succession handovers focus on factual information, and acknowledge new people will bring their own ideas and perspectives.		

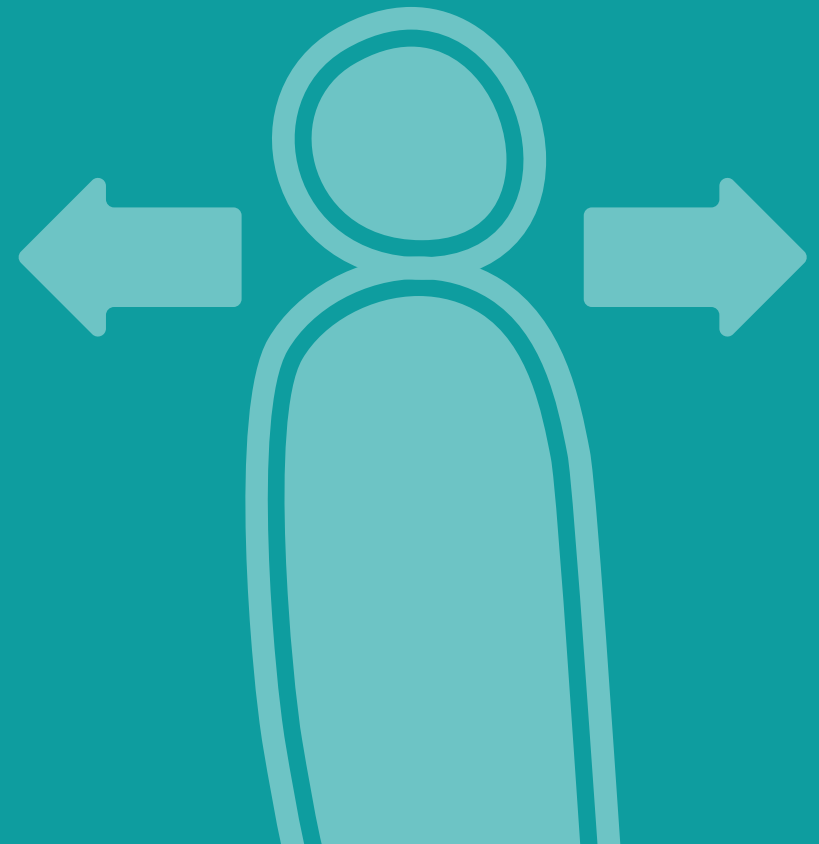
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LATERAL LEADERSHIP

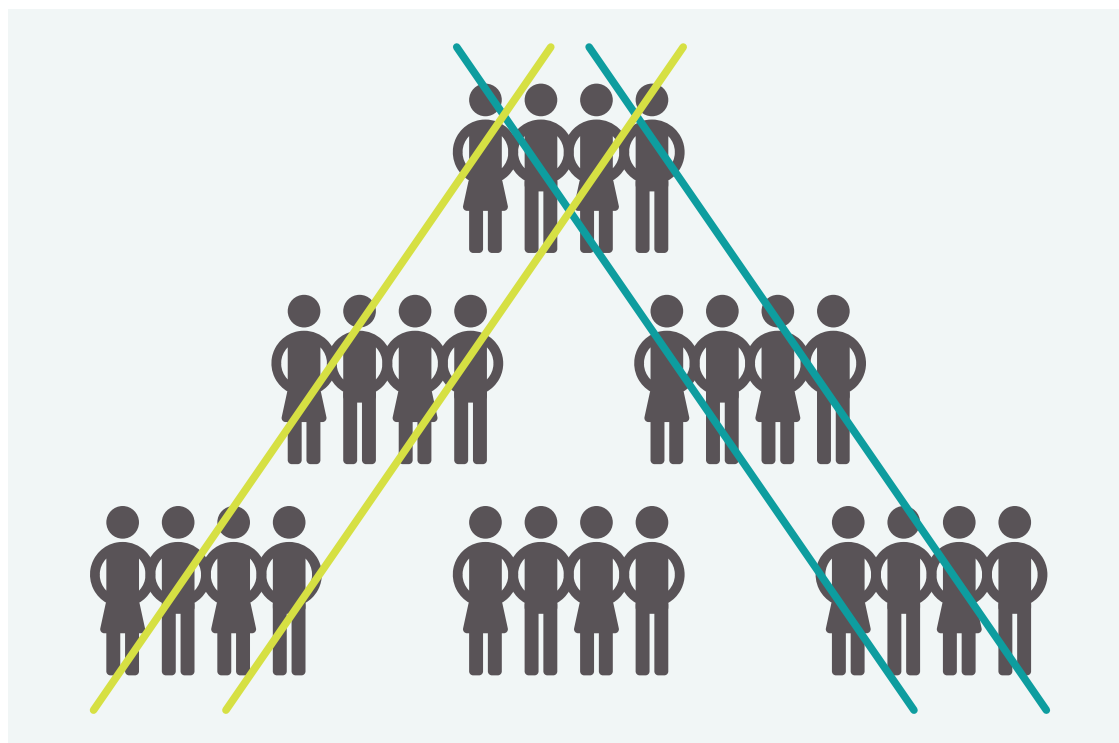
THE CHALLENGE

To build leadership sustainability, organisations should avoid over-reliance on one leader. One person alone cannot deliver an organisation's strategic plan, but strategies are often seen as 'belonging' to the Chief Officer or senior team.

THE CAPABILITY

Lateral leadership involves people taking ownership, autonomy, and accountability regardless of their role or place in the hierarchy. This might sound straightforward in theory. In practice, capacity building requires time, commitment from all levels, a willingness to change – and leaders being prepared to let go.

Lateral leadership – cutting through hierarchies



PROVOCATION:

THERE IS LEADERSHIP IN EVERY CORNER OF YOUR ORGANISATION, WAITING FOR THE OPPORTUNITY TO EMERGE. WHOSE PERMISSION DO PEOPLE NEED TO DO THE RIGHT THING?

“The best thing about the lateral leadership approach was that everyone had a chance to have their say in an understanding environment... this allowed people to flourish and enhance their skill sets – and use their current skill set which is sometimes underutilised in the organisation.”



PRINCIPLES

Leaders are everywhere

Leadership is not about creating followers. It is about equipping others with the abilities and opportunities to exercise initiative and agency. Leadership is more than a job title or positional authority – it's the ability to spot need, identify opportunities and take responsibility. Devolving leadership acknowledges that everyone in an organisation has knowledge, experience, skills and enthusiasm which they can bring to help an organisation achieve its goals – if they are given the opportunity. However, not everyone wants or feels ready to step up – sometimes people need more time and/or different types of support to feel comfortable. Leadership capacity needs to be nourished and nurtured.

Organisational culture can create sustainable leadership – or crush it

Devolving authority requires a commitment from all levels of the organisation to create a culture in which people's capacity for leadership can develop. Traditional hierarchical control inhibits the development of shared leadership and authority – organisational structures and processes need to evolve as agency and accountability develop. This will often be messy at first as new ways of communicating and working develop. Shifting from a hierarchical structure to an adaptive and devolved culture requires a commitment to learning and adapting together, and a willingness to be comfortable with uncertainty as new processes evolve.

“Succession is easy to do when you lead with a devolved leadership style – it's harder in a command and control style.”

It takes trust and courage

Sharing leadership requires a great deal of trust – and a willingness to let go. It requires leaders to be confident in themselves and others. It takes the courage to question and be questioned, to hold others to account and to be held to account. Leaders must trust themselves to step back and trust their teams to step up. Teams must also trust that leaders will encourage and recognise their efforts – not crush or ignore them. Letting go can make managers feel their identity or competence are being challenged – if they share their authority, what is their role? In lateral leadership, the role of leaders is to create other leaders.

“An open-door policy can make it feel that you don't trust people to get on with their job or make decisions – sometimes we need to be less present, not more.”

**LEADERSHIP CAPACITY
NEEDS TO BE NOURISHED
AND NURTURED**



The triangle of trust



**SHARING LEADERSHIP
REQUIRES A GREAT DEAL
OF TRUST – AND A
WILLINGNESS TO LET GO**



It needs time and space

Lateral leadership is a learning process. It is about trying out new ways of working, enabling and supporting people to take ownership of key aspects of the organisation's development and delivery. This can initially feel daunting to all those involved. People can feel unsure if they're 'doing it right', so space and time to reflect with peers and managers is vital. With experience, anxiety will reduce, and confidence will grow. In this way of working, mistakes are seen as valuable learning opportunities.

"My gut instinct is always right. How do I support my team to develop that compass?"

Ownership and agency

In lateral leadership, there is individual and collective responsibility for learning and leading. People need to be accountable to themselves and to each other, their peers as well as their managers. Effective delegation requires defining what success looks like to individuals, to their teams and to the organisation. This helps build ownership of not only the work but the results and their impact.

"This is what I think a leader should be, so I'll be it."

Value different viewpoints

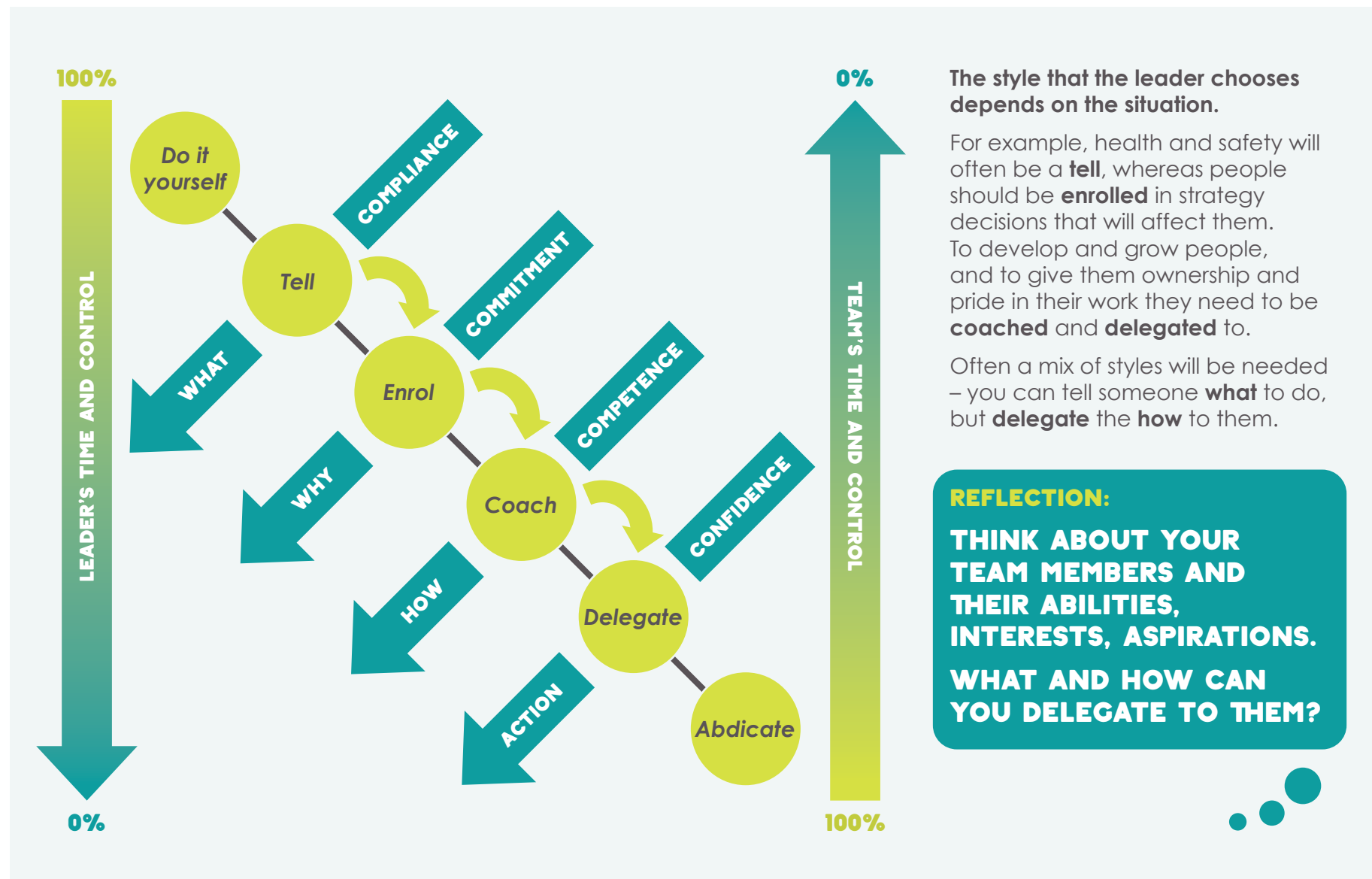
Bringing people together from across the organisation will generate new insights, perspectives and ideas. People from different roles and from different levels will question why things are done in a particular way. They will bring their own experience of how things impact on their work and role. This is hugely valuable – it leads to fresh ways of approaching challenges and gives people an appreciation of others' roles. The organisation is more than the sum of its parts – bringing people together builds an understanding of how all the parts, and roles, combine to achieve organisational goals.

"This has been a good opportunity to meet with staff from other areas to hear about good practice, to discuss ideas and issues. I also found that working with people from other areas led to thinking differently about some of the issues – seeing things from different perspectives."

**BRINGING PEOPLE
TOGETHER FROM ACROSS
THE ORGANISATION WILL
GENERATE NEW INSIGHTS,
PERSPECTIVES AND IDEAS**



Leadership delegation choices





PRACTICES: IDEAS FOR ACTION

BUILD OWNERSHIP OF ORGANISATIONAL VISION AND OUTCOMES

- Share ownership of organisational vision and purpose by starting with the ‘why’ – generate agreement about the outcomes the organisation wants to achieve.
- Involve people in defining what success looks like and holding themselves to account.
- Let go control of every small detail. Agree clear outcomes, then get out of people’s way.
- To help people build skills and confidence, develop processes and tools that help guide decision-making, based on organisational values and outcomes.

“Previously we were given a strategic plan and told to implement it. The lateral leadership approach, where we explored the ‘why’ for our organisation, our teams and ourselves, gave ownership of the strategic plan and demonstrated how each person has a role to play in its implementation.”

AGREE WHAT DEVOLVED AUTHORITY LOOKS LIKE

- Have open and honest conversations about top-down and bottom-up engagement and empowerment.
- Explore what devolved authority really means in your organisation, and question if your current structures and processes enable it or inhibit it.
- Develop new systems of planning, communication and accountability to support authority to be devolved.

MANAGE AND PROTECT THE SPACE AND PROCESS

- Commit regular time and space to review new ways of working and share learning to enable adaption and evolution.
- Accept that you won’t get it right first time, the process is iterative.
- Make a commitment to learning and adapting as things evolve.
- Be willing to be comfortable with uncertainty.



DEVELOP LEADERSHIP CAPACITY

- If promotion and ‘vertical’ progression opportunities are limited, consider job enrichment. Are there opportunities to shadow, attend events or join networks to develop knowledge?
- Consider removing tasks or providing backfill when creating development opportunities – additional responsibilities should increase capacity and job satisfaction, not stress.
- Remember some people will step up more readily while others will need more help and support.
- Tailor capacity building approaches to different needs to help people feel more confident and comfortable stepping up.

DEVELOP DEVOLVED AUTHORITY

- Set up Learning and Improvement Groups with devolved authority to explore and progress key strategic areas of work. Involve people from a diagonal cross-slice of the organisation (i.e. hierarchical, geographic or functional). [Contact us for examples or support]
- Take a non-hierarchical approach to these and other opportunities. Leave job titles at the door to help people feel their perspectives have equal value.
- Share ownership of the organisation’s work, encouraging people to take the lead and come up with solutions.
- Create separate space for testing out new ideas outside of the usual operational rules and hierarchy.
- Working in this way can feel challenging at first, so developing shared groundrules and expectations helps to build trusting openness and respect.

“Having members from across the organisation, without rank, ensured people felt their ideas and viewpoints were valued. It is important for every staff member to remember that they are part of the organisation, no one person is more important than the other.”

PROVIDE CLEAR COMMISSIONING AND OVERSIGHT

- Use a ‘commissioning’ process when delegating key areas of work – set clear expectations, timescales, oversight and lines of communication.
- The same process used for commissioning external consultancy can apply to devolved working and decision-making in organisations. Outline the scope and scale of the work, arrange regular check-ins, and, importantly, give a degree of latitude for the delivery of the end result.

EXAMPLES OF GOOD PRACTICE FROM LASTING DIFFERENCE RESEARCH:

- Devolving strategic planning to working groups made up of staff and trustees, who consult widely on what emerges before analysing results and presenting recommendations to the board.
- Setting up working groups to take responsibility for implementing different strands of a strategic plan.
- Providing facilitation for lateral leadership groups and processes – and creating an exit plan to work towards self-facilitation once capacity to lead the process has been built.
- Supporting staff, volunteers or service users to organise and run conferences, workshops and events, e.g. showcasing or consulting on what matters to them.





SELF-ASSESSMENT: LATERAL LEADERSHIP

Note: these indicators are worded to prompt individual reflection but can be adapted for organisational analysis, or as part of a 360° feedback process, e.g. 'Managers trust other people to step up'. 'Leaders are present in the right ways, to the right extent, at the right times'. NB If using the suggested scoring guide, reverse the scores for Indicators 5 and 6.

2 = We have good consistent evidence | 1 = Our evidence is mixed or patchy | 0 = We cannot evidence this

There is also space for you to make notes and comments, for example if you are discussing the indicators with colleagues or reviewing progress over time. These notes will often be more meaningful than just a score.



	LATERAL LEADERSHIP	SCORE	YOUR NOTES
1	I trust other people to step up – and trust myself to step back.		
2	I am present in the right ways, to the right extent, at the right times.		
3	Having developed clear outcomes and expectations for pieces of delegated work, I get out the way.		
4	I am comfortable with uncertainty and help my team to be too.		
5	My role or identity would be at risk if I shared my power and responsibilities.		
6	My instinct is to hold onto and protect the things I do. I am afraid of what happens if other people get the power / decisions.		

THE FOUR CAPABILITIES:

ATTRACTING THE NEXT GENERATION OF LEADERS

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ATTRACTING THE NEXT GENERATION OF LEADERS

THE CHALLENGE

For *emerging* leaders, the absence of a well-defined career pathway can make joining the sector less attractive. Opportunities for progression are unclear and entry-level leadership roles are scarce. Alongside this, organisations struggle with funding constraints, short-term contracts and filling vacant posts.

For *existing* leaders, taking time for self-care, mentoring and professional development are key challenges to sustaining leadership capacity. Senior leaders' colleagues and families often say they wouldn't want to do their jobs, with all their responsibilities and challenges. Leaders are viewed as living and breathing their work, always being switched on. Who would choose this life for themselves? These levels of stress and uncertainty have led to more senior leaders moving on⁸, and the sector is losing experience and talent. Moreover, whilst there are a range of supports for CEOs, middle managers have fewer opportunities for networking and development.

THE CAPABILITY

Making the sector attractive to emerging leaders is key to future leadership sustainability. Younger people and those from outside the sector do want to be involved but creating more opportunities for entry and progression is vital.

PRINCIPLES

A sector attractive to future leaders

The conditions for doing our best work are already known and are possible to create in our organisations. But first we must give ourselves, and our teams, permission to break the cycle of constant stress and busyness. While the adrenaline and stress of leadership can seem heroic for a time, in the long run it leads to exhaustion and it won't encourage new leaders to join the sector or younger leaders to emerge.

8 Path to Impact – Final Report, ACOSVO and CO³, 2018.



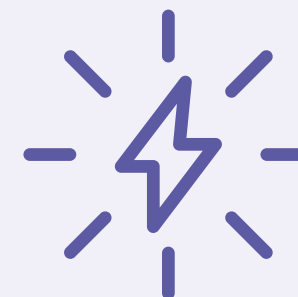
PROVOCATION:

HOW DO YOU CREATE THE SECTOR YOU WANT TO BE PART OF?

“We need to present the sector as an innovative, attractive and rewarding place to work. And to attract new people we need to stop talking to ourselves and start using different forums and networks.”



RECRUITING YOUNGER LEADERS AND THOSE FROM BEYOND THE VOLUNTARY SECTOR CAN BRING FRESH INSIGHTS, ENERGY AND QUESTIONS



The benefit of fresh perspectives

The world is becoming increasingly complex, requiring adaptive responses to multifaceted challenges. Recruiting younger leaders and those from beyond the voluntary sector can bring fresh insights, energy and questions, shaking things up positively. Sustaining leadership means shifting the focus from organisational survival to reviewing what skills, knowledge and experience are needed to respond to the emerging environment.

Changing the narrative

There is a prevailing narrative that the non-profit sector is 'well-meaning', underpaid and overworked. And whilst resource and demand challenges do of course exist this is only part of the story. The sector is a hugely innovative, professional and rewarding place to work, full of great employers. The narrative can be changed to better share this story and attract people who are inspired by the possibilities of making a difference.

Collaborative/systems leadership

The sector is sometimes described as competitive, with organisations competing for scarce resources. However, collective action happens frequently and is enriching. There is a resurgence in collaborative leadership, helping sector leaders to achieve more than they could alone. It's not always easy, but leading with shared values and joint aims, helps to shape the wider systems in which organisations make a difference to the lives of people, communities and society. Collaborative, systemic leadership requires time, trust, openness, honesty and diplomacy. This is not straightforward, but because it helps sustain leaders, organisations, and the impact they make, it is worth striving for.

The legitimacy of self-care

We need to legitimise and talk about the essential nature of self-care and development – it is not a perk. The funding and policy environment could create opportunities to increase leadership sustainability. However, unrealistic funding and management practices currently put unsustainable pressures on leaders and organisations. Commitment to, and investment in, self-care, learning and sustainable employment practices would greatly enhance the wellbeing and development of sector leaders.



ATTRACTING THE NEXT
GENERATION OF LEADERS

PRACTICES: IDEAS FOR ACTION

DIVERSIFY ENTRY OPPORTUNITIES AND PATHWAYS

- When recruiting, cast the net wide and go beyond traditional recruitment methods. For example, use social media, your supporter networks or advertise posts through channels that reach wider audiences, such as equalities networks and publications that reach underrepresented groups.
- Develop routes into your organisation, such as student placements, internships and project-focused work to help emerging leaders access opportunities and gain experience.
- Send out a clear message that your organisation is a place where a diverse range of people belong – and grow.

INVEST IN DEVELOPMENT AND PROGRESSION

- Ask your team what progression would look like for them. New ideas and ways of approaching learning and development can emerge from identifying and supporting aspirations.
- Share learning and resources with others in the sector. It is likely that other organisations are thinking about and working on these ideas too. Working together can increase the range of what is available – and affordable. [Contact us about joining our Lasting Difference symbol holders network].
- Explore and use support networks that already exist – membership organisations, funders and others provide development and peer support opportunities.
- Mentor new and emerging leaders. Consider cross-mentoring, which allows senior leaders to learn from and about junior colleagues.

WHEN RECRUITING, CAST THE NET WIDE AND GO BEYOND TRADITIONAL RECRUITMENT METHODS



COLLECTIVELY INFLUENCE

- Engage with funders in actively encouraging development and learning opportunities as part of their funding programmes.
- Develop a collective response about the importance of resources for self-care, learning and development to support sustainable leadership. Membership organisations and sector bodies can help.

PRIORITISE SELF-CARE

- Give yourself permission for self-care and be a role model for work/life balance.
- Ensure teams feel they have permission to do the same and don't internalise the pressure to always do more. Words alone are not enough.
- Work less and develop more interests outside of work – there is good evidence that this increases productivity and creativity.
- Could working your contracted hours, compressing your hours, shortening your working week or job-sharing your role help?

EXAMPLES OF GOOD PRACTICE FROM LASTING DIFFERENCE RESEARCH:

- Volunteer leadership programmes.
- Mentoring programmes for under-represented groups.
- Leadership exchanges with organisations in other sectors.
- Supporting younger people, those with lived experience or volunteers to prepare for leadership and governance opportunities, e.g. developing user-group committees, so that when board vacancies arise people can make informed decisions about stepping up.
- Staff volunteering programmes, allowing them to develop new skills and interests in work time, for example as trustees with other charities.
- Joining formal and informal networks for connecting with peers for support, sharing of ideas and challenges.
- Promoting wellbeing by providing gym memberships, employee assistance programmes and participating in workplace wellbeing initiatives (e.g. active travel and healthy working schemes⁹).

⁹ For example: Healthy Working Lives (NHS Health Scotland); Workplace Travel Challenge (Sustrans); Walk At Work Award (Paths for All); Active Leadership (ACOSVO)

Q SELF-ASSESSMENT: ATTRACTING THE NEXT GENERATION OF LEADERS

The self-assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence | 1 = Our evidence is mixed or patchy | 0 = We cannot evidence this

However, there is also space for you to make notes and comments, for example if you are discussing the indicators with colleagues or reviewing progress over time. These notes will often be more meaningful than just a score.

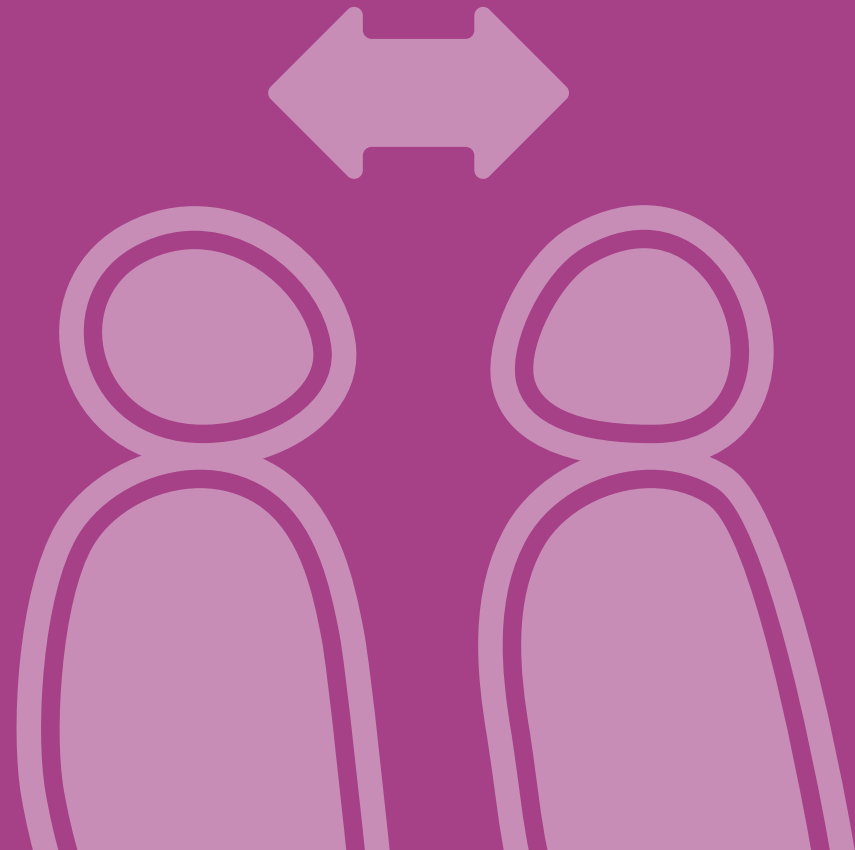


	ATTRACTING THE NEXT GENERATION OF LEADERS	SCORE	YOUR NOTES
1	Roles and recruitment processes are designed to attract emerging leaders.		
2	A range of routes into the organisation are developed, e.g. internships, exchanges and student placements to attract younger leaders.		
3	Learning and development opportunities are prioritised, and time and resources are invested to develop leadership capacity.		
4	Opportunities for learning and peer support within new and existing networks are explored and encouraged.		
5	Self-care is seen as a priority and everyone in the organisation is actively encouraged to have a healthy work/life balance.		
6	Challenges are shared with key stakeholders to advocate for policies and practices that support sustainable leadership.		

THE FOUR CAPABILITIES:

LEADERSHIP AS AN EQUALITIES ISSUE

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LEADERSHIP AS AN EQUALITIES ISSUE

THE CHALLENGE

Managing everyday prejudice is so energy-sapping that people learn to put up with it. ‘Imposter syndrome’ leads to people questioning themselves, rather than the way they are treated. The non-profit workforce is two thirds women¹⁰, but there is an under-representation of women in governance roles and leadership positions – particularly in the largest charities¹¹. Intersectionality means that these barriers are compounded for some people and groups.

THE CAPABILITY

Addressing inequalities requires focused attention and sustained action if leadership in the sector is to be truly equal and diverse. Organisations don’t set out to exclude potential leaders, but good intentions aren’t enough, they must be followed through into action. Sustainable leadership requires organisations and leaders advocating for change, assigning resources and taking accountability for results.



PRINCIPLES

People shouldn’t experience the effects of prejudice and inequality in the workplace

One day soon, we may look back on practices that are considered normal and be appalled at what was acceptable in early 21st century third sector workplaces. It’s not acceptable to offer women the ‘opportunity’ to reduce working hours after getting married, or to expect female CEOs to minute (or cater for!) board meetings. People from BME backgrounds shouldn’t have to anglicise their names to be recruited and accepted. People shouldn’t have their decisions questioned, be spoken over, ignored or passed over for leadership opportunities because they don’t fit stereotyped views of what a leader is.

“It’s time to dispel the notion of “invisible women” at work.”

¹⁰ State of the Sector 2018, SCVO

¹¹ Gender balance of top charity chief executives lags behind wider sector, Civil Society News, 2017



PROVOCATION:

LEADERSHIP IS A FEMINIST ISSUE. IN A SECTOR COMMITTED TO SOCIAL JUSTICE BUT WHICH DOES NOT REFLECT OUR SOCIETY, LEADERSHIP IS AN EQUALITY ISSUE.

“Organisational unconscious bias is energy sapping.”

“Who can afford to subsidise their work for a charity?”



Work and leadership opportunities should be inclusive for everyone

Funding constraints and short-term posts mean that non-profit organisations can be over-represented by people who can afford their job to be a second household income, or who can tolerate low wages and short-term employment contracts. Recognising and addressing these structural and funding challenges is key to ensuring equality of access to the sector, and to leadership roles. The sector, and organisations within it, need to be reflective of the communities and issues they serve.

Gender matters

In a sector where two-thirds of the workforce are women, gendered policy and practice are essential. Whilst charities in Scotland are doing better than the rest of the UK, seven in ten charities in Scotland still have pay gaps in favour of men¹² – and 64% of UK charity trustees are men¹³. Alongside this, menopause, menstruation, pre- and post-natal transitions need to be acknowledged and normalised to ensure women can continue to progress and contribute at their best. Caring responsibilities are also a key consideration, with women far more likely to care for (and need time off to look after) children or relatives¹⁴. Addressing gender inequalities and seeing leadership through a gender lens is critical to sustainable leadership in the non-profit sector.

“I’ll sit at my desk and blow my nose, but I’ll hide a tampon up my sleeve on the way to the toilet.”

Existing power structures need to change

Existing power structures inhibit the development of diverse leadership and affect leadership sustainability¹⁵. Sustained attention on equality and diversity is required if organisational policies, practices and expectations are to be more accessible and attractive to those who are currently under-represented in leadership roles. To attract underrepresented leaders and improve equality, we need to examine our organisational structures and processes through an equality lens. It is likely that they are currently, if unconsciously, inhibiting the recruitment, retention and progression of diverse leadership.

¹² Gender pay gap of Scottish third sector, SCVO, 2018

¹³ Taken on Trust, The Charity Commission, Cass Business School and Worshipful Company of Management Consultants, 2017.

¹⁴ Women more likely to take a career break for caring responsibilities, HR Magazine, 2019

¹⁵ Charities need to change how they value diversity, Civil Society News, 2019



The traditional image of leadership skews perceptions of what – and who – effective leaders are

This pervasive way of thinking presents some people as natural leaders. Usually, high profile, ‘charismatic’, powerful people (typically white men) are presented as the model that others should follow. However, definitions of leadership have evolved. People can be effective leaders without possessing any of these traits (and traits alone won’t make us good leaders). So over time, the focus of leadership shifted from personality traits to behaviours that can be learned and styles that can be adopted. But the style that works in one situation or organisation won’t work in another. So good leadership should be understood in terms of the context and situation in which it takes place. We need to redefine our images of what leadership looks like in non-profit organisations.

The way leadership roles are defined influences who will apply for them – and who will be considered

Roles should be designed in ways that make them attractive to a diverse range of people. Women are less likely to apply for jobs where they don’t meet all the criteria than men¹⁶, and are less likely to negotiate favourable terms post-appointment¹⁷. Moreover, board recruitment often seeks those who have extensive experience, access to influential networks and free time to give. This limits access and leads to board membership being dominated by older, highly educated, well-connected and more affluent people (often older, white, middle class men). Those who are younger or who have less access to opportunities, resources and influence are therefore often excluded.

¹⁶ Gender Insights Report: How women find jobs differently, LinkedIn Talent Blog, 2019

¹⁷ Babcock, L., & Laschever, S. (2008). *Women don’t ask: Negotiation and the gender divide*. Princeton University Press.

GOOD LEADERSHIP SHOULD BE UNDERSTOOD IN TERMS OF THE CONTEXT AND SITUATION IN WHICH IT TAKES PLACE





PRACTICES: IDEAS FOR ACTION

DEVELOP EQUALITY AND DIVERSITY-FOCUSED POLICIES

- Create leadership and organisational policies that comply with legal requirements (e.g. the Equality Act (2010))¹⁸ as a minimum, and proactively promote equality of opportunity.
- Review development and leadership policies and opportunities to make sure they are accessible to all and don't include unconscious biases.
- Seek the support of organisations who have expertise in equality and diversity to understand barriers to access and develop policies that are inclusive to all.
- Use external diversity standards¹⁹ (such as **50/50 by 2020**, the **LGBT Charter**, **Disability Confident** and **Carer Positive**) to review and improve practice. Publish your results, making your commitment to inclusion visible to all.

ENSURE REPRESENTATION

- Appoint an equality representative or group to raise issues and represent otherwise marginalised views.
- Monitor the diversity of staff, trustee and volunteer applications and appointments. Compare results with relevant demographic data and take action to ensure fairness, equality and representation.
- Ensure interview panels are diverse and representative of the workforce and wider community.
- Challenge the assumption that BME leaders should only manage BME organisations. Some BME leaders report being typecast by institutional or structural racism.

TAKE A GENDERED APPROACH TO POLICY AND PRACTICE DEVELOPMENT

- Create and contribute to an environment where the effects of menopause, menstruation, maternity and post-natal issues are discussed, understood and normalised, not hidden.

¹⁸ Prevent discrimination: Support equality, ACAS, 2018

¹⁹ 50:50 by 2020 (Scottish Government); LGBT Charter (LGBT Youth Scotland); Disability Confident (UK Government); Carer Positive (Carers Scotland); UK Workplace Equality Index (Stonewall)



- Develop policies or guidance that recognise and respond to identified needs.
- Provide training for line managers to ensure women are supported through maternity transition, menstruation or menopausal symptoms.
- Flexible working, including compressed hours, shorter working days/weeks, working from home and the better use of technology can all help too.

ADDRESS EQUALITIES IN GOVERNANCE

- Facilitate board discussion about their diversity so that questions and misunderstandings about tokenism and representation do not hold them back from making change.
- Provide voluntary trustees with the same requirement and access to training on equality and diversity that the workforce has.
- Conduct audits of board skills and diversity. When discussing board diversity, the critical principle is ensuring they reflect the society their organisation exists to serve.

ENCOURAGE AND VALUE DIFFERENT EXPERIENCES AND PERSPECTIVES

- Review leadership and progression opportunities to ensure they are inclusive, equitable and accessible to all.
- Facilitate more diverse conversations and contributions in your organisation – involve everyone in creating equitable work policies and practices.
- Seek and value different perspectives and experiences. Encourage disclosure (e.g. of disabilities, gender and sexuality) by creating a safe, trusting environment with supportive supervision arrangements.
- Consider your views on the place of feminism and equalities in the workplace. How much can people be themselves – and live their values at work? Or how much do they have to conform and ‘leave themselves at the door’?

EXAMPLES OF GOOD PRACTICE FROM LASTING DIFFERENCE RESEARCH:

- A board equality and diversity self-assessment which assesses equalities characteristics and diversity of background and outlook.
- Policies that support specific needs, such as menopause policies that recognise the need to support women in different ways at different times in their lives.
- Equalities and diversity awareness training and events, to keep knowledge up to date and enable open conversations.
- Gender inclusive toilets.
- Quiet spaces which can be used for prayer, breastfeeding, taking time out etc.
- Service users being involved in recruitment e.g. on interview panels or pre-interview tours.



SELF-ASSESSMENT: LEADERSHIP AS AN EQUALITIES ISSUE

The self-assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence | 1 = Our evidence is mixed or patchy | 0 = We cannot evidence this

However, there is also space for you to make notes and comments, for example if you are discussing the indicators with colleagues or reviewing progress over time. These notes will often be more meaningful than just a score.



	LEADERSHIP AS AN EQUALITIES ISSUE	SCORE	YOUR NOTES
1	Recruitment policies and procedures encourage and support equality and diversity in our organisation.		
2	Organisational policies reflect the needs of our workforce (such as flexible working, menopause policies, etc).		
3	Advice and support are sought from organisations who have expertise in equality and diversity to ensure our policies and practices are inclusive and equitable.		
4	Open and honest conversations are encouraged to understand any barriers to work and progression experienced by people in our team.		
5	People are able to be themselves at work and feel a sense of belonging and ownership.		
6	Managers, staff and trustees undertake equality and diversity training to keep knowledge and skills up to date.		

NOTES AND REFLECTIONS



ACTION PLANNING

SUSTAINABLE LEADERSHIP ACTION PLAN				
CAPABILITY Priority area/s of development*:	ORGANISATIONAL ACTION What does the organisation need to do?	INDIVIDUAL ACTION What do I need to do?	TIMESCALES When will it be done?	REVIEW When and how will progress be reviewed?

* Succession planning; Lateral leadership; Next generation; Equalities

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USEFUL WEBSITES

Active Leadership

www.acosvo.org.uk/active-leadership

Carer Positive

www.carerpositive.org

Close the Gap

www.closesthegap.org.uk

Engender

www.engender.org.uk

Equality and Human Rights Commission

www.equalityhumanrights.com/en

Healthy Working Lives

www.healthyworkinglives.scot

LGBT Youth Scotland

www.lgbtyouth.org.uk/lgbt-charter

Scottish Government One Scotland

onescotland.org/equality-themes/5050-by-2020

Stonewall

www.stonewall.org.uk/creating-inclusive-workplaces/workplace-equality-indices/uk-workplace-equality-index

UK Government

www.gov.uk/guidance/disability-confident-how-to-sign-up-to-the-employer-scheme

Walk At Work Award

www.walkatwork.scot

Workplace Travel Challenge

www.sustrans.org.uk/our-blog/projects/2019/uk-wide/workplace-travel-challenge

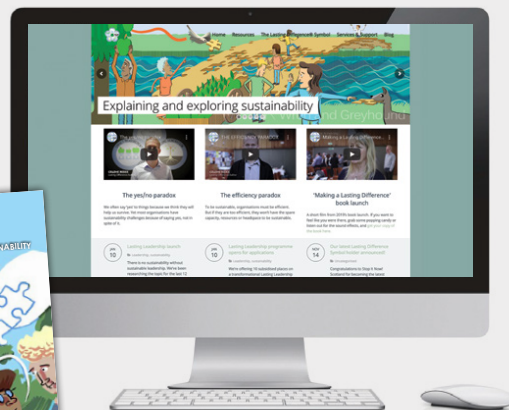
ABOUT WREN AND GREYHOUND

Wren and Greyhound are the creative management consultancy behind the popular suite of Lasting Difference resources. We provide a range of services to charities, social enterprises and public bodies, including:

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Making a Lasting Difference book

We wrote the book on non-profit sustainability.



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