

SUSTAINING CHANGE

Leadership
retreat 2023



**THE LASTING
DIFFERENCE**

Sustaining nonprofit organisations, leaders & impact

CONTENT

Welcome

Every two years we invite inspiring people and partners to join us for a tranquil three-day residential.

We share gifts and challenges in a relaxed, trusting environment. In the spirit of our 'Advance Retreats', very little content is agreed in advance. It emerges from the things we share.

This report presents the learning that comes from this. We hope it helps you to sustain inspiration and energy.

If you'd like more, our previous reports are here

[2017: Time and Space](#)

[2019 Lasting Leadership](#)

[The soundtrack is here](#), or you can click on song titles as they appear.

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Special guests

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Deborah Long, Scottish Environment LINK

Gillian Reid-McKee, Shelter Scotland

Khalida Hussain, Scottish Government

Leigh-Ann Little, The Oxygen Works

Luan Grugeon, Grampian Health Board

Mhairi Crawford, LGBT Youth Scotland

Moira Ann McCormick, Concrete Garden

Nick Addington, WM Grant Foundation

Ryan Currie, Reel Time Music

Sarah Van Putten, LifeCare

Shubhanna Hussain-Ahmed, Coalition of Carers in Scotland

Stuart Muirhead, Iriss

Wendy Bates, Health in Mind



This symbol takes you to external links



This one downloads one of our free guides

The Lasting Difference team shaping the event were Graeme and Jenny Reekie, Jen Curran.

Photos and quotes are from our guests. Cover: an intersectional tartan using an idea from LGBT Youth Scotland.

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THE CHALLENGE

Leading change while:

Keeping your values close

Listening to your gut about what's the right way to lead for you –
and your organisation.

Keeping leadership and management in balance

Bringing others with you

Soundtrack – Everything

holding onto
what makes you
GREAT

Holding onto what makes you great

Traditional management has its place, even in managing change. It can provide some certainty when organisational structures and processes change. It gives newly promoted people a framework to follow.

But traditional management doesn't align with many charities' values or the cultures they need for today's challenges:

- Shared leadership and accountability.
- Valuing people's contributions and investing in their development.
- Decision-making close to the point of delivery.
- Responsiveness to change.

Reflection

A key risk in most charities' risk registers is CEO succession. Make sure they are not the only ones who make certain decisions or knows how to do certain tasks.

↓ There's lots more on this in the Lasting Leadership guides to Succession and Lateral Leadership.

Whatever leadership approach you adopt, it's important for the whole leadership team to be on board—consistency counts.

Train managers, particularly in the soft skills of leadership

Work with them to develop a shared approach to leadership: your 'way'

When you develop a new strategic plan, revisit this – what does leadership need to look like now?

Bring managers together to talk about cross-organisational issues and external developments. What do you need to do together to drive the organisation's work forward?



There's never a good time for micro-management

Don't manage people's brilliance out of them.

Support people so they are better at supporting the people or issues you support.

Use succession planning to give people from different roles and backgrounds a taste of different responsibilities and progression opportunities.

Create an exit strategy for your own role to future-proof the organisation

Deputise and delegate to share the strain and reduce risk.

Enable lateral leadership.

**The opposite
of 'more'
is not 'less' ...
it's**

better.

Quote: Seth Godin





THE CHALLENGE

Leading change takes confidence in yourself to:

Be assertive

Have expertise

Not have all the answers

Be willing to learn

Not be led by money

Being **BRAVE**

Soundtrack: [The Apple Tree](#)

Being brave

Sowing seeds

Brave leaders, charities and funders invest in learning. Importantly, they are open to taking risks that help them to do this. They listen and respond to people and the wider environment but manage expectations - and make decisions - ethically.

Feeding the roots

Brave leaders build people's capacity. They remove barriers to people being heard - then listen. They are open to giving people the chance to try something different. They know that if people are told off after being brave once, they won't be brave again.



Thinning apples

It hurts to remove apples from the tree, but thinning the crop helps those that are left to thrive and grow. Whereas not thinning affects the quality of this year's harvest and the quantity of next year's. Brave leaders support others to let go of projects, people or pursuits that hold them back. They know the right thing to do is often the hardest.

Bearing fruit

Brave leaders and organisations stay the course. They know the fruit will come. They evaluate risks and weigh opportunities against this long-term outcome. They support colleagues, trustees and others to do the same.

Reflections

Are people and projects in your organisation united by a shared vision?

Do you have a good balance between planning and responsiveness?

Are learning and reflection embedded in everyday practice?

How do you navigate external pressures so you can work within capacity without compromising your values?



(From the Lasting Difference toolkit p29 'Improvement')

THE CHALLENGE

Lockdown stopped, the emergency stopped, but we didn't. We're working beyond capacity.

There are backlogs in most parts of the system. It's a very different world to the one in which we took on some of our contracts and commitments.

We need to stop for breath and develop individual, team and organisational resilience.



stop ping



for
BREATH

Stopping for breath

Soundtrack –Six Breaths

'We've lost two years in terms of consciously leading our organisations where they need to go. Where have we been? Where are we?'

Breathing space and capacity

For three years things have been in emergency mode. That's unsustainable. In the face of overwhelming demand and complexity, people resort to just doing something, anything. That's self-defeating.

Now is the time to draw a line and reset expectations about what normal capacity is.

If your baseline capacity is to work at 100%, you'll be at 130% before you know. There's no slack for when things go wrong. Reset your baseline:

- In the quiet moments, stop finding things to do.
- Take breaks without guilt.
- Ask others what you can do to alleviate their lack of capacity.
- Invest in development.

Taking a deep breath and saying no

People say yes to all sorts of things for all sorts of reasons, not always good ones. What if no-one else does this thing? What if someone does it, but they do it worse? Make better, more conscious decisions than this.

It's not just about saying yes or no, development or delivery. It can be both if they are in balance and we know how much of each is enough.

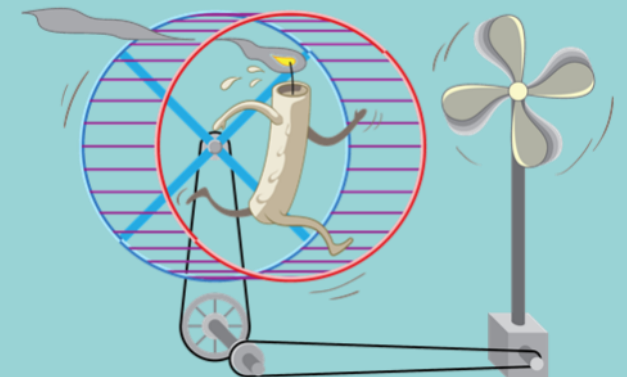
The only way you can do better is to stop trying to do more.

Breathing easily – team resilience

After years of uncertainty, teams and partners might want certainty. That's hard when we don't have the answers. But can we retain the uncertainty long enough to see what's going on and test what's going to work.

- Go to people who do the frontline work.
- Learn from them - what's their biggest thing right now?
- Give them attention, space, find out what needs to change structurally, culturally.
- Remove the barriers that get in people's way.
- Tell them and the world what a good job they're doing.

'Resilience and wellness aren't in people but between them. A problem shared...'

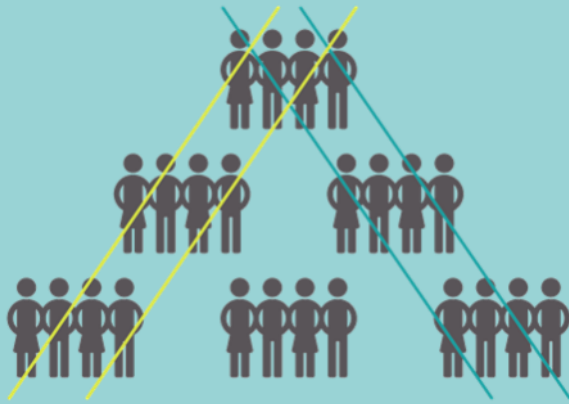


'Where do we want to go? We're just pushing ahead!'

Stopping for breath

continued

What we mean when we say resilience



Individual
supported by
team
supported by
organisation.



Download our guide to sustaining energy, focus and self care.

A breath of fresh air – wellbeing

In the nonprofit world, people will run the extra mile. But this should only be when needed, not all the time. These things help productivity and happiness:

Take time out

- Give people birthdays as an additional day off.
- Give explicit permission for short notice time off.
- Take an hour a day for wellbeing, something that fulfils you.
- Working at 80% capacity so other people work with spare capacity too.
- Provide two wellbeing days on top of annual leave each year, to be used how and when people want.
- Close the doors for a week's learning, development or wellbeing.
- Or block in a service week four times a year, to stop and do what you need to get done.
- Take people out of work to do something different like sharing skills.

'We pour ourselves into people and work but nobody pours into us.'

Face masks off – managing expectations

'The question isn't how we get back to the office but how do we interact now and in future in ways that suit people more?'

Only a short time ago people combined homeschooling, homeworking and coping with chaos. In those few years it feels there's a new generation in the workforce. Do you and they understand:

- How well their expectations translate into today's workplace?
- How you all work best?
- How to make flexible working fair to everybody?
- The rules and standards for flexible and hybrid delivery?
- What they lose and gain by returning to routines and face to face working?
- What's best for your services and for you as a team?

People can no longer be managed by focusing on time, tasks and turning up. Outputs and outcomes are the new conditions for the flexibility employers provide.

Stopping for breath

continued

Breathing new life into the organisation – lateral leadership

If we're exhausted, where does this come from? Is it from working 24/7? Or from people being let down by the system – having to do things sub-optimally, follow daft rules, and give back the autonomy and leadership they took in spring 2020?

If we want to free up creativity and capacity again:

- Give permission or seek support to 'Do what you need to do'.
- Empower staff by bringing them together on a common theme e.g. shaping policies on equalities, mental health and HR.
- Replace rules and decisions with guardrails and touchstones.
- Know which ones to break: see below.

Red and blue rules

Red rules (or Sharpie rules) are those that can't be broken – usually legal, safety or ethical requirements.

Blue rules (or pencil rules) relate to custom and practice. They are generally not written down, they're just what we've always done.

VUCA 2.0

VUCA stands for volatility, uncertainty, complexity and ambiguity – a way to describe the challenges we face.

For a practical, empowering activity, work with staff teams to list what's happening under each of these headings. Then reframe them all based on your power as a team to develop:

- Vision
- Understanding
- Courage
- Autonomy



[Source/further information](#)

Reflection

This workshop theme came up tentatively – was anyone else worried about the impact of the pandemic on our leaders and organisations? Has a stage in the grief cycle been missed through a collective desire to stop talking about Covid?

Services and people are breaking from trying to bring everyone through three years of crisis in one piece.

That's unrealistic. It can't be done.

But you can get back to your intention, being the leader you want to be.

Be cautious about talking in absolutes about everyone being exhausted. Everyone is different. There are people with energy to give, capable workforces everywhere.

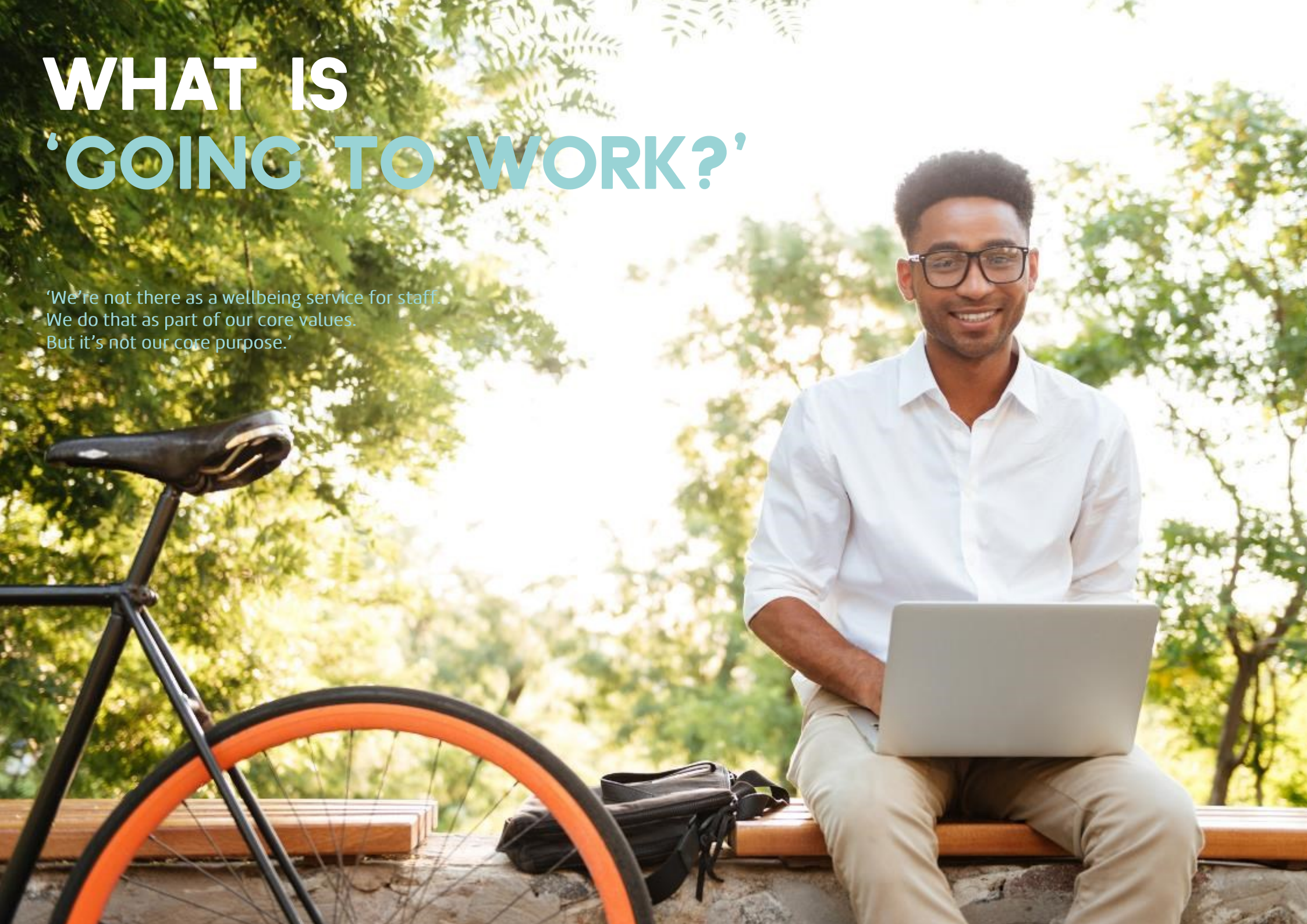
The key now is identifying the capacity and resources in the system and lining them up more effectively.



Download 'Managing Capacity' to start.

WHAT IS 'GOING TO WORK?'

'We're not there as a wellbeing service for staff.
We do that as part of our core values.
But it's not our core purpose.'



THE CHALLENGE

Voluntary and public sector leaders need one another but they don't always know how, or how to work together.

People in the voluntary sector often say that the public sector has all the power and the money.

People in the public sector often say their power and money are both limited.

They are all funded largely from the same pot, to achieve the same goals.

Soundtrack: Crosstown Traffic

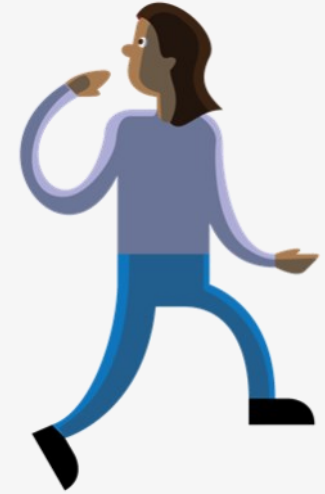


Cross-
boundary

leadership

Cross- boundary leadership

'The public sector can't do anything without the voluntary. Don't undersell yourself.'



Working with public sector partners— what works for voluntary sector leaders?

Understand public sector managers are motivated to do their best for people.

They are competent and caring *and* struggling with a system that has been underfunded for years.

They don't have much funding to give freely.

Build trust and relationships with key people. It takes time but it's worth the investment.

Public sector managers need the third sector but they don't always know how.

Find shared goals – you might call them different things, but they're the same outcomes.

Go in with curiosity, a willingness to adapt – an open mind not an agenda.

Don't assume how much power others have. Recognise your own.

- You are in a unique position to share perspectives from lived experience.
- You can help others to understand, showing solutions for the problems you all care about.
- You have the power to engage. To set and hold boundaries. If something is outwith your capacity, say no.

Be willing to work differently and take risks.

Know that things won't go exactly to plan – and that's okay.

Before getting into any detail about developing a partnership, involve staff and the people you work with.

'It's like knitting a jumper: involve people in choosing the wool, not trying it on when it's done.'

Cross-boundary leadership

continued

'The inarguable experience of our communities'



Leading system change

Policy organisations are often unsure of how to balance, prioritise or connect:

- National and local focus
- Policy and delivery

In reality you can only achieve your aims if there are credible links between these. The branches and the roots nourish each other.

Seeking to meet as much demand as possible leads to bad practice and culture, propping up a broken system rather than exposing it.

Most charities would find it impossible to meet all the demand for their services. But by working more systemically, the core issues can be addressed and more people can benefit.



Download [Shine a Light for more.](#)

Most charities would find it impossible to meet all the demand for their services.

But by working more systemically, the core issues can be addressed and more people can benefit.

- Focus on how to resolve the fundamental issues rather than seeking to meet all the demand.
- Think deeply about using your existing resources differently.
- Find better ways to gather and use intelligence (e.g. insights from communities, emerging trends).
- Empower colleagues to investigate the issues they're identifying and to report back on what they've done or learned.
- Make clear decisions about whether, when and how to intervene. Are you the best people to help? Can you influence change? Who else and what relationships are needed?



In this case study from [Shelter Scotland](#), find out how 'every story counts' in their fight for home. Each interaction tells the charity something about the system and what needs to change, whether policy, practice or culture.



THE CHALLENGE

You want to share your learning and experience more – but this might be taken as a sales pitch or just the voice of the CEO.

How do you share your experience authentically, speaking with and on behalf of the people you work with?

Talking with power and influence to those who have power and influence

Being vocal – but not shouty

Meaningful listening and response

Soundtrack: Give More Power to the People

power
influence
VOICE

Power influence voice

When sharing messages about your work it can sometimes feel like you're starting with your arms folded. If you open them instead, you can communicate the nuances and challenges you are uncovering.

If you get to the point, sharing recommendations and resources bravely, you can support wider change.

People will listen to you as a knowledge broker rather than as an opinion leader – you're not coming with an agenda. When you do, you do it clearly, 'This is our viewpoint'.

Otherwise, aim to speak with the voice of the people you work with, and to build people's confidence and skills to speak for themselves. This isn't about you or your funding. People get fed up telling their story for that. It's not about championing the organisation – it's about championing the cause or issue.

It's about a relationship-based approach to influencing – learning from and sharing with each other. Examples of this include a reverse-mentoring

 model in the NHS where both parties get something out of the relationship, and the [Human Library](#) approach.



Reflections

What are your red lines?

Are you really clear about what needs to change?

Are you and others clear on your goals and asks, and whose voice you are speaking with?

Who are your allies and what are your sources of influence?

Barriers to change – do you go through, around, over or under them?

Do you need a battering ram or a doorbell?

Over: ways people have found to use their voices

I hate when people say
'What is your elevator pitch?'
It's not a sales pitch.
It's a story we need to tell.

Power influence voice

continued

Ways to have a voice, authentically:

Being clear on what it is you want to bring into the light – and why.

Knowing the ask or the change you'd like to see. Does it meet your strategic intent?

Making films with people to get their messages across.

Using board members' influence.

Remembering there are lots of good politicians and people in power.

Connecting people in power to the real life circumstances people are experiencing: 'Better felt than tell't'.

Saying no to requests for information or visits that aren't a priority or part of your strategic intent, and charging for your time when you do. These have to be two-way, reciprocal relationships – what's in it for you?

Using stakeholder analysis to understand where the power and influence are.



The [power / interest matrix](#) is good for targeting your limited time.

My place in the orchestra



THE CHALLENGE

During the pandemic everyone had joined up voices. Everyone played the same song – let's all keep people safe. Silos came down, permissions were given.

Everyone had roles to play and contributions to make, wherever we were in the system. Like an orchestra in harmony.

As time passed though, resources became scarcer. Competition returned. Some organisations and communities don't feel able to use their voice. Others get lost in the cacophony. No-one listens to that.

Soundtrack: Here Comes the Sun

" AN ORCHESTRA IS A PERFECT EXAMPLE OF THE IDEAL SOCIETY.
EACH SECTION, THOUGH DISTINCT, IS FUNDAMENTAL.
EACH SECTION IS PART OF THAT WONDER OF BEING TOGETHER
AND ACKNOWLEDGING THE RESPONSIBILITY FOR OTHERS.
I NEVER TIRE OF SAYING THIS : YOU DONT PLAY BETTER
IN ORDER TO UNDERMINE YOUR NEIGHBOUR ; YOU PLAY
BETTER SO THAT THEY WILL PLAY BETTER. WE ARE PROUD
OF EVERYONE WHO PLAYS WELL. THIS IS HOW AN IDEAL
SOCIETY SHOULD FUNCTION WITHOUT THE SHORTCOMINGS
AND FLAWS OF OUR PRESENT STATE. "

Ezio Bosso

My place in the orchestra

'Once they're up against it, organisations work together.'

A little bit of soul

The beauty of the third sector is the ability to see the human side of systems, connecting communities with decision-makers, telling the stories, bringing the expertise, giving the data soul. Collaborating. Taking a relationship-based approach to changing things, finding the connections, human to human.

The system is people: orchestra, audience, ushers, conductor, everyone.

When you invest in people's capacity, voices get heard. Stories cross silos.

Stories and songs change with every recital, adapting for different audiences. Recording them means they get heard more, without exhausting the singer.

Do:

- Look out for and name power dynamics and inequality
- Say 'civil servant' not 'government'
- Talk from the heart and soul
- Ask others to do the same.

Get over the blues

Charities need to stop singing the 'No money, no capacity, nobody loves us blues'. Negativity is draining. It feeds no-one but itself.

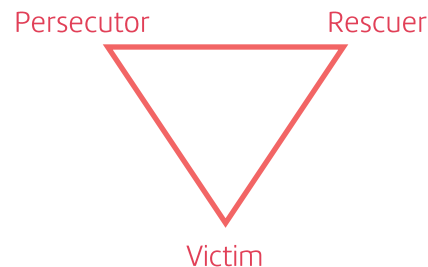
Work with others to find solutions. Change how people view you and the systemic challenges you share.

'The shoutiness isn't noted in the minutes, but the point and action coming from it is.'



Step back from the [drama triangle](#)

Think about the roles you play and those you require of others.



Good relationships are rooted in having done a good thing together. Trust and loyalty build up over time.

Start with low-risk, one-off transactions before moving onto longer-term, higher-risk partnerships.

My place in the orchestra

continued

Bang the drum, keep time

Having a strong, representative voice gives credence and clarity, lending confidence when you say, 'We know this.'

Enlightened audiences are ready for and want this type of evidence and engagement. With others, persistence and pacing are needed:

- Sustain urgency but remember where you're going.
- Keep the long-term dream alive.
- Stay practical – progress is sometimes enough.
- Show the negative impact of short-term thinking like policy cycles and terms of political office.

Know the score

Lots of organisations focus on policy influence. That's not enough.

- Many policy wins are already in place but implementation gaps persist
- Policy makers may agree to your recommendations and simply delegate them back to you. 'Okay, so what will you do now?'
- New policies get referenced for a while but nothing fundamentally changes before the next one comes along.

Show civil servants what collaboration and cocreation really mean. Consider whether it really is a policy win that you want and whether you should be focusing on influencing other organisations or communities instead.

Pay the price of admission

Some charities worry about biting the hand that feeds them. Others are accused of being too cosy with governments. That's the balance inherent in being a critical friend.

Policy work is a two-way investment. What return do other people get for investing in you? What's the value you bring? What return do *you* get for the time and expertise you put in?

Diversify your portfolio, spreading risk and opportunities across the short, medium and long term:

Short term: What's the immediate, urgent focus? Are there red lines about what you will and won't accept? Which specific policy makers or politicians will give the best long-term return on investment?

Medium term: What signs of progress will you look for? What are likely to be your next priorities? How much of your time will go into these?

Long term: What will success look like? How will your messages be reflected across different policies – or government departments? Will there be a financial element to this, like influencing the funding and commissioning environment?



Open Government commitments are made for transparent, open, collaborative approaches to policy design and roll out. Remind civil servants of these:

Scotland: gov.scot/collections/open-government-documents/

UK: opengovernment.org.uk/

International: opengovpartnership.org/

My place in the orchestra

continued

Singing from the same hymn sheet

Sustainable organisations and movements generate a stronger voice when they collaborate. They resist competition and negativity. They are pulled together by adversity, not apart.

People and partners need to see what's in it for them – and to see themselves reflected in the specific issues being addressed or tactics being used.

*'Joined up where we can be,
separate when we need to be.'*



Examples

A group of LGBT organisations speaks with a unified voice, grounded in evidence. Clear agreement on shared messages and tactics (and individual roles) increases each partner's power and influence. Example: [The LGBTI Equality Manifesto](#).

[Scottish Environment Link](#) ensures diverse voices are heard in government consultations, bringing members together to be a stronger and clearer voice for the environment through joint campaigning, agreeing common lines and coordinating messaging.

[The National Carer Organisations](#) come together because they know that will deliver more for carers. Sharing knowledge and focusing their collective effort helps them listen to carers and reflect their views e.g. in national consultation responses.

[Volunteering for All](#), the national framework for volunteering cost nothing more than the time to come together as partners. Although it's a Scottish Government publication, the framework and implementation plan were developed by partner organisations.

Reprise

The system is made of people. People move on. You might need to start again with building awareness, relationships and capacity. How will you stay energised to pick yourself up and go again?

Who conducts the orchestra? Do you bring people and parts of the system together?

How is harmony achieved from the different instruments that people use and the scores that they follow?

Improvisation can be liberating for all. How will you sustain the open-minded, responsive, non-hierarchical ways you found during the pandemic?

Is what you say the same as what people hear?

Is your time better spent teaching
the voice to sing or the ears to hear?

“My parents told me not to touch the kettle as it would burn.
So I licked it instead!
It hurt but I learned.

Sometimes we just need to lick the kettle.”



Final reflections

Soundtrack: You Set the Scene

THE CHALLENGE

Summing up a life-changing experience!

Stay human

When bringing change into the world, humanity is our starting point. It's about human beings – starting conversations and building relationships.

You are human too – recognise your limitations. Bring people with you – it's okay to bring others in to help. Remember why you're doing this.

Recognise your privileges. They come with a responsibility.

When you interact with a system you affect it. Interact with the system in a positive way – use your power and influence with a smile on your face. Name them and use them.

Nobody tries to do a bad job, but watchout for arseholes.

People generally turn up to work to do a good job, but some people are just arseholes—and that's okay. People who want the limelight – centring things on themselves not the cause. Don't call out the person – call out the issue / problem – and be part of the solution.

Organisations don't need to be here forever.

Strategy isn't about a pre-determined future but exploring how we'll deal with uncertainty. This is a key talent for us as leaders. Risk and uncertainty are two different things.

We have what we need – it's what we do with it.

We can't meet all the demand there will be for our work. But the narrative can change from one of scarcity to the massive skills, knowledge, resources and money in the sector.

*'How do you do it?' said night
'How do you wake and shine?'
'I keep it simple' said light
'One day at a time'*

Lemm Sissay

'It is not that we have a short space of time, but that we waste much of it. Life is long enough, and it has been given in sufficiently generous measure to allow the accomplishment of the very greatest things if the whole of it is well invested.'

Seneca, On the Shortness of Life



Appreciation



'It's given me so many answers to questions I hadn't even got to yet! The space, discussions, challenge and people have opened the floodgates to ideas - backed up with reassurance.'

'Made me feel we can all be the change we want to see and play a role in dismantling and rebuilding the system to make it better for ourselves and communities.'

'Transformed me as an individual, professionally and personally. It was affirming, it challenged me, allowed me to pause for breath. It opened my mind. Encouraged me to look at challenges and opportunities in new ways.'

'Complete highlight of my year/career - and a unique experience for me professionally.'

'Quiet and powerful love.'

'Such a special experience - a privilege to be with such interesting and inspiring people. It also provided the opportunity to reset my focus. I came away feeling energised, motivated and excited about the future.'

'Amazing retreat. I had a wonderful experience with fantastic people who I learnt so much from. The planning, structure, thoughtfulness behind everything was just magical.'

'My north star is my values - this has reminded me of that. It has been so good for the soul.'

'I have been forever changed by the shared experience that we were all privileged to enjoy. It is truly remarkable that within a matter of hours, a group of complete strangers would soon feel like long lost friends.'

'It was hard to know what to expect but at the same time my experience exceeded all possible expectations. I am inspired and energised from the conversations. I will never forget this weekend and its legacy will live on.'

'I am just in awe of the special space that you shape for us all.'

'Profound for me in more ways than one. Setting aside for now the sustainable leadership aspects (which were sizeable in themselves), I came away feeling reconnected with my own sense of creative expression.'

'Being around others so openly passionate and compassionate, caring and giving of themselves, was a hugely powerful experience. For the first time, I was with a group of leaders and I didn't view myself as lacking or wanting to emulate them. I was supported to see my own gifts, learning so much without feeling as though the learning was filling some kind of deficit in me.'

'It was fantastic, really relaxed, met some amazing people and the programme was flexible which was great. The venue was just perfect and really liked the facilitation style. I came away feeling energised and connected to some inspirational people working towards improving the lives of people marginalised in society.'

We are the creative management consultancy behind the popular suite of Lasting Difference and Lasting Leadership resources. Our mission is to contribute to strong, sustainable, well-run nonprofit organisations led by confident, informed, capable leaders using these resources and others:



Organisational sustainability

Lasting Difference toolkit, workshops, e-learning, conferences and consultancy, sustaining organisations with effective guides and strategies for:

- Involvement
- Income generation
- Impact measurement
- Innovation and improvement
- Managing capacity



Leadership sustainability

Inspiring guides, workshops, e-learning and leadership development programmes on:

- Lateral leadership
- Succession, knowledge management
- Energy, focus, self-care
- Equalities
- Sustainable governance



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