

LASTING LEADERSHIP

GUIDE TO...

LATERAL LEADERSHIP

Sustainable leadership in non-profit organisations



LASTING LEADERSHIP

GUIDE TO...

SUCCESSION PLANNING AND KNOWLEDGE MANAGEMENT

Sustainable leadership in non-profit organisations



LASTING LEADERSHIP

GUIDE TO...

SUSTAINING ENERGY, FOCUS AND SELF-CARE

Sustainable leadership in non-profit organisations



LASTING LEADERSHIP

GUIDE TO...

EQUALITIES

Sustainable leadership in non-profit organisations



There is no organisational sustainability without sustainable leadership.



PART ONE: BACKGROUND AND CHALLENGES

BACKGROUND

6

CHALLENGES AND PARADOXES

7





The Time Challenge

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

Our time is limited.

More time on one thing = less time on something else.

Invest time, don't spend it!

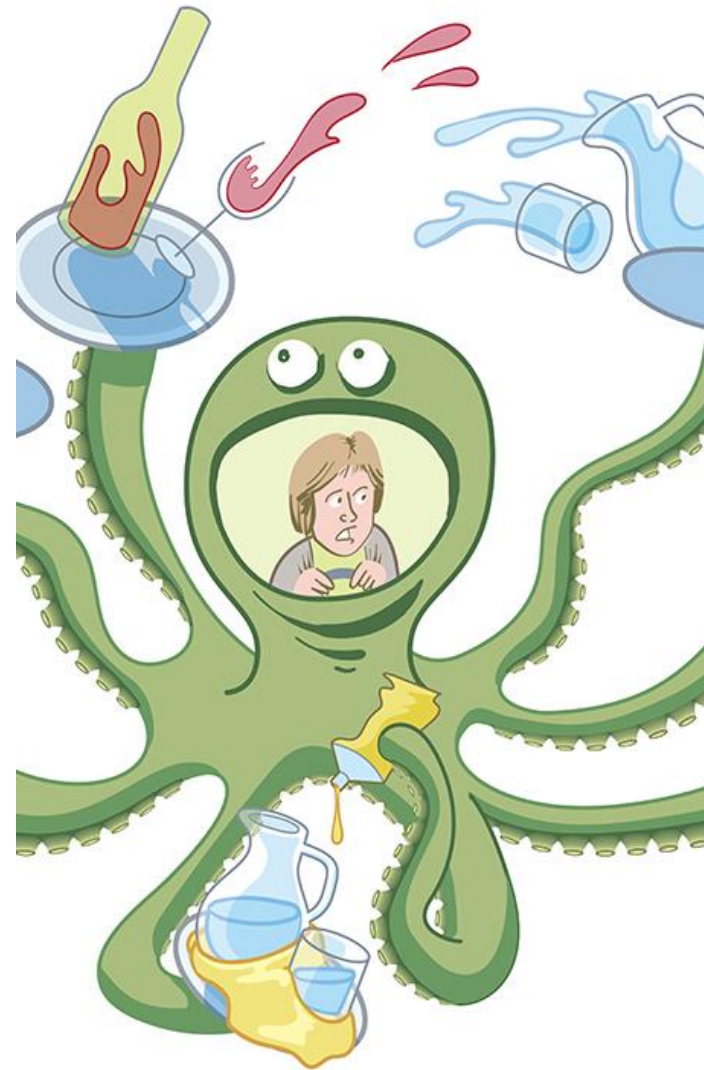
The Leadership Myth

Leadership gets fetishized - the exhausting reality gets ignored.

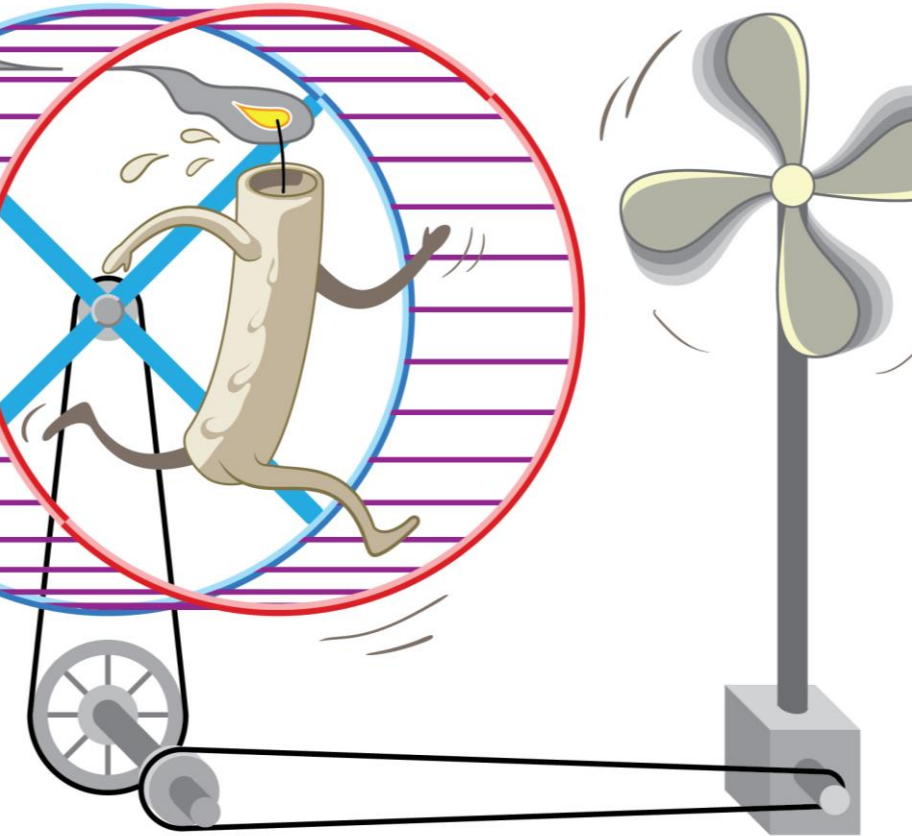
Create opportunities to focus on your vision and purpose.

Firefighting is not a strategy.

Avoid being the human octopus!



The Care Paradox



*Caring organisations
don't always care for
themselves.*

Look after yourself and
the people around you.

Role modelling – words
alone are not enough.

Prioritise self-care as an
essential!

The Control Paradox

The more we try to control,
the more resistance we
face.

Know when to let go.

Delegate authority.

Build systems and
processes to support
devolved leadership.



The Trust Paradox



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

Invest in capacity.

Delegate and develop.

Build trust.

Step back.

The Equality Paradox

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

Organisations and their leadership need to reflect the communities and issues they serve.

Work and workplaces are designed in ways that exclude people.

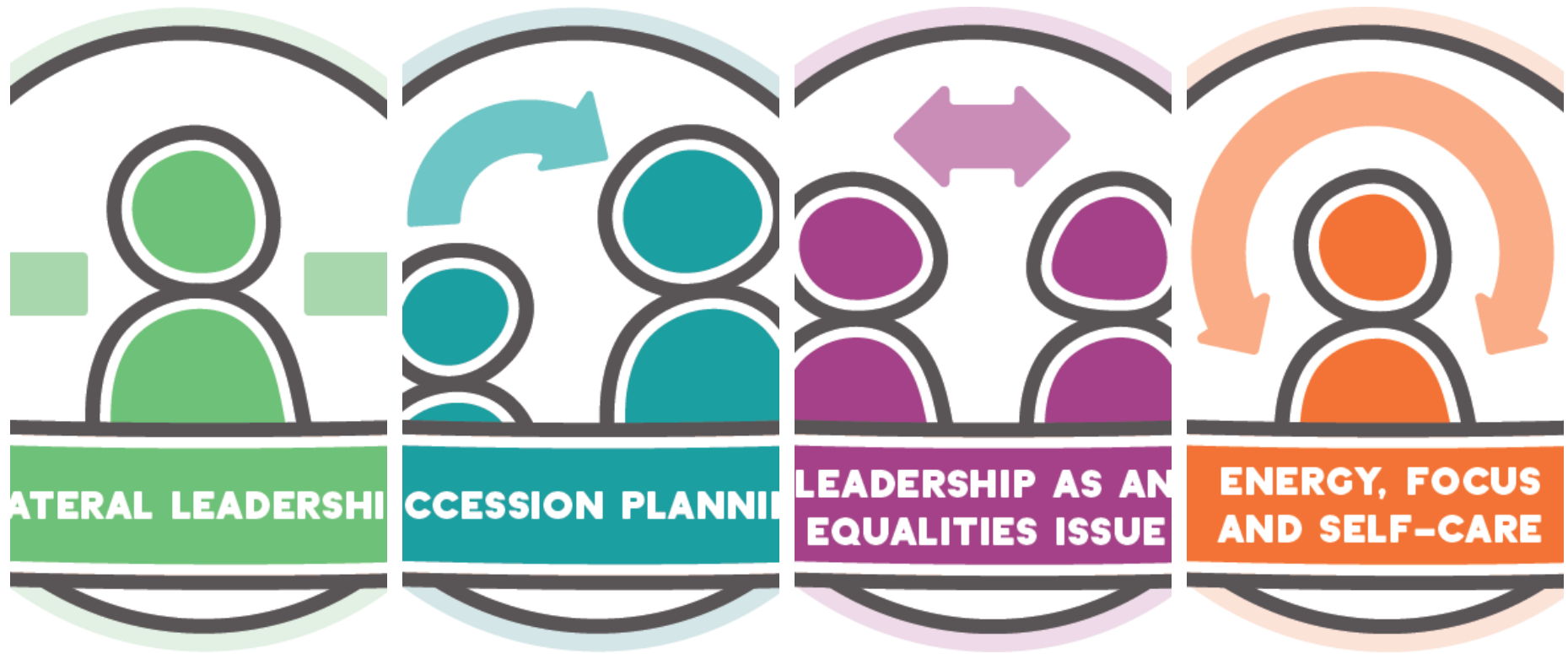
Prioritise equality and diversity in leadership proactively.



LASTING LEADERSHIP



Paradox/challenge	⇒	Principles: Sustainable leadership
The time challenge		Requires time
The leadership myth		Connects with vision and purpose
The care paradox		Prioritises self-care
The control paradox		Devolves authority and shares power
The trust paradox		Builds capacity
The equality paradox		Requires equality and diversity



LATERAL LEADERSHIP

SUCCESSION PLANNING

LEADERSHIP AS AN
EQUALITIES ISSUE

ENERGY, FOCUS
AND SELF-CARE

The Lasting
Leadership
capabilities

- Interlinking and overlapping
- Taking action in one area will support the others
- Equality and inclusion underpin all the capabilities



The organisation and its work are bigger than any one person.

The challenge:

- Organisations should avoid over-reliance on one leader.
- One person alone cannot deliver the organisation's strategic plan / aims – but these are often seen as 'belonging' to senior managers.
- Top-down approaches aren't best suited for complex and changing environments.



There is leadership in every corner of your organisation, waiting for the opportunity to emerge.

The capability:

Lateral leadership involves:

- Empowering people and building capacity
- People taking ownership
- Valuing diversity
- Delegation and devolved authority
- Learning and experimentation

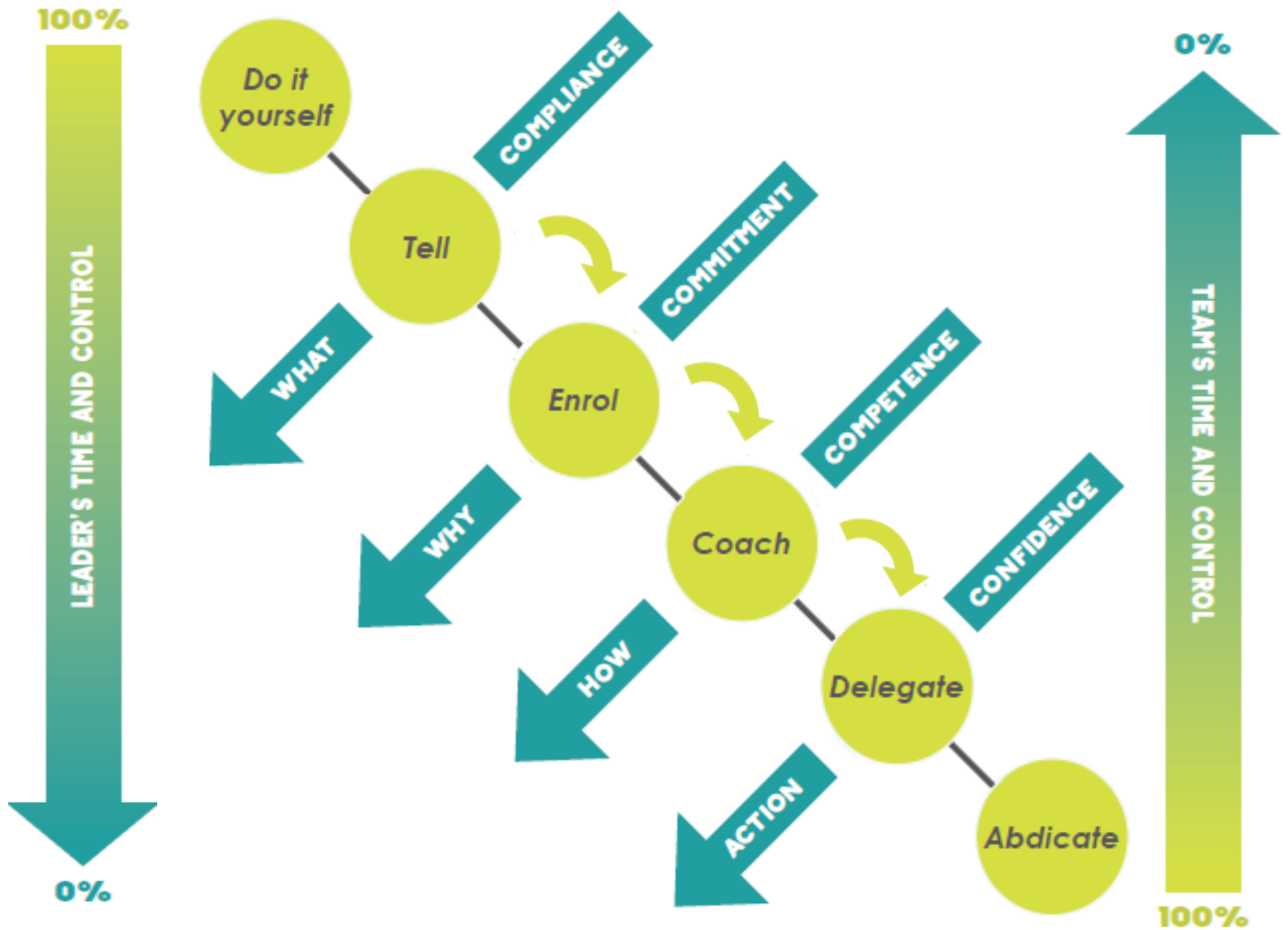
The triangle of trust

MANAGERS TRUST THEMSELVES TO STEP BACK AND MAKE SPACE FOR OTHERS

MANAGERS TRUST OTHERS TO STEP INTO THE SPACE CREATED



TEAM MEMBERS TRUST THEMSELVES TO STEP IN, KNOWING SUPPORT IS THERE IF NEEDED





Leadership capacity needs to be nourished and nurtured.

Ideas for action

Create ownership of organisational vision and outcomes

Develop leadership capacity

Top-down or bottom-up

Use your organisational values to guide your approach

Devolve authority

Provide clear commissioning and oversight

Resources to help:

Two self-assessments:

- For individuals
- For organisations

SELF-ASSESSMENT: LATERAL LEADERSHIP (INDIVIDUAL)

This section encourages you to reflect on the themes above and start planning to do something about them as an individual (though you may benefit from involving others). You can assign a score to each indicator, using this suggested scoring guide:

2 = I have good consistent evidence | 1 = My evidence is mixed or patchy | 0 = I cannot evidence this

There is also space for you to make notes and comments, which can help you discuss things with colleagues or review progress over time. These notes will usually be more meaningful than just a score.

	LATERAL LEADERSHIP: INDIVIDUAL	SCORE	YOUR NOTES
1	I trust other people to step in – 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	I aim to be valuable, not precious. I can let things go, confident in other people sharing power and decision-making.		

SELF-ASSESSMENT: LATERAL LEADERSHIP (ORGANISATIONAL)

This section encourages you to reflect on the themes above and start planning to do something about them together. You can 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

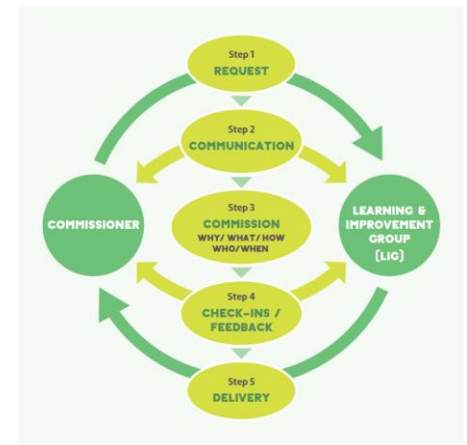
There is also space for you to make notes and comments, which can help you discuss things with colleagues or review progress over time. These notes will usually be more meaningful than just a score.

	LATERAL LEADERSHIP: ORGANISATIONAL	SCORE	YOUR NOTES
1	We encourage shared ownership of organisational strategy, vision and outcomes.		
2	We develop leadership capacity across the whole organisation.		
3	We identify what lateral Leadership looks like.		
4	We provide clear oversight and parameters, then devolve leadership appropriately and give space for it to flourish.		
5	We invest in and show confidence in people's leadership.		
6	We explore different structures and approaches that support leadership development.		

Resources to help:

- Delegation opportunities template (p.26)
- Learning & Improvement Groups Guide (p.27)
- Commissioning template (p.31)

STRATEGIC RESPONSIBILITIES <small>e.g service development / stakeholder engagement</small>	OPPORTUNITIES IN DEVOLVING LEADERSHIP	RISKS INVOLVED IN DEVOLVING LEADERSHIP	RISKS INVOLVED IN NOT DEVOLVING LEADERSHIP	REFLECTIONS AND ACTIONS <small>e.g how could this be done / who should be involved</small>
OPERATIONAL RESPONSIBILITIES <small>e.g quality, team development, monitoring & evaluation</small>	OPPORTUNITIES IN DEVOLVING LEADERSHIP	RISKS INVOLVED IN DEVOLVING LEADERSHIP	RISKS INVOLVED IN NOT DEVOLVING LEADERSHIP	REFLECTIONS AND ACTIONS <small>e.g how could this be done / who should be involved</small>





In a sector committed to social justice but which does not reflect our society, leadership is an equality issue.

The challenge:

- Underrepresentation in leadership roles remains a key challenge.
- Structural inequalities create barriers in organisations.
- Managing everyday prejudice is exhausting, leading people to put up with it.
- Intersectionality compounds barriers faced.

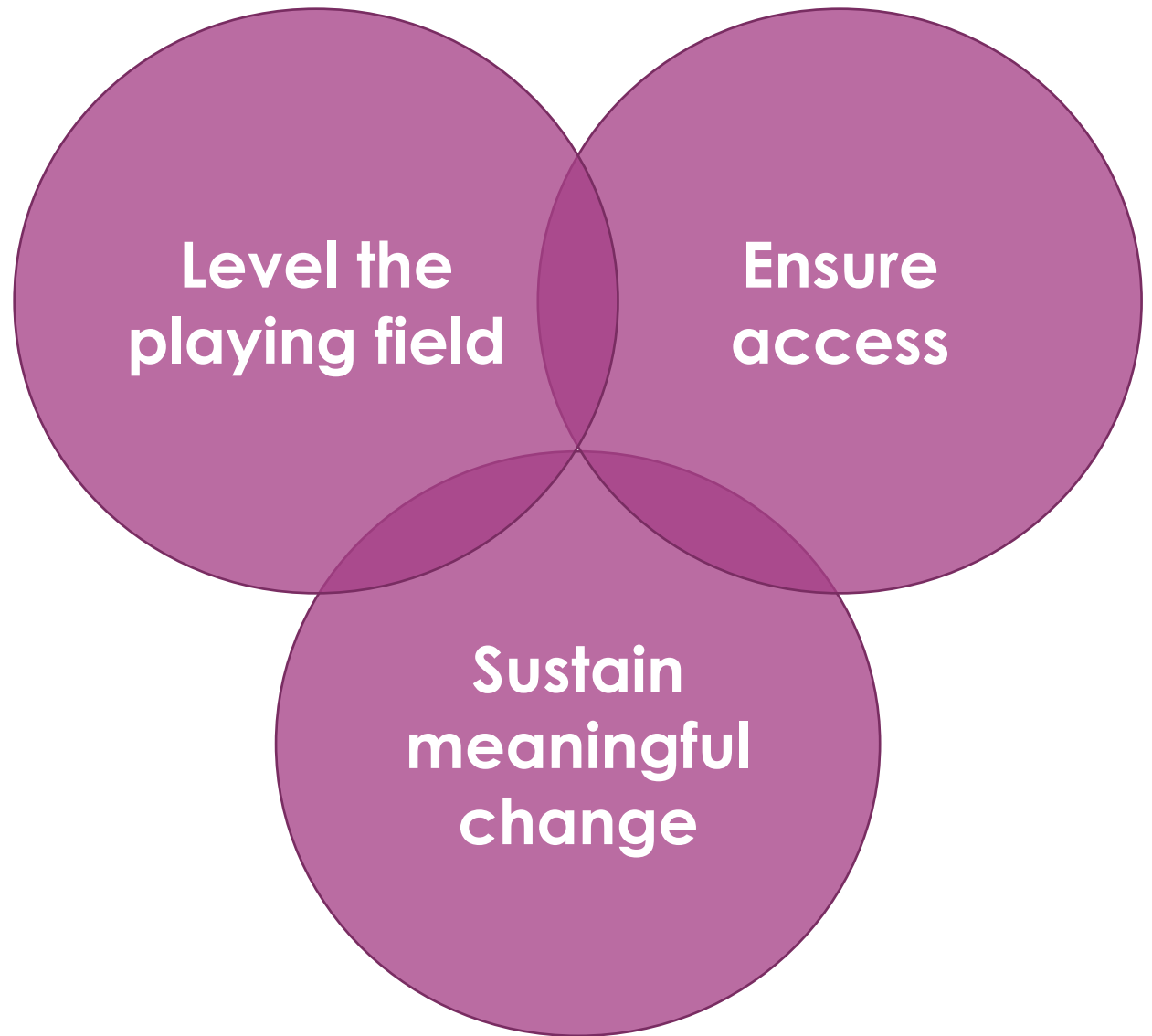


If organisations and their leadership don't reflect the communities they serve, they run the risk of perpetuating the structural barriers they seek to address.

The value and benefits:

- Improved adaptability and responsiveness
- Improved problem solving, idea generation and decision-making
- Better understanding of the needs of communities
- Increased trust in the organisation and its values
- Better recruitment and retention
- Happier workplaces and teams

The capability:
defining
action in
three main
areas





We need to get comfortable with the uncomfortable truth.

- Redefine what a leader looks like
- Develop equality focused policies
- Have open and honest conversations

Level the playing field



*Value diversity of thought,
experience and background.*

- Inclusive recruitment
- Inclusive progression and development
- Inclusive governance





Move beyond equality and diversity being a tick box.

- Enable team involvement
- Be clear and explicit
- Embed equalities across all developments
- Address structural barriers



SELF-ASSESSMENT: EQUALITIES

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.

	EQUALITIES	SCORE	YOUR NOTES
1	Our organisation reflects the communities and issues we serve.		
2	We understand the barriers experienced by people in our team. We take action as a result.		
3	We review our organisational policies and procedures to ensure they proactively support diversity and inclusion.		
4	Our recruitment procedures and processes proactively encourage and support diversity and address barriers to access.		
5	We seek advice and support from others with expertise in equality and diversity to ensure our policies and practices are inclusive and equitable.		
6	Our team (managers, trustees, staff and volunteers) undertake training in diversity and inclusion to keep knowledge and skills up to date.		

Self- assessment



The organisation and its work are bigger than any one person.

The challenge:

- Three quarters of non-profit organisations do not have a succession plan in place.
- More than 50% of current leaders planning to leave / retire in next five years.
- Covid19 has seen many reassessing priorities.



You don't know what you've lost, until it walks out the door.

The capability: four key principles

1. Succession is inevitable. Success isn't.
2. Succession planning isn't about identifying and grooming successors. It's everyone's business.
3. It's about capacity building and distributed leadership.
4. Business critical knowledge is critical.



Would you successor do the same things as you?

Succession is inevitable. Success isn't.

- Succession *will* happen - we need to plan for it
- Best done *before* it's needed
- Don't assume like-for-like
- Support successors



Succession planning is key to our sustainability and why everyone needs to be involved.

It's everyone's business

- Develop holistic succession plans
- Share the load
- Support diversity and inclusion
- Embed succession planning



The process of talking about succession was as important as the final plan.

It's about capacity building

- Build capacity
- Acting-in-absence; shadowing; mentoring; lead and seconds; etc
- Talk about it



Organisations don't have relationships – people do.

Business critical knowledge

- Focus attention and align action
- Identify and manage risk
- Create knowledge management plans



Technical responses

- Knowledge audits and management plans
- Succession plan
- Risk register
- Process documents / How To Guides
- Databases for passwords, CRMs, etc
- File sharing software



Adaptive responses

- Bringing your plans 'to life'
- Involving the team in succession planning discussions
- Capacity building
- Shadowing
- Acting-in-absence
- Identifying 'leads' and 'seconds' for specific roles/ projects



*Knowledge is experience.
Everything else is just
information.* Einstein

Managing knowledge

- Knowledge is a key strategic asset.
- Decision-making is often not routine but relies on specialist skills, judgement and knowhow.
- Often this knowledge is held in the heads of the team.

Resources to help

- Exploring the technical and adaptive responses to succession (p.18)
- Succession Planning Strategy template to help you take a step-by-step approach (p.31)
- Individual succession planning template (p.35)

SUCCESSION: A TECHNICAL AND ADAPTIVE CHALLENGE <i>"Experience is what you get just after you needed it"</i>		
TECHNICAL CHALLENGES AND EXPLICIT KNOWLEDGE "I know the things other people need to know"	V	ADAPTIVE CHALLENGES AND TACIT KNOWLEDGE "My knowhow and gut instincts are hard to share with others"
Codify and systemise what is known: break it down and put it in policies, flowcharts, how-to guides etc.	V	Coaching, giving people enough clues to help them to find their own way of doing things.
TELLING	V	ASKING
TEACHING	V	OBSERVING, SHOWING, SHADOWING

SUCCESSION PLANNING STRATEGY CHECKLIST	
STEP	<input checked="" type="checkbox"/>
1. SET OUT THE PURPOSE OF YOUR STRATEGY	<input type="checkbox"/>
2. DEFINE THE SCOPE	<input type="checkbox"/>
3. DEVELOP PLANS AND CHECKLISTS	<input type="checkbox"/>
4. BUILD CAPACITY	<input type="checkbox"/>
5. COMMUNICATE	<input type="checkbox"/>

Resources to help

Knowledge management is key to succession planning.

- Our Knowledge Management Guide helps understand the strategic importance of knowledge and how to manage it (p.22)
- Knowledge audit template (p.37)



PENDIX THREE: KNOWLEDGE AUDIT TEMPLATE

	EXISTING KNOWLEDGE <small>What we already know</small>	ADDITIONAL KNOWLEDGE NEEDED	OWNER/ SUBJECT LEAD	FORMAT <small>Where and how is knowledge stored?</small>	QUALITY <small>How accurate and reliable is it?</small>	ACTION <small>What next?</small>
STRATEGIC PRIORITIES						
REGULATORY REQUIREMENTS						
WORKING PROCEDURES AND DEVELOPMENTS						
CULTURE AND STRATEGIC DIRECTION?						



Self care – the key to sustainable leadership?

The challenge:

- People are driven by a passion, they do the best and the most they can
- CEOs work 10 hours a week unpaid – they're not the only ones
- Covid has intensified the challenge
- Funding often doesn't cover management and development



*How do we stop the
needle going into the red?*

Action is needed:

- Organisationally
- Individually





We need to be able to say no – as organisations and for ourselves. We have a responsibility not to just keep sucking it up.

Organisational ideas for action:

1. Support good governance
2. Manage capacity
3. Let your yes be a yes and your no be a no
4. Value leadership



Maybe your organisation is doing good, but is it doing well?

Support good governance:

- Ensure clarity of purpose
- Define reach
- Have time out
- Balance strategy and scrutiny
- Ask what the charity and team need





I'm running to stay still.

I can't keep working at this pace. It's like a sprint - but all the time.

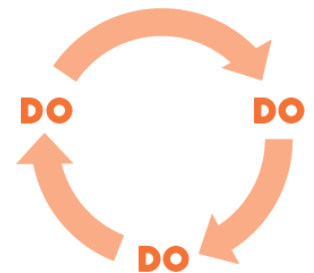
Manage capacity:

- Balance development and delivery
- Support healthy working practices
- Review and rationalise organisational priorities

Theory:
**THE
'PLAN, DO, REVIEW'
CYCLE**



Reality:
**THE
'DO, DO, DO'
RUT**

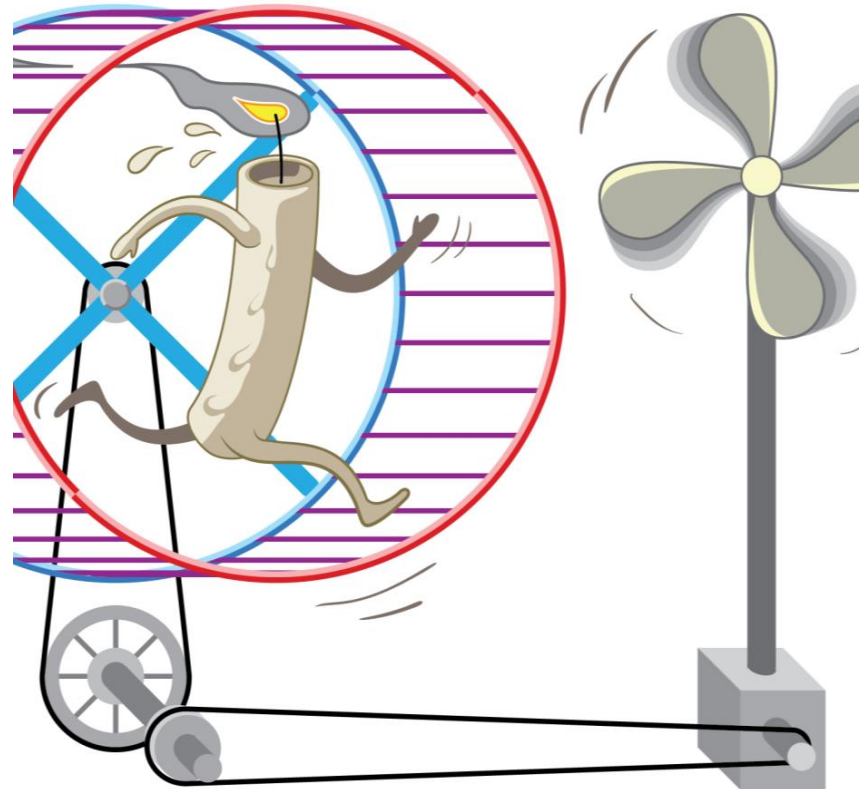




I'm running to stay still.

Saying no:

- Yes to something, is no to something else
- Use your strategy to assess new opportunities, ideas and requests
- Create room for renewal – what can be let go?





Busyness is not progress.

Value leadership

- Apply organisational values to working as a team
- Reconnect with the people you support
- Provide space for informal meet-ups
- Celebrate success





If we are not ok we can't do our best work.

Individual ideas for action:

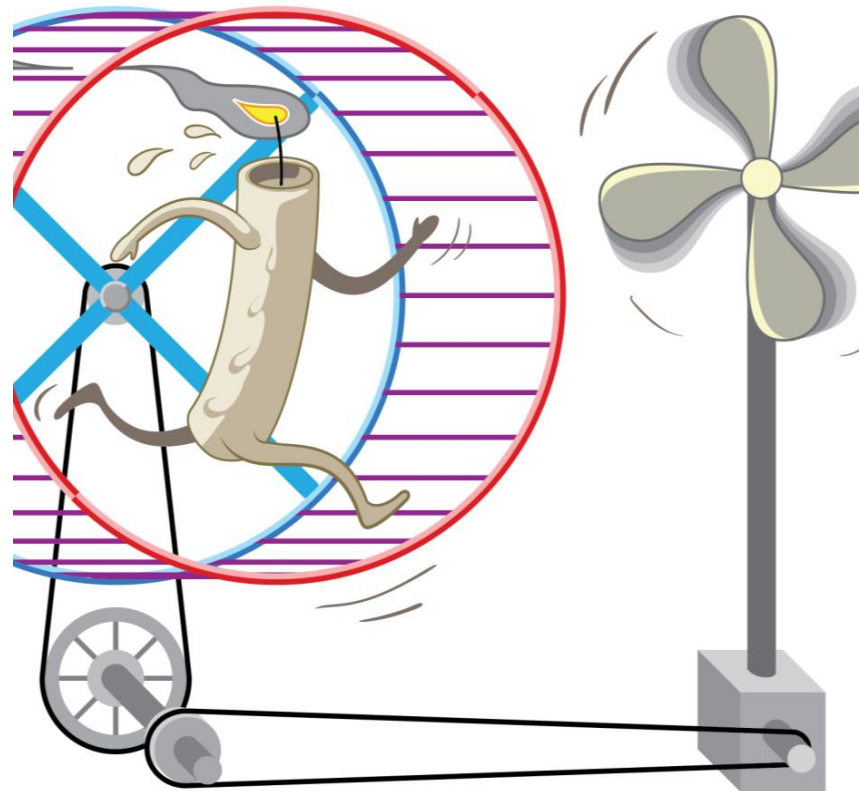
1. Prioritise self-care
2. Invest time, don't spend it
3. Be authentic, find congruence
4. Know yourself



How do you follow your passion, without burning out?

Prioritise self-care:

- Take time to celebrate achievements
- Spend time on things that give you energy
- Planning and taking time off
- Connect with peers
- Know your priorities





*I want my time to be effective.
I'm spending too much time on
things I don't really need to
think about.*

Invest time, don't spend it:

- Focus on one thing at a time
- Conscious transitions
- Create your own goals
- Make your priorities your priority!





What do you value? What is your own value?

Be authentic and congruent:

- Balance your head and heart
- Treat yourself the way you treat others
- Know when to switch off – and when to ask for help





*I want my time to be effective.
I'm spending too much time on
things I don't really need to
think about.*

Know yourself:

- Know and use your strengths
- Set your own goals
- Know your limits
- Seek inspiration
- Try new things – step outside your comfort zone



Notes of our sessions



<https://www.thelastingdifference.com/resources/>

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THANK YOU!!