



CAPLOR HORIZONS RIPPLE PAPERS

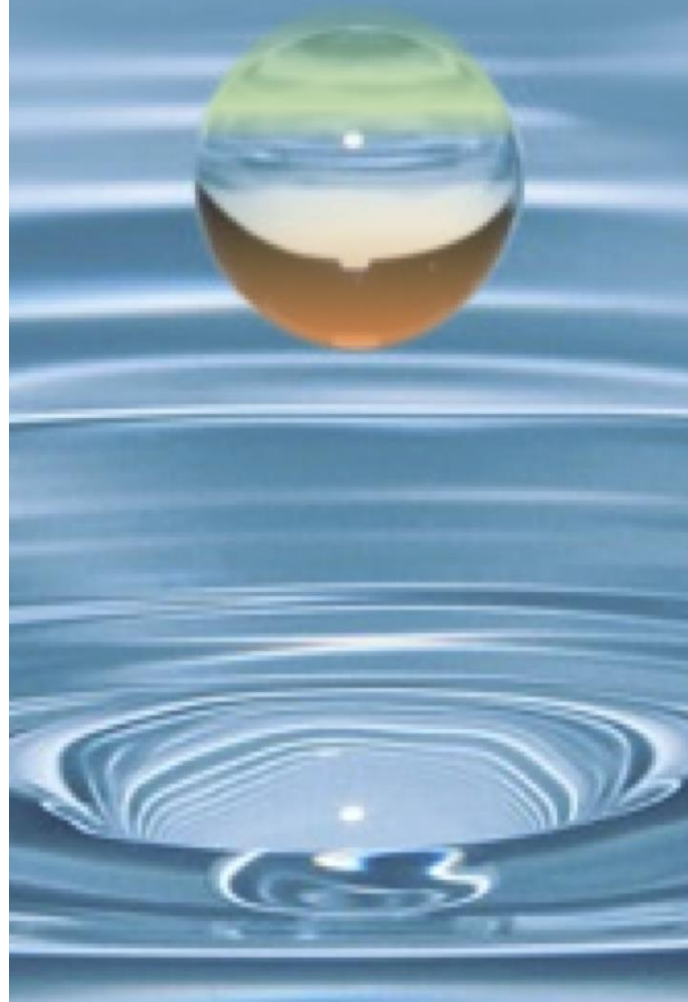
...creating ripples of change

Shared
Leadership

Reflections

2022

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Ian Williams



Learning differently

Thinking differently

Acting differently

Shared Leadership – Reflections

Background – What do you need to know?

Established in 2014, Caplor Horizons is a not-for-profit organisation. Its vision is: *a world where leaders deliver a sustainable future for all.*

The Commitment was established in April 2019. It operates within Caplor Horizons. Its vision is: *a world with a safer climate and recovering nature.*

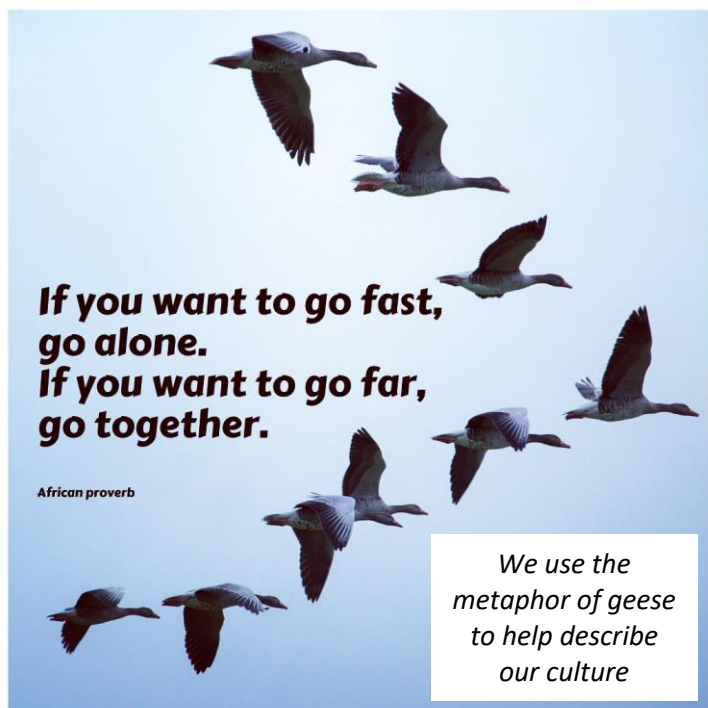
- Caplor Horizons and The Commitment are two distinct entities. Everyone shares the same organisational ‘Geese’ culture.
- We have four ‘Co-Directors’ who report to the board and share strategic and governance level leadership responsibility across the organisation as a whole.
- What is shared leadership? This has frequently been compared to ‘horizontal leadership’, ‘distributed leadership’, and ‘collective leadership’. It is contrasted with more traditional ‘vertical’ or ‘hierarchical leadership’.
- Nearly all concepts of shared leadership involve sharing power and influence among a set of individuals rather than centralising it, typically in the hands of a single individual.
- Shared leadership is an emergent approach: one of mutual influence and shared responsibility.
- Though a relatively new phenomenon in the literature, the concept of shared leadership can be traced back in time.
- Against the backdrop of power dynamics inherent in patriarchal society, feminist leadership is especially relevant to forms of shared leadership.

Rationale – Why does shared leadership matter?

Shared leadership is relatively uncommon though it is growing. Why do we promote it?

We believe that ‘shared’, ‘distributed’ and other forms of ‘collaborative leadership’ are vital to the challenges and opportunities facing our world. This paper distils reflections about shared leadership, specifically a journey of ‘Co-Directorship’. The reflections will be updated based on ongoing learning.

- The purpose is to pass on reflections to people considering embarking on a similar journey or to those who are already on the journey. Questions and comments are very welcome.



- We hope that passing on findings of our journey in an open manner will give increased confidence about the case for collaborative approaches, specifically shared leadership.
- From our perspective, all forms of collaborative leadership seem more relevant and compelling than ever given the issues we face, notably the environmental crisis.
- We especially wish to encourage people that might currently find the prospect of ‘solo’ leadership daunting, particularly younger ‘next generation change makers’.

Caplor Horizons’ Shared Leadership Journey

- **Who is involved?** After a period of one person leading, shared leadership formally commenced in 2017 with two Co-Directors involved: Lorna Pearcey and Ian Williams. This expanded, in early 2021, to four Co-Directors: Rosie Bishop, William Eccles, Lorna Pearcey and Ian Williams.
- **Review** – in early 2022, as Board Advisor, Dr Peter Moore carried out a review. Arising from this the section called ‘*Conditions for Success*’ was added to capture the latest emerging learning.
- **Renewal** – in August 2022, the four Co-Directors (or ‘Quartet’) met to make further tweaks to how they worked together: essentially to rebalance to ensure all were engaged even more effectively with both Caplor Horizons and The Commitment
 - In brief, three of the Co-Directors (a ‘trio’) had been previously especially involved with Caplor Horizons (Lorna, Rosie, Ian) whilst two of the Co-Directors (a ‘duo’) were particularly involved with The Commitment (William, Ian).
 - It was felt important to make these changes based on: (a) feedback from a growing team; (b) the need to ensure optimal alignment with values and culture; and (c) efforts to keep building trust and ensure greater balance regarding power, gender and age.

Our experience? How has shared leadership made a meaningful difference?

- Benefits from diversity: better quality of decision making, visioning, reflection and insights about opportunities and strengths; also, better responses to challenges, risks, priorities for improvement.
- Better prioritisation of health and well-being, less pressure on individuals.
- Better sensitivity, depth of relationships, internal teamworking, wider collaboration.
- Opportunity to express organisational values and culture.
- Better pace of action.

What happens day to day? What happens regarding roles and responsibilities?

The shared leadership, or *Co-Directorship* relationship between William, Rosie, Lorna and Ian, is one of equals (e.g., it does not involve *CEO-COO* type allocation of role and responsibilities).

An overarching Co-Director role description exists. This is articulated in our ‘Governance Guide’.

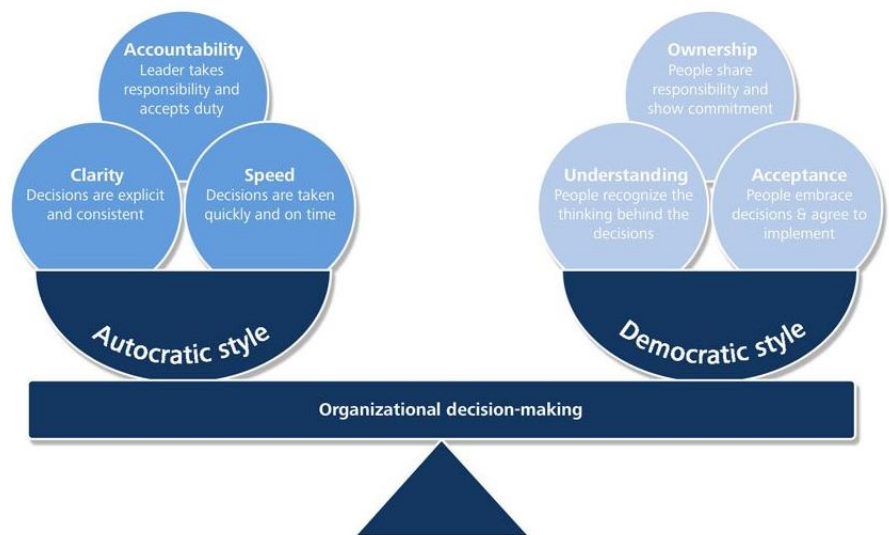
The most important leadership responsibilities are shared, including...

- Promoting the “*geese*” culture, including our values of courage, compassion, and creativity.
- Sharing strategic oversight.
- Sharing decision making on everything that matters.

- Leading on encouraging people to learn, think and act differently.
- Being committed to a dynamic, appreciative, and fully engaged approach where their respective contributions vary over time.
- Promoting health and wellbeing.
- Enabling everyone to have the opportunity *to do their best at what they are best at for the benefit of others.*

What are the risks related to shared leadership?

- Risks are lower compared with having a new person/people join.
- It is appreciated that the arrangements are relatively low risk in significant part because they are attuned to the personalities involved and the relationships that have been forged; as such, the balance could change if any of the four people involved changed.
- Any changes that might happen are subject to decreased risks regarding succession (e.g., if one of the three Co-Directors' left, then the overall effect would be relatively little compared to a solo CEO model).
- Risks of the arrangements not working are addressed through regular and robust review.
- Substantial experience of *Co-Directorship* previously existed internally (Lorna and Ian). This was useful in giving confidence and reducing risks when arrangements expanded (Rosie, Lorna, William and Ian). Furthermore, a good bedrock of trust exists between all the people involved.
- It is appreciated that the nature of decisions made in our organisation means that the decision to have a Co-Director model is relatively low risk. Organisations vary in what is needed for effective decision making (e.g., an Accident and Emergency Ward or Humanitarian Emergency NGO compared to an International Development NGO); also, according to stage of life-cycle – e.g., during the initial stages of a start-up, relatively fast decision making can be helpful.
- As such, one practical consideration – that makes Co-Directorship, and a participatory approach in general with other colleagues so relevant – is that the balance of important decisions (beyond those made individually at a tactical level) can be with a *democratic style* (see diagram) given the day-to-day nature of what's involved.



Conditions for success

Experience with four Co-Directors over the first year in 2021 was very positive.

A review completed in early 2022 suggested the following conditions were required for this success...

- Trust between the Co-Directors, based on the trusting characters of the individuals and developed by the experience of working together, a combination of the amount of time spent together and the intensity of the issues addressed together.
- Individual characteristics: high trust, low ego, dislike of conventional hierarchy.
- The Enneagram tool has been a helpful basis for mutual understanding.
- Diversity of skills, experience, age, gender and backgrounds.
- For three of the four, some prior experience of working as Co-Directors, normally as one of a pair.
- Emphasis on communication with regular and robust discourse within the group of four including constant checking on health and wellbeing, with reallocation of tasks as needed.
- Careful design of the structure, with widespread consultation, for example on governance implications, before implementation.
- Clear understanding of scope for individual decision-making.
- Communication to other staff on whom to go to for what.
- The Co-Director journey has been accompanied and supported by Dr Lynne Sedgmore. Lynne is a highly experienced facilitator, coach and mentor. For instance, sessions with her on issues of power and leadership were especially helpful; also sessions to extend and embed learning about the Enneagram, etc.
- 'Work in progress': some kind of mechanism whereby all four Co-Directors can gain the benefits of feedback on their performance and discussion of their individual development without the Board or the Board's Chair needing to know in elaborate detail who did what.

What are the costs involved?

Taking all elements into consideration, this is a lower cost approach than a traditional leadership model alternative.

In brief, what are our conclusions?

Co-Directorship minimises risk from a governance standpoint whilst maximising synergistic opportunity from a cultural, operational, and strategic standpoint.

It also provides a modelling of an approach that we believe is very important for the times we live in – a more collaborative, shared leadership approach.

Based on the experience gained, there are conditions for success for the model to work well.

Caplor Horizons – Background

Established in 2014, Caplor Horizons is an independent charity. We work with other charities and responsible businesses and now have over 50 Advisors. These are outstanding people that bring specialist knowledge and experience. They contribute their time on a voluntary basis, or at reduced rates, so that Caplor Horizons can provide high quality and distinctive services at an accessible cost.

Working locally, nationally and internationally, we help other organisations think differently about themselves and the new horizons that they face. We support them in strengthening their leadership, renewing their strategy and improving their influence.

We want to encourage and assist a new generation of organisations that are committed to making a positive and lasting impact. We believe that if we are to achieve real, sustainable change, we need to inspire and enable people to learn differently, think differently and act differently.

Our vision is: *A world where leaders deliver a sustainable future for all*

Our purpose is: *To be courageous, compassionate and creative in facilitating transformational change*

Our values are:

- **Courageous** – We are courageous change makers committed to challenging assumptions, taking risks and having difficult conversations
- **Compassionate** – We are open, understanding and heartfelt, encouraging the nourishment of our whole selves and others
- **Creative** – We learn, think and act differently, and are innovative and resilient in an ever-changing world

Our beliefs are:

- Through diversity we ignite dynamic innovation
- Collaboration helps achieve greater impact
- Everyone matters
- We are all leaders in our individual and collective ways – we are all change makers!
- Learning is more effective if it is fun, engaging and creative
- Building on people's strengths creates greater resilience

Our strategic goals:

- Goal 1: Transforming Leadership
- Goal 2: Strengthening Resilience
- Goal 3: Increasing Collaboration

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