

# A Making sustainable

**Sustainability is a self-evidently desirable goal – or is it a comforting mantra like motherhood and apple pie, useless in guiding thought and action?**

## What might sustainable mean, and why does it matter?

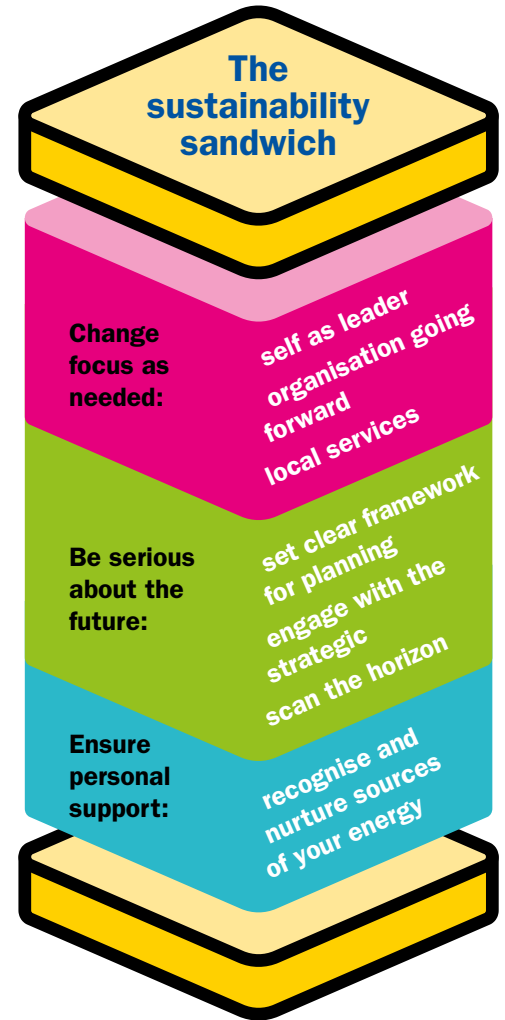
The question, ‘*Who and what needs to be sustainable?*’, recurred throughout the ADVANCE programme, and was answered in very different ways depending on the circumstances of individual charities and chief executives. For some, acute business pressures meant that the timescale for thinking and action was very short-term. In this situation, sustainability pretty much equalled the immediate survival of the organisation and its support to carers.

Other charities took the opportunity of facing an uncertain future to re-define what they meant by sustainability. Mentors used searching questions to invite board and chief executive to review the underpinning values and purpose of their organisation, along with its governance. For example, what was the core purpose of the organisation? Was it to fulfil contracts in a way that most readily met the needs of commissioners? Or was there a charitable purpose that had been neglected? If so, what kind of change might ensure the clearer matching of intentions with action?

## ADVANCE insights into achieving sustainability

One chief executive summed up the challenge facing her:  
*‘The pressure on small charities with limited capacity in a very volatile climate means that it is critical I remain clear headed and confident that the steps I am taking are the right ones. The pressure and responsibility to meet all the competing demands is exceptional.’*

Essential ingredients



## What is your focus?

There are several possibilities for focus. At any given time, be clear about where you're directing your attention, and why.

- **Sustainability of self** – as a leader, how can you deal with the pressure on you without damaging your health?
- **Sustainability of the organisation** – given the current environment, what are the future options for your organisation?
- **Sustainability of services to beneficiaries locally** – in the case of a charity, how can beneficiaries continue to be supported even if your particular charity ceases to exist?

## Have you got these key areas covered?

### **Set a clear framework for future planning**

Both board and senior management team often reported themselves as swamped, feeling that they had to take responsibility for far more than they could realistically deliver. Work with mentors helped them set clear priorities from a mass of possible developments. What support do you have/might you have in:

- Creative thinking about the future?
- Identifying the priorities deserving most attention?

### **Engage with the strategic, not just the operational**

Many chief executives lacked confidence in dealing with financial issues, the assessment of 'risk', and acting to expand resources and capacity as well as reduce costs. What support do you have/might you have in:

- Further developing skills in understanding finance, assessing risk, and working with the board to plan strategies and action?

### **Understand the operating environment**

With so much to occupy them in keeping their charities operating day-to-day – workforce issues, in particular were hugely time-consuming – many leadership teams paid comparatively little attention to the world outside. ADVANCE mentors showed them how they were missing out on key opportunities.

Who supports you/could support you in:

- Horizon scanning for developments and upcoming changes/opportunities?
- Expanding your links to potential collaborators locally?

### **Maintain the drive and determination needed to achieve sustainability**

ADVANCE mentors encouraged chief executives to recognise and nurture the sources of their energy, motivation and belief in themselves.

Who supports you in:

- Keeping up the levels of energy and determination needed to make your organisation sustainable?

## Might these ideas help you?

- Take some private time to reflect on the issues raised in this card that feel most relevant to you.
- Do you think it would be helpful to discuss any of these issues with senior colleagues or board members? What kind of outcomes would you be looking for from discussion? Think about what setting would be best for a discussion of this kind.

## Want to know more about ADVANCE?

The findings outlined in this card come from an independent impact study on ADVANCE, see [www.publicserviceworks.com/resources-and-downloads](http://www.publicserviceworks.com/resources-and-downloads)

For more information on the ADVANCE programme, see <https://professionals.carers.org/advance-mentoring-scheme>

# B Strengthening governance

What goes on in the boardroom doesn't stay in the boardroom...

## Tales of woe and triumph

To staff and clients, an organisation's board often seems remote and irrelevant. But decisions made – or avoided – by the board have consequences that affect all stakeholders. If the leadership of an organisation is unclear about what it stands for, or cannot express and pursue that purpose in a focused way, then failure is almost guaranteed.

The board, then, has to be clear about where the organisation is headed – and to describe how the organisation is going to get there. What values and assumptions about desirable behaviour will shape the journey? Take building on strengths, for example: does everyone in the organisation understand the importance of appreciating others in specific, succinct and sincere ways? The relationship between chair and chief executive sends clear signals about what is expected.

The ADVANCE impact study revealed tales of woe and tales of triumph, showing 'vicious' and 'virtuous' circles of governance. The 'virtuous' highlights the effects of learning from mentoring. Prompts overleaf invite you to locate you and your organisation in these spin cycles.



**'I had to put the organisation first  
and overcome my dislike of conflict'**

**'I am now absolutely  
signed up to the  
importance of the  
board in our success  
and survival'**

**Critical friend  
encourages chief  
executive to be  
proactive**



**Joint review  
of roles and  
responsibilities  
with chair**

## **Turning virtuous...**

**Improved  
ability to  
assess the  
value and  
risks of  
potential new  
directions/  
opportunities**



**Improved ways of  
working/formal  
processes based  
on strengths**



**'My trustees  
are now  
more willing  
to take on  
responsibilities  
that are new to  
them'**

**'I now always  
let the trustees  
know of any risks  
– a standing item  
on the agenda'**

**Strategic direction  
and core values  
sharpened and  
clarified on regular  
basis**



**'I have managed to guide the board to develop a  
more useful business plan aligned to our strategy'**

### **Might these ideas help you?**

- Reflect privately on the two circles. For each, what resonates with your own experience of governance for your organisation?
- Invite a senior colleague or board member who does not always take the same view as yourself to consider privately the question above.
- Together in an informal setting share perceptions. Make sure you spend as much time listening as talking.
- End by discussing practical ideas for transforming the 'vicious' into the 'virtuous'.

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# C Working across boundaries

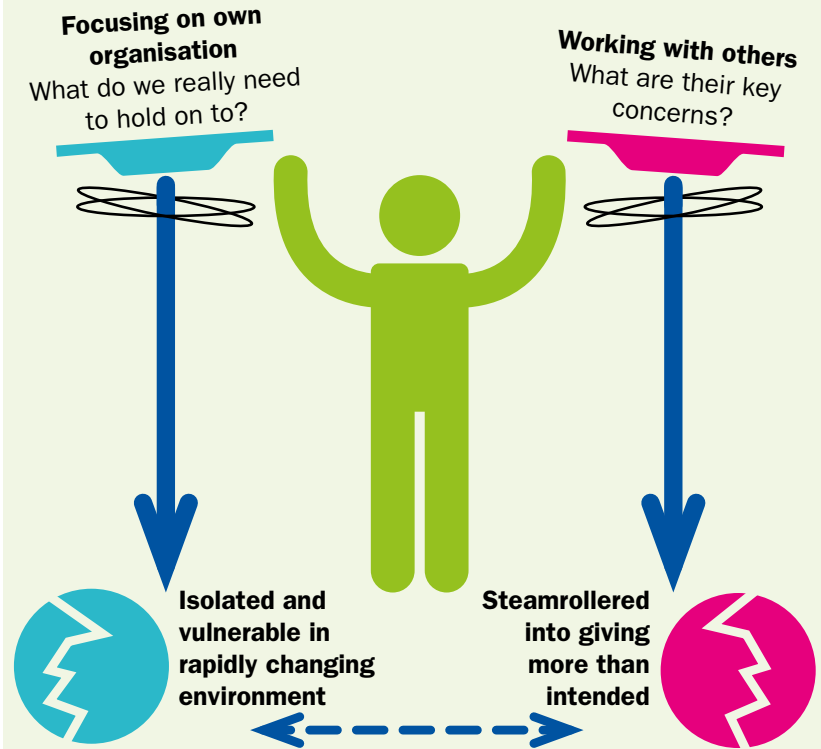
**Collaborative working involves taking account of other people – no wonder there are tensions...**

## The biggest challenge of all?

Many chief executives saw working with other organisations as presenting the biggest challenge of all. It was unfamiliar territory where at least some degree of control would be lost; and, in some cases, chief executives feared potential exposure of significant vulnerabilities. On the other hand, they were aware that splendid isolation was no longer a realistic option.

A complex mixture of thoughts and emotions for leadership teams was compounded by extremely demanding conditions for local charities. Increasingly, commissioners were issuing tenders for work which, in practice, required the joint participation of several different organisations. As a result, there was strong temptation to see collaboration, or merger, with other charities as the best way forward. At the same time, there was often only a short time frame in which potential collaborators could reflect on, and discuss, pros, cons and specifics of working together.

## Managing a core tension: attention to both internal and external concerns



## Balancing and juggling

Whatever type of relationship was on the cards, chief executives taking part in ADVANCE could be observed trying to find points of balance within the following polarities:

- Openness to partnership vs working in a competitive environment.
- Internal focus vs external focus.
- Combating limitations vs building on strengths.
- Personal development vs organisational development.
- Charity values vs commercial operations.

Mentors played a hugely important part in helping leadership teams deal constructively with the tensions involved in juggling acts of this kind. Crucially, leaders learned to appreciate that common purpose is the cornerstone of successful partnership working – and it is necessary to agree on, and work towards, clear shared goals. Mentors also supported leadership teams in developing:

- Skills to negotiate – *‘We now approach dialogue with potential partners in a tactical way.’*
- Practical ways to work differently – *‘Practical ideas – like creating workstreams – made a real difference to how we thought.’*
- Confidence in building relationships – *‘The mentoring was a catalyst.’*
- Confidence in taking a lead – *‘I pushed back on a couple of things and stood my ground which I may not have done before.’*

## An aid to juggling

The versatile framework that appears in this card (and was first introduced by Card 3) offers leadership teams a constructive way of thinking about tensions, to help guide decisions and actions.

The top line of the square identifies two important issues where skilled attention is needed to ensure the success of a collaboration. As shown in the diagram, however, the two issues can easily be seen as opposites. If you concentrate on one issue to the exclusion of the other, where will you end up? The arrows running down the sides of the square tell the gloomy truth. The results shown on the bottom line are far from those desired by any leadership team.

Here’s the challenge:

**As a leader keen to develop constructive relationships with others, how do you keep on the top line and avoid the danger zone?**

What approach will you take to respond constructively to **both** issues and keep some kind of balance between them? What support would help you do this? And who would it be useful to involve in the challenge?

### Might these ideas help you?

- See challenge opposite!
- The core tension illustrated here is just one of those identified on this card. Which others might you find it useful to analyse in the same way? And are there further core tensions in partnership working that you would like to explore?

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