

Developing Leadership in the Social Sector

Year 1 Evaluation of the Clore Social Leadership Programme

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1 Executive Summary

Aims

This report reviews the first year of the operation of the Clore Social Leadership Programme (CSLP), as part of a four-year evaluation partnership between the Clore Social Leadership Programme and the Work Foundation.

It has two primary aims:

- 1) To provide insight and support to the Clore Social Leadership Programme team and Board of Trustees on developing and improving the Programme
- 2) To indicate impacts of the Programme on individual Fellows, and on the broader social sector

Methodology

The evaluation takes a primarily qualitative approach, appropriate to the small number of Fellows. It uses a longitudinal, multi-source approach to track the progress of individuals and the Programme.

Key Findings

Operating

- The Clore Social Leadership Programme has got off the ground well, and completed one full 'cycle' between application and selection through to the next application and selection. With full funding available for 14-16 Fellows in the 2010 and 2011 intakes, this is a major achievement, especially given the stark changes to the funding environment since the Programme was given the green light in 2008.
- The application and selection process has been run twice, the second noticeably streamlined following reflection and evaluation of the first iteration. Both times it has produced a diverse group, reflecting the Programme's broad concept of 'leadership'.

Delivery

- The vast majority of the individual elements of the CSLP have been well received by the Fellows. On the rare occasions where individual Fellows have expressed serious concerns about a Programme element, these are not consistent across Fellows, suggesting that particular elements are not fitting with an individual's learning style or approach, rather than being inappropriate to the cohort as a whole.
- The high level of flexibility and personal choice provided by the CSLP is the most controversial aspect of the Programme. A large number of Fellows were positively attracted to the Programme's flexibility, but then some subsequently felt unclear or unfocused when undertaking the Programme. This issue is made more complicated by some Fellow's later reflection that overcoming their early sense of 'too much choice' was a key part of their learning experience.
- There is some evidence of teething problems within the first cohort of Fellows regarding:

- Time for personal and collective reflection within residential elements
- Fellows' ability to complete the full range of Programme elements in the overall timeframe suggested
- Fellows' ability to effectively utilise the full learning budget within the timeframe suggested

Outcomes

- **Reflection:** There is strong evidence of increased reflection among Fellows – on their individual strengths and weaknesses, their roles as leaders, their relationships with others at work, and their role and ability to contribute within the social sector more broadly. Several 2010 Fellows interviewed for this evaluation described the Programme as personally 'transformational' for them.
- **Developing a cadre of social sector leaders:** Although the majority of Programme elements focused on individual leadership development (something sensed by most of the 2010 Fellows), most of the Fellows nonetheless felt that they were likely to view themselves as part of a cadre of Clore-developed leaders beyond the end of the formal elements of the Programme.
- **Contributing to the broader debate:** The Clore Social Leadership Inquiry, held in November 2010, showed the 2010 Clore Social Fellows able to participate and contribute creatively and insightfully to the broader debate on leadership in the sector.
- **Behaviour change:** Most of the 2010 Fellows interviewed for this evaluation could point to specific changes in the way they operated at work which they would attribute to their participation in the Programme.
- **Relative impact on the sector:** It is probably too early to expect visible or measurable impacts of the CSLP on the broader sector – at the time of this evaluation (end of 2010), no Fellows had completed all the Programme elements, and most – undertaking the Fellowship part-time – were only half-way through. However, from the Fellow's contributions to this evaluation, it is clear many are gaining access to opportunities and roles in organisations that are already aware of the CSLP, and look favourably upon it.
- **Justifying the CSLP approach:** The counter-factual – 'would the CSLP money be better spent through other means or forms of leadership development?' – is almost impossible to determine. For example: should a much larger number of individuals from the social sector be given access to a less intensive programme?

However, from the successes and lessons of the 2010 Fellowship cohort's experience, some important reflections are possible in distinguishing the value of the CSLP to the sector compared to alternative programme configurations:

- The Programme's highly-reflective approach fits with the reflective nature of the social sector, always seeing itself in a wider context with broad social aims.
- It offers an intensity and flexibility of leadership development experience which is mostly absent from existing programmes and offerings aimed at the sector specifically – the flexibility in particular attracted a number of applicants who were not interested in traditional 'content-led' longer programmes such as an MBA.
- The Programme has ambitions for its developing cadre of Fellows beyond those expected of more 'mainstream' management development programmes.

2 Introduction and background

In early 2009, the Work Foundation was commissioned to be the evaluation partner of the embryonic 'Clore Social Leadership Programme' (CSLP, or 'the Programme'). The relationship was very deliberately positioned as a partnership, firstly so that the evaluators could work closely with the Programme team as the Programme developed, and secondly, so that the cumulative impact of the Programme and the broader social sector could be tracked over at least four separate intakes of Fellows.

The long-term nature of the evaluation partnership allows for multiple engagements between the evaluators and the Programme, with each element of the Programme assessed, as well as the broader impact considered.

This report provides an evaluative overview of the first year of full operation of the Clore Social Leadership Programme. It covers, primarily, the first year of the 2010 intake of CSLP Fellows, but also incorporates aspects of the development of the Programme design and delivery processes through 2009.

In providing an overview, this report also draws on the individual area reports produced by the Work Foundation within the evaluation partnership structure since late 2009. These include:

- A 'baseline' report on the position of leadership development in the social sector in 2010 (published February 2010)
- Reports reviewing the selection and assessment process for both the 2010 and 2011 intakes (February 2010, by TWF; April 2011, in-house)
- A report reviewing the 360 degree tool used in December of the Programme (submitted to CSLP for internal use, March 2010)
- The design and delivery of a 'collaborative inquiry' event which brought together key stakeholders in the sector to discuss the CSLP's role within leadership development in the sector (November 2010)

This report builds on, but does not supersede or replace, the more detailed analysis presented in these earlier reports. In addition, this Year 1 report should be seen as part of a broader set of evaluation activities undertaken by the programme – these would a report by the Leadership Trust reviewing the Ross-on-Wye residential, a December 2010 report by consultant Phyllida Shaw which interviewed trustees and 2010 Fellows, and CSLP Fellowship Director Siobhan Edwards' review of sponsor feedback.

In this report, the term 'the social sector' is defined as it is by the Clore Social Leadership Programme:

'The full range of social-purpose non-profit activities – charities, community organisations, social enterprises, co-operatives, social landlords and housing associations.'

The report is divided into four main sections:

- 2) Background and Introduction
- 3) The evaluation
- 4) Findings
- 5) Going forward into 2011 and beyond

2.1 Leadership in the social sector

2010-11 is a time of extraordinary opportunity, and extraordinary difficulty, for the social sector. The Coalition government's announcements through its Comprehensive Spending Review in late October 2010 presaged major additional demands on UK-based social sector organisations, particularly those engaged in welfare, and the broader support of those in receipt of welfare payments. Yet the Coalition's stance towards the social sector is, on the face of it, hugely positive: it apparently sees the social sector as an ever-more crucial partner to the state in the delivery of a broad range of social services in the UK through its 'Big Society' mandate. This opens up the possibility of a social sector which takes on a vastly expanded role, remit, and status.

The social sector is already of ever-growing importance in the UK economy, comprising, according to the NCVO Almanac for 2010, a workforce of more than 660,000 in 2008, and it is now poised to develop innovative opportunities to deliver social good to the UK, through new funding approaches such as social investment bonds, and the nascent Big Society Bank. However, the mechanisms through which the social sector will be able to operate such partnerships within the 'Big Society' remain opaque, and the speed at which alternative funding sources will be able to compensate for the retreat of the state is uncertain, to say the least.

Navigating a path to success for the social sector in these circumstances will require extraordinary leadership. While the sector undoubtedly possesses its share of extraordinary leaders, its ability to identify and develop a broader cadre of new leaders to take it through the years to 2015 must be in doubt. Only in April of 2010, a senior participant in a Guardian roundtable on the future of the social sector felt able to comment: 'It's 2010 and we [the social sector] have just started to talk about leadership development'. This is despite a lack of leadership being cited as one of the top five constraints facing the social sector in a recent Cabinet Office report, and a 2009 Institute for Public Policy Research paper finding that the sector has a pressing need to improve its skills in key leadership competencies as diverse as strategic thinking, influencing and negotiating and communication and interpersonal skills.

It is not yet clear whether the social sector has developed sufficient leadership strength-in-depth to meet its needs. A 2008 survey of leaders from the Third Sector Leadership Centre found that although 95% of leaders in small and medium-sized charities think they would benefit from further leadership development, they have, at most, three days a year to spare for training. The 2011-14 Skills – Third Sector National Strategy indicates that leadership development remains a priority for the sector. Even if sector leaders are able to find the time for leadership development, a 2010 CIPD report on learning and talent development found that over half (51%) of social sector organisations expect their leadership development budgets to decrease over the coming 12 months, while only 9% of organisations expect it to increase.

It was concerns over the social sector's continued lag in relative spend on leadership development compared to the private sector which led to the founding of the Clore Social Leadership Programme. The background report which laid the ground work for the Clore Social Leadership Programme criticised the 'scattergun' approach the social sector was taking to leadership development, and instigated the Programme as one route to improving the opportunities for leadership development for aspiring leaders in the social sector. The Programme looks to plug a gap in the provision of leadership development for those in the social sector, and to at least partially compensate for the poor level of investment in leadership development in the social sector compared to the private sector.

As long ago as 2003, an ACEVO report on social sector leadership found that that the sector faced significant problems in attracting and retaining staff with leadership potential. Its 2007 survey of CEOs found that, still, only 19% of leaders were 'home-grown' in the social sector and 74% of social sectors organisations did not have a succession plan. Programmes such as the Clore Social Leadership Programme therefore explicitly look to develop aspiring leaders for the social sector from within the social sector.

2.2 The Clore Social Leadership Programme

The Clore Social Leadership Programme: ‘aims to identify, develop and connect aspiring leaders in the wider Social Sector for the benefit of individuals and progressive social change in communities across the UK’.

The CSLP design is characterised by flexibility for the individual to shape their own Programme. Although there are a number of required elements, the nature, focus, and approach to those elements is largely within the locus of the individual Fellow’s control. In addition, they hold their own development budgets as part of their Fellowship, which (with approval from the Programme team) they can deploy according to their perceived need – this could include paying for courses, or conference and event attendance, as well as additional coaching, among other things.

The Fellowships can currently be held for one year on a full time basis, or two year part time. The CSLP is deliberately not a qualification or certified programme, to maintain the flexibility of delivery and content. The CSLP is not primarily focused on content delivery, but on developing reflective leaders who seek out their own solutions to their specific leadership issues. It is predicated on developing social sector leaders in four areas:

- **Personal qualities:** that the Fellows should be comfortable in knowing themselves, being themselves, and looking after themselves
- **Context:** that the Fellows should have the ability to assess context and sense the broader situation
- **Working with others:** that the Fellows can work effectively both with and through others
- **‘Toolkit’:** That the Fellows have at their disposal a good leadership ‘toolkit’ of business capabilities

2.3 The Clore Social Leadership Programme structure

The Programme is structured through a number of discrete elements, some of which are whole Fellowship group activities – particularly the two main residentials in January and November, and Action Learning Sets, as well as some more optional single-day workshops and events – but the majority are individual projects and activities (for example the practice-based research project, secondment, and individual tuition purchases) whose focus and specific aim is determined by the Fellow themselves.

Each Clore Social Fellow plans their Fellowship individually, in consultation with the Programme Team, and, in some cases, their mentor or coach. Each Fellow draws up a Leadership Development Plan (LDP) in the early part of the Programme which is agreed with the Programme Team, and used as a basis for review as each Fellow completes the Programme. The LDP can evolve and be revised as the individual Fellow’s understanding of their desired goals and leadership journey develops through the Fellowship.

Below are the key elements of the Programme, as it was delivered for the 2010 cohort:

360 degree assessment:	<ul style="list-style-type: none">• A 360 degree individual review before the Programme starts to provide evidence of capability and potential which will help to identify priorities for further development
Residentials:	<ul style="list-style-type: none">• Residential block weeks for all Fellows in January and November to include:<ul style="list-style-type: none">○ Site visits to challenging contexts led by inspiring/challenging leaders○ Introduction to, and exploration of, the leadership framework and key

	<p>elements of the Programme, as well as sessions on 'toolkit' skills</p> <ul style="list-style-type: none"> ○ Small group spaces to share and reflect on learning ○ For the 2010 intake, the additional residential elements included a course at The Leadership Trust in Ross-on-Wye in July, and a day on innovation hosted by NESTA (the National Endowment for Science, Technology and the Arts) in London.
Action Learning Sets:	<ul style="list-style-type: none"> ● All Fellows are assigned to one of two professionally-facilitated Action Learning Sets, which meet five times in the first year (dates and locations arranged within the Set) to allow individuals to bring issues and concerns about work or non-work issues to the group for support and discussion.
Mentoring:	<ul style="list-style-type: none"> ● Each Fellow is encouraged to source a personal mentor who can be consulted during the Programme (to share experience, expertise and networks)
Secondment(s):	<ul style="list-style-type: none"> ● An extended 'secondment' or internal consultancy in a different context either within, or a related area outside, the wider social sector
Research:	<ul style="list-style-type: none"> ● A practice-based research project on a subject chosen by the Fellow to develop the Fellow's skills as a critical user of research, and to help develop a wide evidence base for the social sector – this can also reflect issues of concern to the Fellow's employer
Coaching:	<ul style="list-style-type: none"> ● Access to professional coaching support to help make the most of the Fellowship opportunity, or in planning career progression from the Fellowship
Individual tuition purchases	<ul style="list-style-type: none"> ● Each Fellow controls a personal training budget, from which they can purchase development opportunities. While the individual Fellow controls the purchases, use of the budget needs to be signed off by a member of the CSLP Programme team.
Bursary	<ul style="list-style-type: none"> ● Payable to employers to release a part-time Fellow for Fellowship activities, or direct to the individual for full-time Fellows
Additional activities	<ul style="list-style-type: none"> ● Access to e-learning opportunities and resources ● Access to on-line interactivity between Fellows - the Fellows area of the website has been set up to allow this ● Individual meetings throughout the Fellowship with the CSLP Programme Team to discuss the findings and record the priorities ● All Fellows are required to keep a Reflective Learning Log, extracts of which are shared with the Programme Team

3 The Evaluation

This section outlines the overall aims and approach (**Section 3.1**) model (**Section 3.2**) and data sources (**Section 3.3**) deployed in the evaluation of the Clore Social Leadership Programme 2009-10.

The approach chosen is a multi-method, longitudinal approach, which will track the development of the CSLP over the first 4 years of its operation.

The main design of the evaluation is to be flexible (to shift alongside changes to the evolving Programme), part-formative (informing improvements to the Programme as it develops) and part-summative (assessing Programme impact).

The key methodological descriptors for this evaluation are as follows:

Qualitative and Phenomenological	Able to capture the richness of learning experiences for individuals and groups
Iterative	To capture the iterative nature of embedding learning from previous experience
Collective and collaborative	To draw together the learning within groups and wider systems
Inquiry based	To support expansive evaluation and learning, rather than deductive
Multi-layered	To mirror the experience and learning design of the Programme
Subjective	To value the subjective experience of Fellows, peers and other stakeholders
Grounded	In a 'baseline' understanding of individuals and the social sector – to enable consensus and comparison from which change has occurred.

3.1 Evaluation Aims

The evaluation aims to integrate evaluation processes into the Programme, rather than sitting outside the Programme design. This will enable it to become an additional skill learned by Fellows, as well as providing information for improving the Programme, and broadening the sector's understanding of appropriate evaluation techniques.

The principles for the evaluation approach are:

- To match the complexity, layers and individuality of the Programme itself - including both establishing baseline data through thorough mapping and deploying phenomenological, iterative and systemic approaches to the learning process.
- To map the changing territory of the Programme over time.

The following summarises the evaluation approach:

Underpinning research on the social sector	- Baseline of existing data on employment, leadership and key trends in the social sector
Establish baseline data	- Response to 360° feedback, and data from Leadership Development Plan for each Fellow each year
Developmental data	- Post-programme in-depth interview - Collaborative Inquiry for whole programme + wider system to capture and develop systemic learning for stakeholders