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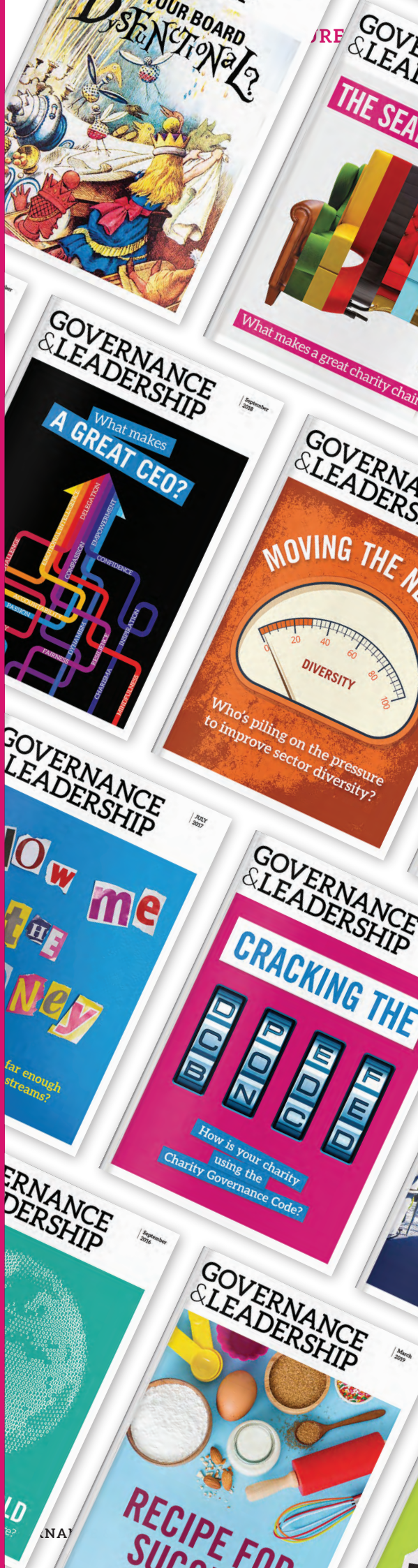
Interim Measures



CIVILSOCIETY media | GOVERNANCE &LEADERSHIP

Governance & Leadership Interim Measures

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Governance & Leadership Interim Measures

This guide brings together all the columns from Elizabeth Balgobin, charity sector consultant and interim manager, since her first column in March 2020.

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In the discomfort of diversity, magic can happen

Embracing diversity can be hard for charity boards, but that's no excuse not to do it, says **ELIZABETH BALGOBIN**

Yep, I'm the diversity hire and you've had to get all the way to the back page to find me. I'm not as learned as my predecessor, Andrew Hind, but I am experienced, inquisitive, acquisitive, always willing to ask a question and to share what I have learnt. I assume you to be engaged enough to want to share and learn together; you have paid a subscription and worked your way to the back page.

You probably therefore know the board diversity stats. The issue of diversity has been well rehearsed, it's in the Charity Governance Code and you have been asked to comment on it for the Code refresh. Yet, board diversity appears to be stuck. As Derek Bardowell said at last month's Race to the Top event (see p9), if you are indifferent you are contributing to the problem.

Board diversity appears to be stuck. If you are indifferent you are contributing to the problem

When we talk about board diversity we usually mean the things we can easily see and measure: race, gender, sexual orientation and visible disabilities. However, this risks tokenism and may not address the real risk of a lack of diversity: groupthink. I include socioeconomic level and diversity of thought when thinking about this challenge.

Diversity is intersectional; though that is not an excuse to ignore racism, sexism, ableism, homophobia and transphobia. Diversity is also uncomfortable and though we might put up with that in a large staff team, it can feel harder to do in the relative intimacy of a volunteer board charged with reaching a consensus on the strategy, the budget, the discussion about starting a new service or closing an existing one. Yet in that discomfort some magic can happen: you can move from thinking you are the experts, in charge of all you survey and leading the way, or from being custodians protecting your power base, to a board that is willing to take a risk, to recognise that you don't have all the answers or means to deliver the change you want but do have the humility and wisdom to understand that those you serve may have some or all of the solutions and simply need your support to achieve their agency for change.

Diversity leads to creativity and better decisions. It might even put the fun back into your Tuesday evening discussion of the staff engagement survey results.

So where do you start? Always with your mission, your service needs and whether you have the skills, knowledge and experience to deliver these. If you are in London and your board is entirely white you have to question where you are looking for new trustees – your local demographics matter. If you are a disability charity and your board is entirely without disabled people then you have missed 40 years of "nothing about us without us". Are you even discussing diversity at your meetings? Start there. Identify what you need to change before you start to recruit. Be bold, decisive and values-driven. Don't delay making decisions because they're too hard.

Recruitment is meaningless if you are not inclusive. What is your board image? Do you always meet in work hours, because the great and the good have jobs that don't mind them being absent for a board meeting? Or always in the early evening, making it difficult for those with childcare responsibilities? Do you have an induction process or expect people to join ready to start contributing? Is it clear and easy for people to claim expenses, including for childcare? A culture where it's clear that no one claims because they don't need to may mean someone who does need to feels they can't (and your true governance costs are not reflected).

Widen your search, selection criteria and the metrics you use to judge success. It's easy to see why my predecessor on this column was appointed to the Oxfam board or Nick Hurd to Access, the Foundation for Social Investment; only a handful of people have their professional experience and the skills and knowledge that have come from that experience. However, while I admire both these men I question whether diversity was considered, and if so, how it was applied. They both look like a good fit for what is already there.

Look at your succession planning. Can you sponsor or mentor someone into their first board role? Do you have term limits and will you step aside to create space for someone from a different background to step onto the board? Could you create a shadow board or open up sub-committees to new entrants? Take a look at Beyond Suffrage's trustee training programme for young women of colour, SignHealth's successful work on board diversity and Leap's new Dangerous Conversations in Safe Spaces training programme.

In sum, are you open to hearing different ideas and valuing different experiences? Embrace the discomfort and put diversity on your next agenda.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

This is your ground zero: use it to reset

Charity boards should use this once-in-a-lifetime opportunity to reset what they do, why they do it, and how, says **ELIZABETH BALGOBIN**

Oh, what a time we've all been having. As I write this we are still locked down, and many charities, social enterprises and other organisations have either furloughed some or all of their staff or are considering doing so. Not all, though. Some will have seen their financially fragile but much-needed small local charity endeavour suddenly thrust to the forefront of a national support effort to keep people healthy, safe, sheltered and fed.

Whether you have had to scale up delivery and seen a growth in funding or have had to close services and use government schemes to remain viable, you will still need to do your accounts at some point. There are good reasons to focus on your finances, both for the crisis now and the recovery after. When you do return to fundraising, you need to be in the best shape to secure grants and donations.

When the Covid-19 crisis hit in February and March, many of you will have been in the final stages of completing your 2020/21 budget. The finance subcommittee will have had one of its big set-piece outings, scrutinising the figures and planning for the end-of-year accounts and audit. No one could have prepared for the financial shock of a global pandemic affecting just about every business model: I will make a small personal donation to any charity that can prove this was on their risk register.

As the crisis has deepened with an extended lockdown period, indications that physical distancing may have to continue for the rest of the year and speculation that the sector will have no choice but to give up office space and change service delivery, it is understandable if you feel overwhelmed.

Finance teams as superheroes

Everything is up in the air, and with the constant reworking of budgets and cashflows, it is important to recognise the value of your financial procedures and the skills and time of your finance staff and committee members. It's an unassailable fact that you need good data to make good decisions. Finance may usually be parked among the less sexy back room functions, but right now it is your essential service and its inhabitants your potential superstars. It doesn't have to be fancy to be good:

- What is coming in and what is going out? Your cash position is vital now.
- What is restricted and what is unrestricted? Your ability to negotiate use of restricted funds may be more important than trying to secure a new unrestricted grant.
- What is essential and what can be cut back? Starting that new project or redesigning your brand might be able to wait. Do consider the impact on your supply chains, particularly where these are other charities or small companies.
- Have you applied for and utilised all available government Covid-19 schemes?
- Are you tracking the deadlines for submissions to things like the Coronavirus Job Retention Scheme to ensure money arrives in time to make payroll?
- Are you working closely with your fundraisers to track which emergency funds you can apply to, and tracking receipt?

Funders are working hard to try and ensure the sector has (some) of what it needs to survive now. Some are offering immediate extensions to grants that are ending and you need to be ready with your current management accounts not to miss those opportunities.

Your 2019/20 report and accounts are vital for your future funding. They form a large part of the due diligence of whether to fund you or not. Your story of what you were able to achieve before this crisis should be accompanied by what you plan to do in the year ahead, and how you are preparing to do it. You will build on this in detail in your 2020/21 report and accounts.

Creating a budget for 12 months is probably unrealistic, so get comfortable with creating three-month budgets and cashflows for the next six to nine months. All of this will add to your story of this unusual year and help you set out why you are a viable going concern.

> The Charity Commission has offered the option of delaying filing for three months but I urge you not to take up this option unless you have absolutely no choice

The Charity Commission has offered charities the option of delaying filing for three months, but I would urge trustees not to take up this option unless there is absolutely no choice. Getting these accounts right will set you up to be able to plan out this year ahead – and the one after that. You will be able to get ahead on thinking about how you present financial years where the usual comparisons will not work. You will be able to use this once-in-a-lifetime opportunity to reset what you do, why you do it and how, by being specific about how this crisis affected what you do and the adjustments you had to make. This is your new ground zero: keep what is precious and unique to you and those you seek to serve.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

Have we been more Leon or Wetherspoons?

Trustees must take responsibility for the decisions made during this crisis, and make amends where necessary, says **ELIZABETH BALGOBIN**

The trouble with having the back page in a bi-monthly magazine is that everything I write about you will have seen in the intervening months. In the era of rolling 24-hour news, every angle is covered at pace – the story, the reactions and the reflections. This can mean that ideas that seemed great in the morning are already immaterial by the afternoon.

Way back in January I asked people what they would like me to write about and I created a plan. Well, we all know what happened to plans for 2020. I had begun speaking to people in February about the relationship and balance of power between the chair and CEO; then the Alzheimer's Society/Samaritans story broke at the end of February. My article could still be relevant and my opening line was written. Then lockdown happened: chairs, CEOs and boards had more urgent matters to attend to. But now, I feel the importance of that crucial relationship is regaining relevance, so I will revive the topic.

I have looked on in wonder and with pride at CEOs moving rapidly to change their charities, to step up delivery at the same time as managing their own household crises. I have marvelled at chairs rolling up their sleeves to work through the implications and trustees embracing more frequent meetings and making swift decisions without the usual information. Relationships have changed – board members and executives have been invited into each other's homes, dressed more casually, perhaps having a drink as they meet. Some are stronger than ever before; others have called a truce on long-running issues to get through this crisis. I have worked with a small number of boards, with trustees who are older or have health conditions, that have taken the difficult decision to begin the process to close. Coronavirus has exposed their organisational vulnerability to crises, far too reliant on one or two board members and unable or unwilling to retire them.

The power of CEOs, good and bad, has also increased. Whatever we say about the role of the board being strategy and the role of the CEO being the delegated implementation of that strategy, most of us know and accept that the CEO writes a strategy that they present to the board. It is rare for it to be a truly co-produced affair. I know, and have experienced, boards that have vetoed work that the CEO felt was the most important, or insisted on advancing work that was just not ready to be the new flagship for the organisation. In most cases, we muddle through this. In some, we witness the organisation failing as the strength and health of the CEO/chair relationship becomes weaker and more toxic. This is usually when someone like me steps in and either tries to repair that relationship or picks up the pieces from the fallout.

The other trend crossing my email and Zoom is workers feeling compromised and bullied. I have heard stories of furloughed workers being asked to continue to work, at greater pace, for the good of the cause. We know this is against the rules, risking not only the reputation of the charity but sanctions that might risk its very survival. I have listened as people have asked how to cope with bullying, one person using the term "coercive control" and another describing a level of racism I had hoped never to see in the sector. Those workers have friends and networks that will judge your brand. The fact that they are scared of losing their livelihoods creates even more imbalance and tension.

The return to normal may lead to faultlines cracking open, to burnout, to accusations of disloyalty if you raise that problem with the CEO you were building up to. Can we wipe the slate clean and all start again? Probably not. What inequality have we built into the system by the decisions we took? What was put on hold? Have we been more Wetherspoons (refusing to continue paying its staff until it received furlough payments from government) or more Leon (coordinating delivery of free daily hot meals to NHS critical care staff)?

> The inevitable review of this crisis is not just for government: we should review our own responses too

Rebuilding will be important. The inevitable review of this crisis is not just for government: we should review our own responses too. We all make mistakes, but are we adult enough to admit, apologise, fix and move on with a renewed sense of purpose with fairness and equity at the heart of all that we do? Forgiving is hard but forgetting is almost impossible.

I heard a quote recently that has stuck with me: the culture of an organisation is set by the worst behaviour a CEO is willing to tolerate. I'd add that that can be extended to include the board. Boards unwilling to tackle the worst behaviour of a CEO are not protecting their charity, their brand or the people they seek to serve and those who work for and with them. The CEO's name will be remembered (and reported). As trustees, you need to step up before your names too are remembered not for the good you did, not even for the bad, but for your inaction.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

Ethics isn't only about money or reputation

Active consideration of what is right and what is wrong should permeate all our charities' decisions, says **ELIZABETH BALGOBIN**

Trustee Exchange Online put together some great content last month. I attended the ethics roundtable on day one and despite my perennial best intentions to not talk too much, I was so stimulated by the conversation I not only spoke (too much) but ended up saying I would write something. It may end up being several somethings.

I am not an expert on ethics (I watch The Good Place and have deep conversations with my nephew reading philosophy at Manchester) but I have strong views around values, principles and ethics. When one of the roundtable participants said that their charity's ethics are in the values they publish, my response was that ethics and values are not the same thing – while definitely linked, they are not the same. I realised I had no real basis for saying that, so later I scoured the internet and found something that sums up what I meant: *"Values are our measures of importance, whereas ethics represent our judgments about right and wrong,"* from Paul Chippendale at Minessence Values Framework.

I have never written an ethical framework or policy for any of the charities I have run or worked with as a consultant. I suspect most of us haven't. I am a little ashamed that it has taken me this long to realise that I need to explore what would be in an ethical framework to ensure that my charity not only delivers its objects but delivers them to achieve equity, diversity and inclusion. Because a value about being evidenced-based doesn't stop us from cherry-picking evidence sources to confirm our existing bias. Efficiency as a value doesn't stop us from cutting corners. We spend hours in awaydays on values, yet we assume we all share the same ethics for our chosen charity.

The only times we seem to have a conversation about ethics is when it relates to money and reputation. We might examine whether our investments are ethical, or public opinion might force us to take a closer look at our major donors, or our roots. I'm not pointing the finger here – it's exactly what I did when I started to think about how to write about ethics. My notes from the roundtable have highlights around: "Oxfam and sex workers", "Sackler and the V&A", "RSPCA and court cases about wills", "Comic Relief and Stacey Dooley", "Statues and Twitter black squares for Black Lives Matter".

I need to explore what would be in an ethical framework to ensure that my charity not only delivers its objects but delivers them to achieve equity, diversity and inclusion

I then saw the panel debate about whether charities ought to align their investments with their charitable objectives, following up on the open letter sent by 55 charities to the Charity Commission and the Attorney General in March 2019 requesting clarity on the CC14 investment guidance. I had to examine my own ethics here because there is a small part of me that has a bit of sympathy for William Booth's line that "the only problem with tainted donations is that tain't enough of them". I also take the point made by the wealthy arms-manufacturer father of George Bernard Shaw's idealistic Major Barbara character that poverty is worse than munitions. My own muddled ethics wants good jobs that do not hurt the planet, people or animals and good charity for those that fall through the gaps. I do not shop with some brands, and I extend such buying decisions to any charities where I have a budget but haven't had those conversations with the board or seen an ethical framework that would tell me what the charity's position would be on those decisions.

This issue of G&L focuses on fundraising and that is probably the most regulated we get on ethics, following the Olive Cooke case and the creation of the Fundraising Regulator. Your charity is probably following the Code of Fundraising Practice, you may even have read the Guide on Acceptance, Refusal and Return of Donations on the Chartered Institute of Fundraising's website. But do you have a policy or framework that sets out how and when to apply that guidance? P19 of the guide may help.

Grey areas exist and where we fail to get our decision-making and communication right, our reputations can suffer. These failures are what lead to pronouncements about loss of trust in the whole sector, in our organisations and in us as individuals. How many times do we read these stories and state that they are not about us? I've come to it late but I am now starting to think about the ethical framework I need to construct around safeguarding, bullying and harassment, whistleblowing, pay and progression, redundancies, inclusion... the list goes on. I can and do follow the rules, but now realise I have not been thoughtful enough about my ethical approach and have assumed those I work with share my views.

By the time you read this it will be almost October so let's join the American Association of Fundraising Professionals in earmarking October as Ethics Awareness Month. Read the blogs on ethics on the IoF site from last October to get you started.

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Interim measures

Apply the lens of EDI to hiring and redundancies

ELIZABETH BALGOBIN urges charities to carry out equality impact assessments when shedding staff, and not to sideline efforts to improve diversity

Everything I have written so far on this back page gig has come with a good dose of equality, diversity and inclusion (EDI), and one of the key themes has been recruitment through an EDI lens. Tania Mason covers this at the front end of your magazine (head there now if you have started at the back). For many of you it must seem odd to be talking about recruitment when so much of the sector is announcing a freeze on recruitment and redundancies, but there are still jobs out there and we should be recruiting well. This is even more important now than it was last year.

The level of redundancies across the sector puts all of us right in the middle of an EDI conundrum: how do we change the much-criticised demographic of our organisations and the sector when there are so many good candidates with recent sector experience of the current #CharitySoWhite demographic? I have been worrying about this since the Chancellor announced the furlough scheme.

The fact is that the sector is not just predominantly white, it is also low on disabled people and has valued a degree over other qualifications and experience for 20 years. Changing that takes time when it is business as usual, and I fear the long-lasting effect of this pandemic will be that we lose the diversity we have and bake in the monoculture for another decade. Decisions being made about roles at risk of redundancy started before the pandemic and were further embedded in decisions about furlough.

Much of the meagre diversity in the sector is located in the fat bit of the hierarchy pyramid; the group of people given fewer opportunities for development, in front-facing roles that have become unviable due to continued social distancing, and in support roles most likely to be replaced by outsourcing or technology. These are the posts that were furloughed early on and no one bothered to look at an equality impact assessment before making those decisions.

Some people may have been furloughed as they were shielding or had to provide care as support systems disappeared. What was an immediate compassionate response will have led to identifying ways to do things differently or deciding not to do them at all. What was seen as a temporary measure is now long term; many organisations see recovery taking two years.

The work to build back better starts with pollarding the sector trees and branches, leaving us looking a little stunted and bare.

> I fear the lasting effect of this pandemic will be to bake in the monoculture for another decade

We risk losing the new-found enthusiasm for diversity as too difficult to do right now. And there are those friends and colleagues we want to help move into the few jobs there are.

Diversity can't wait

There are no easy solutions. Every charity is making difficult decisions but I do implore you to think about what you risk losing in diversity of thought, experience and representation of the communities you serve. Make sure you do an equality impact assessment for your redundancies:

- How many people are affected?
- Do you know their protected characteristics?
- Does your proposed structure disproportionately affect those with protected characteristics and which ones?
- How does your proposed structure map against the roles you furloughed?
- Are selection pools fair? Are you really making your decisions based on actual skills and experience – or favouring favourites?
- Do you have diversity on the interview panels for selection pools?
- Do you have someone asking awkward questions that challenge your proposed structure and the processes you are using?

Delivering the best you can for the causes you serve means thinking about the people your cause serves. Are you at risk of doing unto them from a position of power informed by your lack of diversity? Everything you have seen and read this year should make you want to do better than that.

What can you do to ensure ongoing development for the staff you do keep so that they get opportunities previously reserved for the already most qualified? Can you create apprenticeship opportunities? I have an ambition for us to have an equivalent scheme to the 2027 Talent Programme (2027.org.uk) on the delivery side of the funding divide.

We cannot use the government's Kickstart job placement programme as a replacement for redundant roles, but we can consider how we bring young people in. Kickstart requires us to take on at least 30 young people: can we organise in our sub-sectors to become a Kickstart Gateway for placements? Getting £1,500 for each six-month placement won't help with the financial deficit but may help us with our long-term diversity deficit.

Are you bold enough to use the need to balance the books as an opportunity to build a better sector?

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Interim measures

Changing your mind – it's hard to do

ELIZABETH BALGOBIN has decided to stop getting angry about things she can't change, and instead to face the new decade with hope and positivity

I've changed my mind. It sounds such a simple thing to do – yet all the evidence of our recent history of polarised opinions demonstrates we find it very hard to change our minds.

On the day I write this, the Pfizer/BioNTech vaccine has been approved for use in the UK. We are still in the midst of Brexit negotiations, with New Year's Eve rushing towards us. It's also the week when a new commission has been launched to unleash the potential of civil society. Again. Our culture secretary, Oliver Dowden, admitted that government didn't really understand the sector at the start of the Covid-19 crisis and said the Office for Civil Society rationalisation will concentrate on strategy rather than delivery to achieve more (with less?). Our unpaid minister in the Lords, Baroness Barron, will do some work to leverage finance for us. I do hope this will be for the whole, brilliant, messy sector. The other Baroness, chair of the Charity Commission Tina Stowell, chose to start a culture war in the Mail on Sunday in urging the sector not to start culture wars. Then there was that choice to cut overseas aid. How do we make decisions when it feels like they will be used as political footballs?

It has felt like we have had the most difficult, stressful year, delivering more than ever with one eye on what our political and regulatory leaders might lob at us next. I know the emotional energy of this has been a drain on colleagues, at the same time as dealing with the strain of keeping staff and service users safe and deciding whether to furlough or not, close or not, make redundancies, restructure and/or make more changes to services. On the other hand, it has also been a year of unprecedented collaboration, innovation, introspection and growth.

So, I've changed my mind. I'm not going to rail against the dead cats I cannot affect. I'm way too lowly on the food chain for anyone to notice my ire, and I think most of the sector's trustees and senior leaders probably feel the same. The need to survive and to deliver takes up more than enough time and energy. Instead, I will praise the Charity Commission staff for moving quickly at the start of the pandemic, issuing guidance, being flexible about submission deadlines and now producing their new short finance guides. They did a sterling job assessing and registering new charities during the pandemic. These are the things that boards and managers want, and I want the Charity Commission's £1m budget increase to be spent to support that good work. We have the hope that the sector will be heard and that the new chair will have a better understanding of the breadth of what we do.

I'm not going to rail against the dead cats I cannot affect

Polarisation is the suppurating wound we all need to heal. It doesn't matter whether you voted for or against Brexit, we all have to live with the actions that followed that vote and deliver our services to meet the needs of our users, along with the protections for our environment. The voices we need to listen to are our service users and supporters. Every aspect of society has been affected by the pandemic; I fear that young people will carry the trauma and financial burden for decades. We must deliver our missions for them and for general public benefit.

New questions and challenges will arise. At some point someone will suggest that we should expand our social media to include the newcomer Parler. Someone will suggest that we change our asset portfolio to divest from whichever fund is deemed unethical now. Someone will suggest that everyone that was furloughed should be made redundant. We can have brave, honest conversations about what works and what we need to stop doing.

The stories we tell about our charities can make us look like hero saviours instead of charity workers. Presenting our histories in a vacuum might be convenient but complexity should be explored. Marie Stopes changing its name to MSI does not deny that Marie Stopes pioneered family planning in 1921 but it does reject her racist eugenics beliefs.

At the start of this year there was another polarised debate I found myself taking a public stance on: does the decade start in 2020 or 2021? I was firmly in the 2020 camp. I have changed my mind. As you read this in January 2021 let us start the decade reaffirming our commitment to our causes. Let us collaborate and use our collective energy to make our case for a proper allocation to the Shared Prosperity Fund, the Levelling Up fund, whatever the changes will be to the National Lottery funding allocations and, just maybe, the long-awaited dormant assets. We can use our time to turn our diversity and inclusion statements into practical actions, like recruiting new trustees that will shift those stats from 8% diversity to 30% or more. Let history judge us as activists able to change our minds for the good of all society in all its messy complexity.

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Interim measures

The #NotJustNCVO posts were mainly women describing sexism and misogyny

ELIZABETH BALGOBIN reflects on the challenges facing women in leadership positions and concludes that representation matters

March is Women's History Month, with International Women's Day on 8 March. This year the theme is #ChooseToChallenge: A challenged world is an alert world... From challenge comes change.

As young as the year is, it has provided us with many challenges already, and for our sector, historic and current leadership decisions and actions have been in our thoughts around bullying, harassment and discrimination. The #NotJustNCVO Twitter posts on my timeline were predominantly women describing sexism and misogyny and racial discrimination. I have been reflecting on my own experience of being a woman in a leadership position in the sector and what I have witnessed for other women.

> It took decades to get one woman, Millicent Fawcett, approved for a statue in Parliament Square

How we think about leadership is gendered. Men had the positions and titles of leaders; women's more participative style or the soft leadership that focuses on communication, compassion and empathy is viewed by some to be weak compared to task-driven leadership models that can focus on sticks instead of carrots. Women's internalised oppression and the misogyny we experience from men and other women can leave us feeling like imposters, not good enough for leadership roles.

My experience of being called a silly young woman, bound to make mistakes, on taking up a significant CEO role when I was 39 illustrates how we can be viewed, before we have had the chance to prove our worth in the role. I cannot imagine a 39-year-old man moving into their fourth CEO-level role being called silly, but he may have gravitas conferred on him. I have been called bossy, strident and hysterical; I've yet to hear any of the men I have worked with called "testerical" when exhibiting panicky behaviours – at best they have been "stressed".

Times are changing but the idea that it is only women that land senior roles these days, genuinely expressed to me several times over the last five years, proves that it is not job done.

So what can we learn from different leadership styles? How do we use a wide range of skills and experience to achieve transformational leadership, regardless of gender? Any search for gendered leadership traits will give you lists similar to these:

Male: assertive, passionate, deductive, task-oriented, interested in how, forceful.

Female: creative, collaborative, passive, process-oriented, interested in why and possibilities.

Developing your strategy or working through a problem needs a mix of these traits. Asking "why" should lead to asking "how". Every task needs a process, and collaboration and passion aren't mutually exclusive.

We all know leaders without the title that can make or break a project or organisation. Recognising those leaders and getting them to work with formal leadership cedes some of the power to achieve the common goal. When those opportunities are extended to women – Black and Asian women in particular – we begin to see change in the pipeline for senior roles, in the language we use and in the example for girls and young women looking for their role in the world.

Representation matters, which is why I have been reflecting on the women we see on plinths up and down the country and the story about proposals for Margaret Thatcher's statue rejected for Parliament Square by the City of Westminster. I am sure it comes as no surprise that I was and am not a Thatcher fan and have never modelled my leadership style on hers. But, she was our first woman prime minister. She has a statue in the Members' Lobby in the Houses of Parliament, but her public statue has been approved in Grantham in the middle of a pond to deter vandals.

There are 12 statues in Parliament Square. It took decades to get one woman, Millicent Fawcett, approved and erected. Her stand cleverly does have 55 women's and four men's faces and I am glad to see it in the Square. Yet Churchill chose where his statue would go and it was unveiled in 1973, eight years after his death. This year is eight years since Thatcher died but it feels like we have much further to go before we will see another woman in Parliament Square. Shall we start a campaign for it to be a third-sector woman, waving the flag for transformational leadership? G&L

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

Privilege is hard to give up

ELIZABETH BALGOBIN muses on the trustee's remit of "eyes on, hands off" and how this manifests in the sharing of power and privilege

I have been thinking about power – who holds it, how it is used and what blocks some people from having the agency to exercise it. Over the last couple of months, there have been times where I have felt utterly powerless and frustrated in some areas of my professional and personal life and other times where I became aware that I had more power than I should have.

I know my role as a board member is to individually and collectively share the ultimate responsibility, set the strategy and tone to deliver the objects and safeguard the charity's assets and reputation. It is a big job, but we don't do it in isolation. We delegate authority to paid staff and/or volunteers. So how do we, individually and collectively, ensure we are not exercising our power in such a way that those working with and for us are not equipped to make good decisions and deliver on them and are not so disempowered that they are frustrated, angry or worse, disengaged?

> The desire to be useful, to "fix" the problem and be the heroine can be hard to resist

One of those areas was working with a client on trustee recruitment. They did a brilliant job with the recruitment ad and outreach, which I hope we can share with you all in due course. They received over 50 applications, which is surprising enough, but a significant number were from Black, Brown and other racially minoritised people, from younger people and from people meeting specific skills needed for that board and its organisation. It was one of the most rewarding things I did in March. We asked candidates to tell us about their approach to a governance role, and one described their understanding of being "eyes on but hands off".

The phrase struck a chord with me as I know I can struggle to keep my hands off. I suspect I am not alone, particularly if one does hands-on work elsewhere. The real struggle is to hand over real power to someone else: someone who might do it differently; someone who might make a mistake. The mistake might be significant enough that you, the board, have to take responsibility and intervene.

We have hard and soft power in our board roles. I find myself sitting on my hands and trying to judge when my question or comment will be useful and will not prevent someone else from offering their view. I also try not to engage with pre-meetings where the decisions are made and presented as a done deal or those post-meeting discussions that sometimes take place to undo the decision the board made. These treat some as more equal than others and are an exercise in exclusion.

When I work with boards and senior leadership teams it is usually because some level of communication is failing and preventing them from making changes on their own. If I am not careful then I can end up with the power, as my reading of the situation drives the actions. Yet I almost certainly do not have the full picture, and I will not be there if the actions fail to deliver. But the desire to be useful, to "fix" the problem and be the heroine can be hard to resist. Privilege is hard to give up.

I spend a lot of time at the start warning people against trusting everything I offer them. Whatever the intervention, if they do not own the solution and develop the confidence to deliver it then my work will have failed. My eyes and ears have to be on, but my hands must resist the urge to just do it all (because it will be quicker and easier). Instead I must guide that team to their own productive solutions. I can use my power and privilege to ensure that those who do not get the chance to speak are given the space for their voices, knowledge and experience to be heard, disrupting the status quo and allowing new boundaries to become established.

The seven Nolan Principles can act as a guide: selflessness, integrity, objectivity, accountability, openness, honesty and leadership. Good leadership shares power. Shared power can achieve more for the team, for the organisation and the cause you serve. It requires awareness of your individual and collective leadership styles and a commitment to building community and individual growth. It does not mean you give up your responsibility, but it does mean you stop yourself from doing it all or sending someone on a fully-paid guilt trip for not doing it your way.

As the Wonder Pets sang: "What's going to work? Teamwork!" They saved a (cartoon) baby penguin with that attitude.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

Good leaders promote good meeting hygiene

ELIZABETH BALGOBIN shares her checklist for ensuring meetings are purposeful and effective

It has felt like the pandemic created the perfect conditions for everyone to want to say something about meetings. Comedian David Mitchell had a three-part series on Radio 4 in March, and we all followed the drama of Handforth Parish Council.

In the rush to keep up to date and meet often, we may have lost sight of what meetings are for

My frustration with meetings means I've been thinking about them too, trying to work out why we had so many, why so many people kept turning up to them and what they achieved. I have concluded that quite a lot of meeting attendance, and possibly even purpose, was to be "in the room where it happened". No one wanted to miss something that might be important later.

In the rush to keep up to date and meet often, we may have lost sight of what meetings are for. There are lots of types of meetings, and what we call a meeting can set out its purpose – or hide it. If you are invited to an interview, you have a clear sense of the purpose. If you are invited to a consultation meeting it may be seeking your input to solve a problem or it might be an information-sharing exercise. You may believe your attendance means you are able to negotiate and input but discover you do not have an opportunity to speak, or that anything you do say is not considered.

There are lots of advantages to meetings: managing information, sharing ideas, making decisions, preventing problems, getting to know people and getting emotional support. But you have to be clear about the purpose of the meeting and do the basic meeting hygiene.

Good leadership understands the importance of meeting hygiene. It shows respect for participants, which builds trust. It recognises engagement and the contribution to outcomes. It remembers the financial cost of holding a meeting, and the emotional cost. It motivates and energises, ensuring disagreements are welcomed to achieve change. It sets the tone, invites everyone to contribute and leads to actions and decisions. I have a mental meeting hygiene checklist:

- What is the purpose of the meeting? Is it to solve a problem, to inform, explain or present ideas, generate buy-in and seek co-operation, review performance, reach a decision, give feedback, or build a team or solidarity? It may have more than one purpose.
- What type of meeting is it? This is about the terms of reference and participants as well as deciding the best format for the purpose.
- Who chairs? This might be a formally elected chair, separate from the meeting host. How closely do they work with the meeting host? Both chair and host might determine who actually turns up of those invited. A prestigious host and/or chair might attract attendees (I think of this as meeting snobbery) but poor hosting and/or chairing will leave them disappointed. Chairing tightly to meet time constraints may miss the point of the meeting but chairing too loosely may mean everyone is frustrated and nothing is achieved. Chairing is a skill worth developing.
- Who creates the agenda? This is where you communicate the purpose and parameters for the meeting. A seemingly boring agenda may hide some exciting work and decisions. Who should communicate the purpose and is that separate from the agenda?
- Does the meeting require papers and who writes them? I favour a template that indicates whether the paper is just for information or whether a decision is needed.
- Deadline for papers – I am a stickler for sending papers out seven days ahead of the meeting to allow people time to read them.
- Does the meeting require minutes to be taken? The person who writes the minutes or the notes has a lot of power. I know of one organisation that is undertaking a large evaluation of the minutes of every meeting that it had during the pandemic. I suspect some voices will not show up at all because they were not captured in the minutes.
- Is there an agreed code of conduct for the meeting? This might help to manage poor behaviour by setting the tone.
- Is there room for some fun or socialising? Before online meetings we used to have a chat over a biscuit. Checking in and building relationships is important.

People make a meeting but good hygiene helps to ensure the weary attendee wants to be there for more than just being there.

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Interim measures

Didn't we do well?!

Charity people should feel hugely proud of their efforts over the last 18 months, says **ELIZABETH BALGOBIN**

I recently updated my professional photos, as I have thing about misrepresenting myself. I had a bit of a shock. I know I gained a lot of weight during lockdowns I and II (maintained in lockdown III) and I know my hair had grown a lot. What I see when I look at the new pictures is a saggy, wrinkly person with patchy skin: it's much easier to see my age and the effects of the pandemic on me.

Our sector, like most, has had a hard pandemic and I am sure some organisations will be looking a bit saggy and patchy. We are individually and collectively tired. It has not been 18 months but 18 months squared. As I look at the current me, I have made an effort to remind myself of everything I achieved. Every wrinkle was earned supporting individuals and charities, or in joining the push to make the sector more diverse and inclusive. I am proud of what I achieved. I am also proud of some of things I have witnessed in the sector. Here's a little reminder of some:

Look at your wrinkles and remember what you achieved

Volunteers

People volunteered in numbers and ways we have never seen before. RVS mobilised people to support the NHS, collect people's prescriptions and then to get the jabs done. Voluntary Matters received the furlough volunteers and matched them with charities. Blume, an agency for older freelancers, matched their pool of pro bono talent with charities in need of help. People volunteered locally, through newly created mutual aid groups, faith organisations, foodbanks and local infrastructure bodies. Experienced, but busy, sector people volunteered to assess grant requests to get money out quickly. It all took enormous logistical co-ordination, while developing and changing the technology and ways of working to make it possible and as safe as possible. You did well! Look at your wrinkles and remember what you achieved.

Collaboration

London Funders moved fast and gathered together their membership to pool funds for distribution. Before long, funders outside of London joined their resilience fund. The first London Funders meeting I attended back in 2004 discussed how to get to a common application form. It never happened but some funders did start funding joint projects. The pandemic has moved this forward with many funders agreeing to accept a standardisation of key information.

Funders also moved faster on the diversity, equity and inclusion (DEI) agenda, with decisions to create and allocate funds specifically for Black, Asian and racially minoritised ethnic people and organisations. The DEI Data Group agreed a shared taxonomy for data collaboration. Some have employed people and organisations to put a spotlight on their processes to ensure they improve what they do and how they give.

The national infrastructure organisations met several times a week to share information, co-ordinate work and campaigns and to meet with central government. I saw more joint work, agreement on where to differ, and trust built in that time than in all my decades of infrastructure work.

I witnessed and worked on collaboration with frontline organisation that also compete with each other. Their focus shifted from trying to do it all themselves to finding the partnership that would meet the needs of people on the ground. Long may all of these collaborations continue and bear fruit. You did well! Look at your wrinkles and remember what you achieved.

Activism

The pandemic laid bare the inequities of our society. Long-running campaigns to address the needs of homeless people were given a boost by Everyone In. Hotels were funded to take in rough sleepers while organisations worked together to make it happen and to tell us that it was always a policy and resource choice to leave people without the basic need of a secure home.

George Floyd's tragic murder combined with the disproportionate death rate and health inequality experienced by Black and Asian people to highlight systemic racism. Organisations like the Ubele Initiative, the Runnymede Trust and CharitySoWhite kept the message clear and front of minds.

There are more examples, too many to mention here. You all did well! Look at your wrinkles and remember what you achieved. We build here from a new baseline.

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Interim measures

Recruitment decisions are choices

Sector efforts to improve diversity don't always appear aimed at achieving genuine change, laments **ELIZABETH BALGOBIN**

Recruitment decisions are choices. We choose the metrics we use to decide who we consider appointable. When we choose to appoint someone we already know, that is a decision to maintain the status quo.

The prime minister and government have been criticised for choosing a buddy to oversee their ethical conduct. Their justification is that he was the best person they saw from the 173 other applicants. The explanation of why he is the best is never going to be known; we will speculate and watch to see if our thoughts on this are correct. The same is true for appointments to charity sector boards and senior roles in the not-for-profit sector.

> You need to be in this for the long haul, not the quick win...DEI roles are springing up everywhere, which makes me nervous

If a Black or Brown person is appointed, there are whispers that it was a token appointment. I have heard people say out loud that "of course it went to a woman". The appointments are to be celebrated for the change they can bring; for the choice made to step out of the comfort zone of appointing someone you know.

I am not seeing the same level of choice made for d/Deaf and disabled people. As Acevo's Hidden Leaders report showed, d/Deaf and disabled chief executives are generally found in specialist organisations for disabled people. The same has been true for most Black and Brown people at chief executive levels; it's how I started my chief executive career too.

Commitment to the cause and bringing your lived-knowledge equity will be a big part of that reason; but I believe the second-guessing whispers, the constant pressure to be the representative of your colour, your disability, your gender, and the expectation that you will conform and behave like those you have replaced all go to make the role and the work less joyful.

We are at the start of the conversation about education and socio-economic backgrounds of CEOs and board members. We need to consider intersectionality in our appointments, but we really need to be clear that the person appointed is trusted to be able to do the job. nfpSynergy's research report, How Do Minority Ethnic Audiences Engage With Charities? (February 2021) shows that volunteering levels among minority ethnic groups are considerably higher than for the general public – 32% vs 21%. Why are we not seeing this level of engagement and participation at board-level volunteering?

We can only break the myopic perspective of the closed environment by being honest, having uncomfortable conversations, identifying our problem areas and doing something to fix them – before we invite people to join our boards, volunteer and staff teams. You need to be in this for the long haul, not the quick win. Diversity, equity (or equality) and inclusion (DEI) roles are springing up everywhere, which makes me a little nervous. If they are very time-limited, with no budget and reporting to someone in HR, then I question whether the recruiting organisations are just window-dressing change. This approach can be potentially exploitative of the person appointed.

Opening the closed environment at board level can be achieved by making a conscious decision to change the structure and actions of your organisation to view all that you do through a DEI lens. What does it mean for your work if you centre it on achieving equity and inclusion? At the National Emergencies Trust, the board decided that some established members would stand down early and there would be active recruitment for diversity. This created space to build a board where a third of its members are now visibly diverse. There's further to go but it started with a decision to create an equity working group (now the equity scrutiny group) early in the pandemic.

You can start by reading some of the guides: Getting on Board has a resource bank; Reach Volunteering has the Trustee Recruitment Cycle and the Chartered Institute of Fundraising has the Change Collective EDI Recruitment guides. You can read blogs and reports from the Ubele Initiative, the Runnymede Trust, Inclusion London, the Social Mobility Foundation or follow someone such as Helen Bevan of NHS Horizons for her round-up of practical ways to make change. It is all free and available online. You just have to be willing to put in the time to learn and have the desire to turn that into action.

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Interim measures

It's the bit of grit that makes the pearl

Genuine diversity of thought requires boards to embrace healthy conflict, says **ELIZABETH BALGOBIN**

I've been doing this governance and leadership stuff for a while now, but what people want me to do with them is diversity and inclusion – as if they are two distinct things with little or no crossover. When charities ask me to work with them I always ask how they use the Charity Governance Code and whether they review their actions and behaviours against it. I cannot claim it is a statistically valid sample but I would say about 80% have not looked at the Code.

I try to build a picture of the charity through desk research, interviews and surveys. If I ask individual trustees if they have seen the Code, most will claim that they have. When I dig deeper and ask how they use the Code, I usually find that they do not see it as an active process. A search of board minutes rarely throws up a discussion of the Code.

> You won't be surprised to hear that most boards are not comfortable with conflict and do what they can to avoid it

Section 6 of the Code's refreshed equality, diversity and inclusion section says: "The board is more effective because it reflects different perspectives, experiences and skills, including, where applicable, from current and future beneficiaries." I am convinced that charities are more effective at meeting the needs of the people and causes they serve if different perspectives, skills and experiences exist across the organisation. I will ask about diversity in the organisation, specifically at board and senior leadership level. Again, not statistically valid, but I would say about 75% will tell me there is diversity of thought. That's a good thing, right? It is a phrase that should tell me that different perspectives, coming from a range of experience, knowledge and skills, are heard and considered. However, whenever I am offered that line, it is often from people who look and sound very similar, and share similar career success. Sometimes I hear it from people who look different to the rest of the board or leadership team, but share other characteristics and experience. I ask people to tell me about a time when they have considered a different solution and hear back similar language, and sometimes the exact same phrase, from half of them.

Attitudes to conflict

I ask people how comfortable they are with conflict in the organisation. I don't mean shouty exchanges and fisticuffs, but genuine adult debate of differing perspectives on an issue. You won't be surprised to hear that most are not comfortable with conflict and do what they can to avoid it and close it down.

I use conflict, which is a very loaded word, to try to elicit where there may be genuine diversity of thought. I hope that someone will say "We didn't have a fight but there was a robust discussion about this service and as a result we decided to try something X had suggested". That little bit of grit that leads to a pearl can be more productive than everyone agreeing with each other. But usually we are likely to roll our eyes, try to shut down the conversation or talk about it outside of the meeting, behind the backs of the gritty contributors. We offer a simulacrum of inclusion with such behaviour; the person on the outside knows it to be false and feels less included than if they had been properly heard and their point rejected after genuine debate.

Different thinking styles

We all have a preferred thinking style. My dominant style is interpersonal; yours might be analytical, strategic or organised. We might look and sound the same, have similar career success, and have different thinking styles and so believe that is more than enough to ensure diversity of thought. Using an ongoing public debate, what if you never have the thought that losing £20 a week might have an impact on someone's life? Your analytic thinking may have looked at it only from your lived frame of reference where £20 is earned in five or 10 minutes (or much less!). Your strategic thinking may have focused only on the reason to make the cut. Your organised thinking may frame the effect as something to be managed by the person losing that money. Even my interpersonal thinking may only think about it in terms of my gifts or donations to others. We face hundreds such examples daily where similarity fails the diversity of thought test.

Put the Code on your next agenda and discuss how your board can be more effective. What do you have to do to achieve truly different perspectives? Ask yourself what healthy conflict could achieve and the consequences of maintaining the status quo, and unhappy consensus, for your current and future beneficiaries.

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Interim measures

The power of negative thinking

Facing up to failure is key to achieving success, says **ELIZABETH BALGOBIN**

I can come across as a bit of Cassandra; you know, that cursed Trojan priestess who prophesises disaster but is never believed. Or, a Negative Nelly, pointing out problems and at risk of sucking the fun out of things. Negative thinking generally has a bad reputation, but I characterise my negative thinking as "being realistic" and the key element in the successes I have had. I felt vindicated when I caught the Abandon Hope episode of Oliver Burkeman's Radio 4 series The Power of Negative Thinking. The whole series offers a strong case for us Nellies.

I have a strong belief that I, and others, learn more from our failures than our successes. I believe we need to be brave and seek out feedback on our failures, using that to strengthen the things that went well and rework the things that went wrong. That is not easy as an individual leading an organisation or climbing the ladder to that leadership position. Leaders are judged harshly for their failures.

Likewise, it is never easy for an organisation to fail. There are so many eyes watching for failure: boards, funders, members, competitors, other stakeholders, sometimes those we work with, and now, perhaps more than ever, government. This level of scrutiny, and the risks associated with failure, can prevent us from doing the very things that could make a difference, big or small.

This is nothing new. As long ago as 1999, I co-authored a report with Ceri Hutton which evaluated a large funding programme. We called the report Burying Failure, Smothering Success, a title that essentially summed up how the programme operated.

One of the reasons I enjoy evaluating projects and programmes is unearthing those hidden successes and finding the lessons from failures. The thing that frustrates me about evaluation is that I see the same failures repeated, as recommendations are not implemented and the people delivering and receiving the service are not heard. I am not doing anything particularly special when evaluating a project; I am utilising active listening skills, distilling what I have heard, read and witnessed, and providing an assessment from my perspective. It is easier to do this as an outsider – I may never see the client again – but I rarely have the opportunity to see through the implementation.

> What I observe in my work across the sector is that people are afraid to give genuinely constructive feedback

Giving constructive feedback

What I observe as I work across the sector is people wanting to present the positives of success with little investment in the time it takes to think through failure, and people afraid to give genuinely constructive feedback. Is there a manager out there that has not heard of the feedback sandwich – start and finish with something positive and confine your criticism to the middle of the conversation? Yet, many wait too long to deploy their feedback. This way, it is easier to bury the failures, or promote up and out so it becomes someone else's problem, or create workarounds to mitigate the failure you know is coming. By the time you reach the point of taking decisive action to correct things, it has become a disciplinary matter that comes out of the blue for the person being disciplined. Boards do this with each other and the CEOs they manage, and CEOs and other managers do it with their staff and volunteers.

The Radio 4 series led me to read the blurbs about two books called The Power of Negative Thinking, one by Tony Humphreys in 1996 and one by Bob Knight in 2013. The gist from these previews is that insight into our relationship with negative thinking makes us better decision-makers. Knight was a basketball coach and talks about preparing to win by looking at the challenges. Humphreys is a psychologist and talks about personal growth. My take-aways from the radio series and these previews is that we have to stop treating failure as a reason to humiliate people and we all need the humility to admit when things are not working and the courage to step in and make the changes to fix it – or admit we are not the right organisation/person to do that work.

If we operate with kindness (see Carnegie UK Kindness Leadership Network and Kinder Communities reports) and an open, non-judgemental mindset toward the Negative Nellies, we might prevent some failures and really deliver change with a good balance of risk and fearlessness.

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Interim measures

This May, let's say 'Yay' to positive leadership

ELIZABETH BALGOBIN explores some traits of positive leadership, but urges readers to be honest about the negative ones too

Way back in November 2021 I embraced the idea of "No"vember. I turned down work that didn't interest me and focused on the things I really wanted to do. At the time I vowed to make May my month for saying "Yay", with the intention of fully engaging with things I would normally avoid. I invite you to join me, using the concepts of positive leadership.

> I know that managing by chocolate started as a way of me understanding what was going on in my organisation

There are seven or eight leadership styles, agreed by the non-existent World Leadership Council, defined by the type of person you are (your traits) and the type of leadership context you might encounter. Four are positive styles: the visionary, who thinks big and is future-focused; the coach, who focuses on getting the best out of others; the affiliate, who offers an appealing good-time experience; and the consensus leader, who encourages many views to reach an agreed way forward. The reality is that a good positive leader will draw on all of these styles, and sometimes some of the ones considered negative.

I am sure that every leader reading this thinks they are positive leaders. Board members, giving up their spare time in the certain knowledge they have a big vision, have set clear goals and offer support to their leadership teams to achieve them. CEOs and team leaders are certain they know and care about their people, that they encourage honest feedback, and never blame but work with their colleagues to find solutions everyone can work with. Positive leadership has one central theme: know yourself.

It sounds simple, right? It should be, no-one knows you better than you know yourself. And yet, I know I can ignore my less appealing traits and convince myself that my version of "leading with love" is trusted by everyone because I am authentic – and because I connect with others through managing by chocolate. In my more honest moments, I know that managing by chocolate started as a way of me understanding what was going on in my organisation. It gave me a chance to spend a couple of minutes with each person at their desk as they chose their chocolate from the box and we had a quick catch-up. But they didn't know when I would be offering chocolate and just because I had decided I had the time and inclination to chat, it was not always the best time for them. Knowing myself would mean adjusting my approach.

Authenticity is a positive leadership trait. Another is the ability to energise your people through encouragement and by setting a vision and goals for excellence. Gosh, excellence is a big scary aim, especially when resources are tight. However, focusing on the opportunities that lead you toward excellence is much more achievable – no-one climbs a mountain in one leap. It also links to two other traits, resilience and agility. An agile leader adapts to the circumstances, using new and old ways of doing things, and maintains the energy (or resilience) of their people by harnessing the collective strengths of everyone involved; being strengths-based is another of those traits.

Embracing the negatives

Now, I hate to slip into some negatives here but please know this is a good-faith prompt for you, dear leaders, to get to know yourself. How good are you are communicating your vision, the goals and behaviours you want? Think about those times when you believed you had been inspiring, setting out everything you wanted, and yet what you got back bore little resemblance to the vision. Did you blame your colleagues, or did you see it as a failure of your communication? Were you able to encourage people to offer their best or did you instil a sense of fear and distrust? Did you enable people to grow and learn in a stimulating environment? Did your colleagues feel accountable and that they could trust you enough to offer genuine challenge and their best ideas? Or, have you tended to offer non-constructive criticism, or worse, to harrumph or sigh and just re-do it all yourself?

Positive teams perform better because they trust those with the power to lead them with authentic good faith, being the rainbow in their occasional grey cloud. In May, let's say "Yay" to optimism and positive leadership.

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Interim measures

Permissive paths and desire lines

ELIZABETH BALGOBIN invokes a long ramble to ponder on what demotivates employees

Out on a longer-than-planned walk with friends, I noticed all the different ways we could conduct our walk, and my mind went on its own wander about how to use this to manage and motivate teams. In the week before that holiday walk, I had read that research indicates that employees are most concerned about "soft" issues when engaged at work, but when they decide to leave because they feel demotivated, they will cite the "hard" issues, such as salary, for leaving.

> As managers we create systems and processes to run our organisations, but we all know our colleagues do not always follow them

Back to that walk and what I noticed. Like most walks, we started on streets connecting us together from our different locations. We navigated a busy road connecting the village to the larger town, followed the signs and ended up on a permissive path. In case I've lost you here, a permissive path is not the same as a public right of way, but a route a landowner allows you to use. Wiki amusingly says "sometimes marked with a signpost but often the only way you know you're on one is by spotting its orange dotted line on an Ordnance Survey map". Ours was signposted and included sections that are public rights of way. Then came the exciting bit – desire lines – the feature that got my mind whirring about those soft issues that might be causing demotivated employees.

You will know a desire line (or desire path) when you see it. It is that shortcut path visible by the erosion of grass and soil created by people who find that the constructed path takes too long to reach the destination or where there is not a constructed path to get there. Desire lines are the "fix" the crowd creates to a problem.

Well, that's a nice ramble but what's your destination, I hear you ask (while considering taking your own desire line and stopping reading). Very simply, as managers we create systems and processes (our constructed paths) to run our organisations, but we all know colleagues don't always follow them. Some colleagues are given tacit permission to ignore systems and processes, and others find workarounds without permission. Our processes are things such as strategic planning and setting objectives, measurement and control measures including appraisals and policies. Our techniques for bringing it all together are communication, team meetings, all-staff events and reviews. We create our own countryside codes in our staff handbook and financial procedures regulations. When workplace relationships go wrong, we may be at cross purposes because managers refer to the codified constructed path, but do not acknowledge the permissive path we have allowed for some (those with the organisation's Ordnance Survey map and its magic dotted lines) and come down hard on the desire line that has been followed. We do not stop to question why the desire line exists.

Keeping people motivated

People can be demotivated by many factors: lack of career progression, values not aligning, feeling undervalued, conflict or poor leadership. As we face the current recruitment and retention challenge, alongside a cost-of-living crisis, two of the big demotivating factors come to the fore: lack of flexibility and unrealistic workloads. It is easy to fall into a mindset that there is nothing we can do about this, as there is not enough money to pay people more, need is increasing and the priority is for everyone to pull together to meet the immediate need. It is harder, because it is time-consuming and requires a change mindset, to redesign your systems and processes with the people who created the desire lines in your organisation.

Talking to the National Trust ranger we met on our walk, they told me about allowing some desire lines to exist and closing others to keep people on the permissive path and right of way. I asked why they allowed any desire lines when the purpose of the permissive path was to protect the wildlife. Simply, the desire lines gave them information about how people wanted access. A desire line might become a future permissive path, or provide information to create a stronger deterrent to protect the environment.

Next time you are out on a walk around your workplace, have a look at the routes people take through your systems and procedures. Be honest about the desire lines and permissive paths you use as a manager through those same systems and procedures, and get to work on identifying what needs to be codified to protect your environment.

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Interim measures

The 'rithm is gonna get'cha

ELIZABETH BALGOBIN relates her own social media journey including learning how not to be a slave to the algorithm

As Gloria Estefan and Miami Sound Machine almost sang: "There's no place that you can hide... Ooh baby the 'rithm is gonna get'cha". Nadine Dorries asking Microsoft to "get rid of algorithms" isn't entirely misguided, if we take it as a naïve, in-the-moment verbal slip. Those algorithms are written by people with a purpose which we mere users do not understand.

I created an alternative profile and started following right-wing, anti-immigration, pro-Brexit accounts

More than a decade ago, I saw a New Yorker Dogs cartoon where one dog said to another: "I had my own blog for a while, but I decided to go back to pointless, incessant barking". It struck a chord with me as I was reading a lot of pointless, incessant barking blogs and, worse, people were telling me I needed to join in. I held out until the year I turned 50 when I blogged on Tumblr about the 50 things I had not yet done (the account was set up by a young person and I don't know how to archive or delete it – it lives in the ether forever). Now whatever one writes is considered a blog and I am guilty of using my LinkedIn account to post odd bits of writing.

My big dive was joining Twitter in 2013 for a column about whether trustees should be on social media. I was chair of Voice4Change England and realised that I didn't know what we were putting out on social media, or who we were reaching, and we had not had a board discussion about our media strategy and reputational risks. Many charity sector social media accounts are run by fairly junior colleagues who are often offered little guidance and can be the first ones to read the hateful comments. What we say on our own accounts can be used as "evidence" for judgements from real or bot commentators of our worthiness as trustees and CEOs.

I now restrict my social media to LinkedIn, Twitter and occasionally one other site. I am fascinated by the posts and products that appear on my feeds, but it is the people-watching that keeps me gripped. This is where those pesky algorithms come in. How I use each site means I get different things on each and exposure to different types of people.

Towards the end of 2014, I realised I had not been listening to all the voices in all the communities using the services of the charities I was involved with. So on one site, I began engaging with people I would never normally meet as a trustee or CEO. I was hearing beliefs and opinions that were shocking, almost unthinkable, to me. My Twitter feed, on the other hand, was reinforcing my world view (with occasional kittens and puppies) and I could not understand how I was not seeing these other views there – until I acquired a very basic understanding of algorithms.

Then I did something that almost broke me. I created an alternative profile, not linked to any of my regular devices. I started following right-wing, anti-immigration, pro-Brexit accounts, liking and reposting some posts, and watching who was engaging. I knew the Brexit referendum would be close because I saw both nuanced, reasonable arguments and horrific images and misrepresentation of people of colour. Whether you support Brexit or not, it was a strong campaign. It used tactics I am unlikely to use for any charity campaign, but it was powerful and those tactics are now commonly used by politicians and others. They know their tools and understand how to use the algorithm to amplify their message.

My top tips

You've already had great advice earlier in the magazine, but here's my tuppence-worth:

- Decide who you are online. I have shared a lot about myself, include my mental health history, and mix professional with personal interests. I am political, but not party-political, because all my work is affected by political decisions. I don't post TikTok dancing and I over-use GIFs.
- I delete about 70% of my posts at draft stage. If in doubt, heed Eco Sister's voice, "Emmanuel! Don't do it!" (check that one out on TikTok if you are stumped).
- I have been stalked, so rarely post live-location stuff. Are you safe posting where you are?
- Follow some people you disagree with to step out of your algorithm bubble.
- Mute people and key words when you need to preserve your sanity.

The genie is out of the bottle, but I have learnt a lot from people all over the world and I find new things to frustrate and fascinate me each day.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

I wonder about our hidden lives

Even "expert" trustees can – and probably should – bring lived experiences to the table, says **ELIZABETH BALGOBIN**

When our esteemed editor informed me that the theme of this edition is lived experience on boards, I thought about writing something on the number of requests I have received to help boards find lived experience and explain what it means. I managed to stop myself from saying "phenomenology" and singing it to the tune of the Muppets' "Mah na mah na". Wearing my evaluator hat, I'm interested in people's stories – or, in phenomenological research terms, I want to understand the meaning of their experience to them, how that influences their behaviour and choices, and the knowledge they have gained from their experiences.

In a world of snap judgements and polarised opinions, we can fall into thinking that the part we see is the whole. In recruiting for trustees with lived experience, we might talk about them as experts by experience and want them to come with a very particular experience – for example, of poverty, ill-health, race, gender, sexuality or difference. We take one aspect of their experience and can make it the whole. Their knowledge and truth, local and partial, must stand for everyone with a similar profile. They are asked to represent, and what a burden that can be.

I have used "they" deliberately. We risk othering those we seek with lived experience.

> Getting to know more about your board colleagues, appropriately and safely, may just open up new ways of looking at your issues

All knowledge is local, all truth is partial

The American author Ursula K Le Guin has influenced my thinking for 50 years. What started with wizards and dragons at the age of eight led to examining class, racism, feminism, the climate crisis and trans inclusion. The internet will offer you a quote for everything; this from Le Guin's Five Ways to Forgiveness stories has guided my thinking over the last couple of years:

"All knowledge is local, all truth is partial. No truth can make another truth untrue. All knowledge is part of the whole knowledge. Once you have seen the larger pattern, you cannot go back to seeing the part as the whole."

I believe it is vitally important for lived experience to be present on the board. The stories that inspire us are about using lived experience to make a change, to stand up, to deliver a service in a way that the professionals did not, and could not, imagine. If I hear the name Kristen Hallenga, I immediately think of Coppafeel. I assume its board has others with lived experience of breast cancer to offer a different perspective to that experience, but I do not know.

Experts in one thing or another

Boards are serious things that ask for knowledge, skills and experience in serious things such as finance and safeguarding. Sometimes you learn these on the job; sometimes you come with a big CV full of things that make you the expert. But I can't help wondering about our hidden lives; the lived experience we probably do not share when we get the "expert" profile. I have been asked to be on boards because I will add colour to the board. I will get the invitation based on my work and I am never asked about my other lived experience because I now fall into the expert category.

I am confident that I bring my lived experience to the choices and decisions I make for the charity. I might assume my board colleagues know about my lived experience as I am that TMI – too much information – person at whom people inwardly roll their eyes. But I recently realised that over the years most board colleagues would not know about my experience of poverty, debt, ill-health and abuse. And I do not know theirs. I usually only see the part they present as an expert.

Opening up to others

No one wants full disclosure of every aspect of their lives; we are careful about the elements we share and we are entitled to privacy. We talk about doing board skills audits but what is the skill we are trying to capture for "I grew up very poor but we survived because council housing was affordable"? Getting to know more about your board colleagues, appropriately and safely, may just open up new ways of looking at your issues. I may start adding my lived experience to the "other" box on the next skills audit, and I encourage you to share your relevant hidden lived experience too. Not all of it, of course – that really would be TMI.

***Elizabeth Balgobin** (@Balgobinthinks) is an experienced charity interim manager and trustee*

Interim measures

There is a useful life beyond the identity we grew in our last role

ELIZABETH BALGOBIN signs off from her three-year stint as this page's columnist with a reminder that endings pave the way for new beginnings

I think about endings a lot – good endings and painful ones. I think about the beginnings and whether those endings reflect the promise, or turbulence, of the beginning. I have had a lot of work-related endings, and I have witnessed many more. In my more youthful CEO days, long before becoming a senior temp, I decided that I should not stay anywhere longer than seven years. I had seen too many CEOs and board members that had been in post for over a decade, or decades. I watched and listened as their colleagues talked about them, worked around them and adored them. I saw the power that accrues by staying and becoming the elder statesfolk of the sector. I have talked about fixed terms for CEOs, or at least a more robust review to ensure that their power does not become absolute by dint of a permanence their fixed-term board cannot achieve.

I was working on an issue where a senior person was spent, but insisted on keeping going

The last year gave us two great examples of endings from the world of tennis. Ash Barty, retiring at 25, told us that she had told her team "multiple times" she was ready to go: "I don't have the physical drive, the emotional want, and everything it takes to challenge yourself at the very top level anymore, and I just know that I am spent." Hearing her on the radio stopped me in my tracks as I was working on an issue where a senior person was spent, but insisted on keeping going. Our causes deserve better than someone worn out, out of ideas and losing credibility. I was also thinking that as a CEO or board member you are rarely afforded the same duty of care as anyone else in the charity. Barty has gone on to become "chief of inspiration" for Optus, an Australian communications company, saying: "I decided to prioritise Ash Barty the person over Ash Barty the tennis player, and in doing so I've realised I can help so many more people through my charity work." There is a useful and rewarding life beyond the identity we grew in our last role.

Roger Federer's retirement as the grandmaster at 41 felt like a very graceful and gracious exit. He left at a point when he still had a desire for challenge but his knee injuries made him reflect on his emotional want: "Tennis has treated me more generously than I ever would have dreamt, and now I must recognise when it is time to end my competitive career. But at the same time there is much to celebrate." How marvellous to end with such self-awareness, securing your legacy and goodwill. More of that, please.

An essential element of being a senior temp is planning your ending and preparing people for you being there for a short time before handing on to someone else who will upend things. It is my view that temps, like fish, begin to smell and should not outlast their sell-by date. It is easy to do when you like the organisation, the cause makes your values and aspirations tingle and you get on with the board and the staff. But you were employed to do something specific and time-limited. Preparing the way for what comes next has become second nature to me, it sits alongside my commitment to honour the opportunities I have been given by paying it forward to someone else, someone new or overlooked.

I have been slowly reshaping my life. I have been working for 40 years and now I spend more of my life reading other things and writing essays, as I finally get qualifications. Being a temp was always supposed to be a very temporary thing, but has now been a third of my sector career. I now return to a partial level of permanency as the new CEO at the Bowlby Centre mental health charity, alongside bits of consultancy.

When I accepted this gig, I was upfront that I would do it for a couple of years. In my third year, I'm beginning to smell (and the page label, "Interim measures", won't make sense now). This is my last back page. I hope you have found something useful in my musings, maybe something to help with your governance and leadership new year resolutions, beginnings and endings. Thanks for having me. G&L

***Elizabeth Balgobin** is CEO of the Bowlby Centre and a charity sector consultant*

G&L thanks Elizabeth for being so generous with her wisdom and insight over the last three years, and wishes her all the best in her new role. For a PDF of all Elizabeth's columns, subscribers should email subs@civilsociety.co.uk.