

## **A Year of Change**

After 13 years as CEO of ACOSVO, Pat Armstrong gained agreement from ACOSVO's Board for a two month period of extended leave. Pat and her husband David had planned their adventure together, and set off to travel far and wide, while Pat kept friends and colleagues posted on her blog 'The World is my Office....Not'.

The Board and staff made initial plans for Pat's leave, setting out clear roles and boundaries. Systems and processes were put in place for cover, and while Pat would leave a gap for a short time, the whole team felt confident and capable to cover the period.

As many readers will know, Pat and David's plans didn't work out well. Early into the adventure, David took seriously ill and had to be rushed to hospital in Christchurch, New Zealand where he underwent major surgery. Once he was well enough to travel, David flew home to Scotland where, after a relatively short battle with cancer, he died in August last year. Pat returned to work at the beginning of October 2016.

At various times throughout 2016, Pat needed to take time off work, firstly to care for David throughout his illness, then as a result of bereavement.

The following reflections from various members of 'team ACOSVO' have been captured to co-create 'Lessons Learned' from an organisation working together through a difficult time.

## **Planning for the Unplanned**

While the initial period of leave had been well planned, the need for a further two periods of extended leave over the year (six months in total out of one year) were unplanned and at short notice.

Meg Wright, ACOSVO Convenor points out that “the initial time spent planning was useful when everything went pear-shaped and the holiday of a lifetime turned into something else altogether. It gave us all confidence working with each other to re-define what was needed and agree the route forward”.

The Board recognised quickly that, with Pat needing to take further time out, and with the uncertainty surrounding the particular circumstances, additional capacity and support would be needed. The additional capacity came in the form of interim support deployed on consultancy agreements for specific roles.

## **Reaching Agreement**

A number of important conversations took place with staff internally and between staff and Board. As plans developed, gaps were identified, and 'consultants' were brought in for particular areas of expertise. The consultants both had previous experience as third sector CEOs, and knew ACOSVO well. Conversations and agreements with the consultants also helped the team:

- Come to terms with uncertainty becoming the norm.
- Play to people's strengths and areas of expertise.

- Think about what the organisation needed most.

Meg highlights that forming the agreement between ACOSVO and consultants “was very useful as everyone knew their role and parameters. It allowed staff to take on additional responsibility and work more closely with the Board. It also allowed the Board to get greater insight into the workings and relationships within ACOSVO”.

Andy Dey, Director of Operations and Development at ACOSVO identifies that discussing and reaching agreement is “essential in both the case of planned, and unplanned, absence, recognising that the unplanned can be more difficult”.

Andy suggests that when an organisation is facing an unplanned absence, it is “likely that some sort of external resource may be needed to supplement capacity” and that it “needs to be clear who has responsibility for what, how to coordinate effort, and who can make decisions”.

The Board agreed to bring in Jayne Stuart as a strategic consultant to provide interim leadership support. During the period of Pat's leave of absence, two additional full-time staff members left ACOSVO leaving a large dent in capacity in a small team so Emma Galloway was also brought in to run various projects and core activities. Jayne comments that “setting out the agreement really helped me focus on the level of input and support needed. While this was a period of limited capacity, some great strengths exist within the ACOSVO team. I wanted to ensure I was adding real value to the team and maintaining a strategic support rather than becoming too operational or duplicating efforts made by the rest of the team”.

Meg comments that “what helped make it work was the Board agreeing quickly that Jayne could take the role and were supportive of the decisions taken. Everyone was in agreement about this, and that keeping roles clearly defined and lines of authority clearly laid out helped”.

## **Planning and Handover**

The planning and handover involved a number of people at varying points - Convenor, CEO, Director of Operations and Development, Director of Finance and the interim Strategic Consultant being most involved, and with other Board and staff members contributing appropriately.

Meg reflects “for me as the new Chair, it gave me confidence that ACOSVO would continue to thrive, and that key areas of work would be handled well. It was important to make sure the key stakeholders saw how we managed the situation, and that we still provided all the services we are funded to deliver”.

Jayne commented that for her the handover “was really important. This was my opportunity to get to grips quickly with what needed to be taken forward in Pat's absence. Pat being involved in this part of the process was a real benefit, and I felt even more confident once briefed by the full senior management team”.

Pat identified that it was helpful to keep communication channels open, but be able to opt out when (she) needed to, and that it was important to have “contingency plans in place”.

Top tips and lessons learnt:

- Do not underestimate the time it takes to plan and handover, particularly if external resource is being used. Even if the person coming in knows the organisation, this will take time.
- Ensure the team are kept abreast of what is planned, and how things will be achieved.
- It is important to reassure staff, particularly in relation to adequate resourcing.
- If you are facing a long-term gap - months possibly - recognise that it may be impossible to manage effectively without additional resource.

- Be realistic about what is achievable and be prepared to prioritise and re-schedule throughout the process.
- Support staff to be empowered and have the confidence to take decisions in line with delegated authority.

### **Knowing the Organisation.**

Collectively, a good level of knowledge about the organisation exists across the team, and where there were gaps in knowledge and understanding, people worked together to fill them.

Meg Wright points out that “it is important the staff all have an awareness of all the work,” but reminds us that the governance role needs to be safeguarded. As Convenor, Meg wanted to maintain a strategic perspective and ensure her governance role was fulfilled. “Before Jayne started, I felt I was needed operationally in a way that was not ideal - I felt I was involved too operationally at times. However, the experience has helped in my board role and a level of understanding that Board decisions have an impact on staff”.

Meg highlights that “the main gaps, from my perspective was in the outward facing areas of Pat’s work. Board members helped fill in most of those and continue to provide support as needed.....It also helped that Jayne knows ACOSVO so well and that she is well known and respected in the sector”.

Top tips and lessons learnt:

- It is important to keep sight of the differences in roles and responsibilities between governance and staff. It is appropriate and useful to have Board members involved in various aspects of the organisation, but not at the detriment of good governance.
- If external resource is being considered, it is highly desirable that they have knowledge of organisation.
- Even if an external resource has knowledge of the organisation some sort of induction is required.
- It is important to induct people into critical aspects of the organisation quickly to help them know the organisation. Understanding the culture and values - who you are and what you stand for as an organisation - is really important.
- It is crucial to get the right people to provide additional capacity. Good trust and relationships are also important to help build and support the team in difficult times.
- Personality and leadership style can be as important as the skills the person brings.

### **Strategy, Direction, Vision, Mission and Values**

Staying focused on key organisational aspects was very important throughout the period of uncertainty.

Meg believes “having a solid base with everyone knowing the strategy, mission, vision and values helped. There was no mission drift, and that is due to Pat providing clear messaging on this. Pat’s leadership was felt all along the way, and that helped keep people focused on vision, mission and values”.

Pat also recognises that the “processes we had gone through before, for example Investors In People accreditation, recruitment, strategic planning, all really helped and that these were well embedded in organisation”.

Jayne reflects that “being clear on strategy, direction, vision, mission and values really helped me feel confident and able to fulfil the outward facing role required of me, as well as support the senior management team. It really felt like I was helping a very steady ship steer itself safely”.

Caroline Christie, Director of Finance at ACOSVO adds that “it was key to have a calm and confident management of ‘external relationships’ throughout the period of uncertainty”.

Top tips and lessons learnt:

- It is vital an organisation sticks to its mission during any period of absence or uncertainty.
- It is important to recognise that the organisation is likely to be under stress, and therefore even more important that decisions are taken in accordance with existing strategy.
- Keep the eye on the big picture and don't get bogged down in the small stuff.

### **Working Collaboratively.**

Working together as a team, as well as working with partners and ACOSVO members, was a key to success. The feeling of support among people was very strong - particularly between the staff team and Board.

Meg felt “the staff had confidence in approaching the Board, but that comes from the way Board meetings are set up and the Board being genuinely interested in people and their work. I felt confident in the staff team knowing their job and knowing they would pick up the phone if they needed to”.

Andy points out that the Senior Management Team (Pat, Andy and Caroline) agreed at a recent planning day that “looking back, while all of us agree this was a difficult time, ‘pulling together’ in adversity enhanced team dynamics and presented opportunities for each of us to grow in confidence, be empowered and take additional responsibility”.

Top tips and lessons learnt:

- Working together as a team in adversity can be a positive experience.
- It is important to be aware of the risk of burnout, and be careful not to put too much on any single set of shoulders.
- Involve all staff and board along the way, and be clear about what is core and what is additional.
- It is important to maintain a ‘normal’ outward face while dealing with challenges internally.

### **Communications.**

As a team, ACOSVO planned communications with stakeholders (internal and external) to ensure the message was clear and consistent. Team meetings took place internally, where staff were kept up-to-date and took opportunities to share and discuss any areas of concern. Face-to-face meetings were held externally to assure partners and maintain confidence in the organisation. The cycle of Board meetings kept to schedule, and regular updates and communications were circulated internally amongst staff and with the Board.

Jayne points out that “it was really important to be upfront and open with people about what was happening and how we were dealing with it. It helped that I already had relationships with some of the key stakeholders and could build on the strong foundations that existed. While this was a difficult time, the organisation was, and is still, in a very strong position and it was important to communicate this”.

Meg mirrors this view, “I think the communications worked well,” and points to feedback she received at a meeting with Scottish Government shortly after Pat came back where it was mentioned that they were supportive of Pat and were complimentary of the way ACOSVO handled everything.

Meg suggests that “sending out a strong message was crucial and others had confidence in us to continue delivering”.

Top tips and lessons learnt:

- Ensure partners, stakeholders and members are aware of the change and how it will impact them.
- Ensure stakeholders are aware of who will be their point of contact.
- Communicate clearly and regularly, making people aware of who to go to if they have any questions.
- Maintain confidence that you have a plan in place, and have the people to make it successful.

### **Enabling, Enhancing and Empowering.**

Overall the senior team and other team members stepped up and filled many of the gaps and demands that the change presented. It was important that staff felt enabled and empowered to lead, decide and act where necessary. It was also important that they had support, challenge and back up when needed.

Meg recognises that the fact that the team were prepared for Pat's planned holiday helped (in the unplanned phase). She highlights that "it may not have all flowed so well if everything had happened unexpectedly and abruptly" and that there was benefit in having the planned contingency.

Andy acknowledged that "the Board were incredibly supportive at this time" but that it is important to remember they have limited capacity.

Top tips and lessons learnt:

- The burden of additional work should be shared as much as possible across the team.
- External resource offers good support where internal capacity is insufficient.
- Do not be afraid to speak up if things are not working or are going wrong as any plan is likely to need tweaking or adjusting. People should be encouraged to speak up from anywhere within the organisation.
- Be mindful of limited capacity across the team and Board.

### **Adding Capacity and Making Best Use of Time and Resources.**

With staff taking on more to fill gaps and demands, it was important not to duplicate or add unnecessary layers to the team. It was also important the additional resource was used in the best way possible at the level required, and that the budget was used efficiently.

The flexible time arrangement with Jayne meant she could step in as required. Jayne explains "depending on what demands were being made, some weeks I would work one day and some weeks potentially three or four. Our agreement was for a number of days in total, and I wanted to make sure these were used in the best way".

Top tips and lessons learnt:

- Try to ensure any additional resource becomes part of the team and is able to engage as much as possible in the normal communication and decision making cycles, while at the same time keeping the clear focus on their given tasks to avoid efforts being duplicated or impact diluted.
- Really familiarise yourself with your Board, get to know them well and do not be afraid to draw on their expertise

### **Focusing on Results, Objectives and Targets.**

The team kept a strong focus on results, targets and objectives, with senior managers supporting the wider team to do the same. This reflects the strong culture and practice that exists within the organisation.

Given the particular circumstances, and with a recruitment process for two new staff taking place throughout the period, discussion and agreement on top priorities helped focus on what could and couldn't shift. Overall, the team pulled out all the stops to meet the majority of targets.

Jayne took the lead on some targets and deadlines that Pat had held previously which could not be dropped in the timeframe. These targets and deadlines were made explicit at the agreement stage.

A top priority was to review the senior management roles. Jayne explains, "We thought it was important not to delay reviewing the roles and rewards for senior staff, particularly given the efforts the team were making at this time".

Working to the agreed schedule meant that this particular target was nearing completion when Pat returned. Jayne reflects "with good levels of Board input, and Pat's final review and sign off, we met our objectives and completed the review on time".

Top tips and lessons learnt:

- Keep top priorities in sight and be flexible with less pressing targets.
- Be realistic with results, targets, objectives. It unlikely an organisation is going to be able to achieve everything it might have done if there was no absence.
- Ensure the decision making team prioritise effort clearly.
- Be prepared to adapt 'on the hoof' and revisit earlier decisions if required.
- There is great benefit in everyone knowing what was expected of them regarding priorities, targets and objectives.

### **New approaches.**

Some new approaches and ideas were adopted throughout the period which have now been implemented more permanently. Whether these were areas that may have evolved without changed circumstances, or whether they were born of necessity resulting from input from different people, the acceptance of them going forward demonstrates an openness to contributions and commitment to improvement. This reflects the healthy leadership style and culture that exists within ACOSVO.

Meg describes one area of change being the Board becoming more active in supporting the outward facing work such as leadership dinners, network lunches, and key stakeholder meetings. This was introduced as part of the initial holiday plan but has continued as a contingency. One Board member now attends all dinners or lunches as a back-up to the CEO. Meg reflects "I think Board members have enjoyed this aspect and it has given them the opportunity to speak with members more which can help as part of developing the strategic direction and focus."

Pat has also identified the Board contingency plan for chairing events means she is getting better at saying 'no' and focusing on what will have the biggest impact. As part of this Pat identifies the "importance of staff moral and focusing on the team" as areas having greater impact.

Caroline finds that the flexible staffing model of having two trusted consultant relationships who can be called upon to help manage ongoing short term resource challenges and peaks is one that can be developed and maintained going forward.

Top tips and lessons learnt:

- Keep an open mind to new approaches and different ways of doing things. Different people will add value in unexpected ways.
- Create a culture and leadership style that encourages and empowers people to offer input for change and improvement.

### **Keeping Calm and Confident.**

Outwardly ACOSVO maintained a strong, credible and confident image. While the whole team were faced with challenges, work continued and feedback on activities from stakeholders remained high.

Meg explains that it was important to “stay calm and confident on the outside”. The whole team did this by talking to each other and making sure they were all up-to-date. The Board making decisions quickly by email without becoming overly involved operationally also helped.

Andy however does point out that “even with careful planning and the provision of additional resource, there is only a finite time anyone can keep paddling underneath. It's really important to beware of internal staff burnout and additional stress despite the outward calmness”.

“Working with the team really helped me stay calm and feel confident” Jayne reflects. “I knew that I would be given good support if needed and everyone was pulling together to steer us in a positive direction”.

Top tips and lessons learnt:

- It's better to focus on doing a few things well than spreading the team too thinly.
- Beware of internal staff burnout and additional stress despite the face of outward calmness.
- It's essential to prioritise, ask for help when needed, and be prepared to say ‘not right now’ if possible.

### **Returning CEO.**

The team worked together to support Pat back into work, recognising that everyone would need to work through a period of adjustment. Getting back to 'business as usual' was possibly no longer feasible as the 'business as usual' position had changed.

Pat's life had changed dramatically and her time away had taken her far from thinking about work. As Andy identifies “while a period of adjustment for a returning CEO will depend upon circumstances, looking back I believe we may have underestimated how long it takes to catch up, understand changing context and particularly rebuild relations with partners and stakeholders”. He goes on to explain that “on return, everyone (Board, Staff, Stakeholders and Partners) wants to catch up and re-engage but such a programme needs planning carefully. A returning CEO cannot be expected to slot straight back in with business as normal. A phased return or hand back of responsibility needs to be considered”.

Meg believes “the experience has let us see where strengths and skills lie, both internally and within our network. We have realised how much we depend on one person and taken contingency steps to make sure that if anything happened again, we would be able to continue..... I think it would be too easy to slip back into old habits and this is the challenge. It's important that we learn, and embed the changes we made”.

Meg has identified that it's important that there is support for Pat on an on-going basis as she adjusts to her new life circumstances and as she adjusts to staff coming ‘up to the plate’. Meg sees this as a good opportunity to reflect on why the CEO role is so demanding and see if there is a way for it to be less operational, giving more time for strategic focus.

Alongside Pat's absence, two new members of staff had been appointed, and a new team was being built.

Emma reflects back on this time and identifies that for her “there was something that really resonated about the theme of the ACOSVO conference this year – ‘Are we leader or are we human?’ I remember having a team conversation just before Pat came back and (how) it would work with new staff starting on the same day. I remember us talking and agreeing about the need to cut Pat some slack when she did return. While she is Leader, she is also very human and I think through the whole process this is one perspective that has shifted for ACOSVO”.

The Board were also keen to acknowledge and reward the commitment and hard work of others, as well as provide clarity to job roles, responsibilities and delegated authorities. The conclusion of the review of senior management roles offered a good opportunity to do this.

Top tips and lessons learnt:

- Give time to incorporate learning, reflect on processes and lessons learned, rebuild relationships and take on board new ways of working.
- An overlap of external support was very helpful in this period especially as staff will also need time to pause and regain replenish their energy.

### **Final Thoughts from a Returning CEO**

Pat's advice to other CEOs who have been out and are coming back would be:

- Don't expect to slot in to business as usual.
- Acknowledge the hard work done in your absence.
- Take time to learn what is different.
- Take time to rebuild relationships.
- Reflect on the learning both for the organisation and as a CEO.
- If people have grown in their autonomy, use that to your advantage and see what you don't have to pick back up – especially if they enjoyed it.
- Be gentle with yourself – especially if coming back from difficult circumstances – they did manage without you.
- It's a good time to re-think what is important and what both your own and the organisations priorities are.

