

Co-leadership

A step-by-step guide for Boards

This free guide offers an overview of the key issues and questions for Boards considering co-leadership and is based on my research and experience as a leadership coach working with organisations introducing this model.

You can find out more about co-leadership including case studies and free resources at my website I've created: www.coleadership.info

I also offer tailored coaching-based support packages and Action Learning sets for co-leaders – as well as consultancy support for Boards - get in touch to find out more about options and prices.



RESOURCE



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Before you start: is it for your organisation?

Co-leadership is an increasingly popular option across a wide range of sectors for organisations operating in complex environments where the breadth of experience and expertise that co-leaders bring offers a competitive advantage. Co-leadership also suits first-time CEOs and is considered to be a more inclusive model, which is particularly attractive to women, global majority and disabled candidates. Executive search consultants report growing interest from applicants.

It is not however a quick fix to a lack of diversity at senior levels, and it not suitable for all leaders or all organisations. Nor is co-leadership is an easy option: candidates need a high level of leadership skill and experience to be able to work collaboratively. Co-leaders are best appointed together – it can be hard to achieve the equality required if a new co-leader is appointed along an existing leader – so a move into co-leadership involving an existing employee/ leader requires extra care.

Not all boards will be in a position to support co-leadership effectively. The chair will need experience and capacity to mentor new leaders and to support transition if this is a new model for the organisation, as is often the case. Board members, or funders, may have concerns about co-leadership, including how it works practically, the potential for conflict, and the cost. Others may have reservations about power sharing or part-time CEOs. Concerns may also arise from previous poor experiences, or second-hand accounts, of failed co-leadership.

Key considerations

The chair needs to be committed, capable and have capacity - this is not an option for an inexperienced chair, and it useful if they have CEO experience themselves. The chair will also need the capacity to provide support, and ideally be committed to serve at least 12-18 months beyond the arrival of co-leaders.

The board needs to be committed to changing its leadership model - the full board and wider stakeholders need to understand and support co-leadership as any reservations can derail co-leaders if this leads to excessive scrutiny. The board is encouraged to carefully consider the risks of co-leadership as well as the many benefits, and discuss their plans with the wider stakeholders, including how any risks would be managed and potential implications for any existing roles. But remember: whilst the short-term risks might seem high, in the long-term the rewards are far higher.

Consider flexible working - co-leadership can be a more inclusive model and works well on a part-time or job-share basis. It will greatly increase the quality and range of applications if you advertise clearly that flexible working is an option.

Review the vision and values - as in any leadership recruitment situation, it's important the organisation's vision is clear and guides its selection process.

Support you may find useful at this stage

Seek external specialist advice early in the process: a HR adviser or executive search consultant can help you think through the options and maximise the range of potential applicants.



Recruitment: creating space for co-leadership

As with any recruitment, don't expect to replace like-for-like, you'll need to review the role of the departing CEO. The organisation's needs are likely to have changed over time; long-serving staff have often adapted to role to suit their strengths and you also need to take account of availability of candidates and shifting expectations around hybrid working and flexibility. Many cultural leaders are systematically over-working too, so the current role is unlikely to be achievable within contracted hours.

To be effective co-leaders need to have shared vision and values, aligned with the organisation's own. Roles need to be clearly defined, with reporting arrangements and individual responsibilities outlined. Co-leaders usually have a mixture of shared and individual responsibilities. Individual co-leaders need the authority to act in their areas of responsibility, and ability to act unilaterally in a crisis.

Applicants for co-leadership roles may not have worked together before as co-leaders, as it is not yet a common model. Evidence suggests that this is not a barrier to success; as long as co-leaders share values and vision, and possess the necessary leadership skills, highly successful co-leadership relationships can be formed between strangers. Applicants are also likely to include first-time CEOs and if you attract global majority, women and disabled candidates they may have gained their experience and skills in freelance roles or less traditional career paths, including beyond the cultural sector, due to systemic discrimination. Candidates may be hesitant to propose flexible working arrangements due to previous poor experiences so it is advised to proactively encourage this through the recruitment materials, if you wish to attract the widest talent pool.

Key considerations

Keep the job description realistic - review the job description and person specification carefully. Check how many hours your outgoing CEO has been working regularly in case the role is over-ambitious. Focus on the most important parts of the role, rather than creating a wish-list of everything you might need, as this will discriminate against minoritised candidates and narrow your talent pool.

Be willing to take a flexible approach to find the best candidate – keep your options open and be willing to consider a range of models depending on the candidates who apply and whether they might work best as a solo CEO or co-leaders. One experienced chair advised: *'always go with the best candidate, or candidates. Be imaginative and prepared to take risks and to make it work.'* Don't expect candidates to have all the experience required to do the role, before they've had the opportunity to do the role.

Allow capacity for overlap in job-shares – a minimum of one-day per week is typical for a senior job-share role, and whilst it is possible to operate job-sharing with no increase in hours this is not optimal.



Explore how co-leaders propose to share responsibility - don't expect co-leaders to have resolved every aspect of how they will work at interview stage, but they should know where they expect to work together and their respective lead areas. Boards considering co-leadership can often focus on practical considerations, but the advice from experienced chairs and recruiters was to avoid this: “*focus on the vision and don't get bogged down in the practicalities*”. If you want to discuss arrangements, allow longer for joint interviews so you have enough time to also fully explore their leadership potential and vision.

Be transparent - in the recruitment pack clarify the full range of options you are willing to consider and the maximum budget. For example, candidates might want to know whether the salary budget could cover a 1.2 FTE role, allowing for job-sharing on a 3-day week.

Allow choice for both parties - co-leaders ideally apply together and select one another. If there is already one co-leader in place, there needs to be an opportunity for candidates to decide whether they wish to work together.

Assess for co-leadership competencies and compatibility - co-leaders need highly developed collaborative leadership skills to work effectively including excellent emotional intelligence; self-awareness, the ability to build trust and empathy. They need to embrace difference constructively, and be masterful collaborators. They should ideally possess a wide range of different experiences, expertise and skills between them, but share values and vision.

Make sure the selection panel is qualified to assess the candidates – as well a diverse range of people on the panel, ensure you have experience of job-sharing or co-leadership in the mix, as well as panel members with experience of leadership and qualified to assess the competencies involved.

Build in support from the outset - any first-time CEO will benefit from well-structured support including mentoring, training and coaching as well as regular informal supervision and periodic performance management and development review with their line-manager. Executive recruitment specialists recommend the conversation begins at offer stage, so new leaders feel supported from the outset, and boards are advised to budget for external support.

Support you may find useful at this stage

- ✓ Inc Arts offers online resources that can support planning for and delivering inclusive recruitment.
- ✓ External executive search and recruitment specialists can advise on designing the role and the selection process, as well as assist in attracting candidates.
- ✓ Many organisations invite external panel members to augment the experience, and diversity, of the board for leadership recruitment processes.
- ✓ Relevant training, e.g. unconscious bias, should be offered any board members involved in recruitment and selection.



After appointment: supporting co-leaders to thrive

Leadership transitions can be unsettling for staff and when a new model is involved, internal and external stakeholders alike may initially be unclear or feel concerned as to how things work. Some stakeholders may be sceptical and seek to undermine either the individuals or the model. Residual concerns from previous poor experiences of co-leadership, or doubts about power-sharing and part-time CEOs, can derail the building of trust between boards and co-leaders and lead to scrutiny with insufficient support.

All organisational leaders need support, although there can be a tendency to assume CEOs don't need line-managing. Leaders who are 'The Only Ones' (a term Gaylene Gould has used to describe the only global majority staff in an organisation) or first-time CEOs may need additional support. During the transition the chair will need capacity to advise co-leaders and champion them with internal and external stakeholders who may be unsettled or need reassurance. Occasionally co-leadership relationships may encounter difficulties, if either party under-performs or lacks the competencies required, or if differences emerge in terms of values or vision.

Key considerations

Agree roles and ways of working - co-leadership is often a new departure for the organisation, so taking time to clarify how the arrangements will work including defining individual and joint responsibilities, communication protocols, how to handle disagreements, and how co-leaders will work with the chair and other staff is important. This agreement may need to be refined later, but clarity at the outset is useful for all. All leaders need clear performance targets and opportunities to discuss progress. As co-leaders are jointly accountable they usually share objectives and meet the chair together to set and review targets. The chair is advised to meet both co-leaders together regularly, on a weekly or fortnightly basis.

Champion the model – the chair may be required to champion the model with staff, and external stakeholders. A new leadership model may impact other senior staff, and the chair has a responsibility to ensure how any changes impact other staff is discussed with them before co-leaders arrive in post.

Avoid doubling-up – whilst there will be situations which involve both co-leaders, typically Board meetings, strategy development, working with the senior leadership team, the temptation to expect both to be involved in everything needs to be avoided. Experienced chairs caution against the impulse to invite a second opinion from the other co-leader. External and internal stakeholders may need reassurance initially that both individual co-leaders have authority to act as CEO.

Be supportive and avoid over-scrutiny - boards need to be careful not to micro-manage, as this behaviour undermines trust and can cause more problems than it solves. Having appointed co-leaders, the board should be asking itself: what do we need to do to support them, rather than how can this go wrong? The board may wish consider creating task groups or sub-committees to support the co-leaders better.



Be prepared to intervene - whilst co-leaders should be expected to hold one another to account and resolve their differences, this does not absolve the Board of their responsibility for performance management. If either co-leader is under-performing or conflict begins to develop between them it is essential the board intervenes quickly.

Be fair and treat co-leaders equitably - boards should avoid treating co-leaders inequitably and this extends to pay, conditions and contractual arrangements, as well as informal behaviours. Wider research suggests Executive Directors receive far more scrutiny than Artistic Directors from their boards, whether from a deferential approach to artistic leadership or because boards feel more confident monitoring fundraising performance than artistic quality. It's important co-leaders, who are jointly responsible for the organisation's success, receive similar levels of recognition and challenge.

Support you may find useful at this stage

- ✓ An experienced chair, with capacity, can be well-placed to mentor the co-leaders, although external mentors and the independence offered by leadership coaching can also be helpful.
- ✓ Offering pre-emptive joint coaching to facilitate an initial 'co-leadership contract' to include how to handle disagreements, with regular review sessions (eg quarterly) to support building the working relationship.
- ✓ If tensions arise between co-leaders external mediation should be considered, and if this cannot be resolved then the Chair is responsible for deciding a course of action.

