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Julian Stanley, "Coaching Through a Strategic  
Development Process in a Charity: Integrating individual  
and group coaching with team process to drive change"

## Coaching Through a Strategic Development Process in a Charity: integrating individual and group coaching with team process to drive change

Julian Stanley

[**Editor's Note:** Some details in this case have been changed to protect anonymity.]

"There are three essentials to leadership: humility, clarity and courage."  
Fuchan Yean, Cha'n master (A Japanese form of Zen)

### Introduction:

This essay is a reflection on the impact of coaching a group of three senior female health sector charity trustees. The work took place during a strategic development process where I was a consultant and coach. It resulted in behavioural changes at board level which led to the charity reinventing itself and introducing major governance changes. The insights I gained have gone on to inform my work as an executive business coach.

### Background:

The initial impetus for coaching the three trustees was born out of their desire to find ways to have their voices and ideas fully heard on a male-dominated trustee board. They also came forward to express their support for the vision I shared with the Chairman & leadership team to modernise the charity, make it more relevant to a new and wider audience of health sector employees and secure its long-term financial future.

The Chair, in the final year of his tenure, recognised the trustees were mired in various conflicts of interest and loyalty, due to the strong affiliation to the various trade unions who nominated and appointed them. To be an independent charity free from political interference, required a new approach.

Two of the three women who came forward were retired and in their mid-seventies. One had forty years expertise in early years health education, the second, fifteen years' experience as a clinician & the third a university academic & medic with significant experience of trusteeship gained as a NED. All three women were union activists. Behaviourally, two of the women often fell silent in meetings, vocalising their frustrations outside of the board room. The third, although vocal in meetings, was considering leaving the board due to an unwillingness on the part of several trustees to make difficult decisions. My proposal for a detailed business review of services, people, processes and to explore the options for developing each of the business entities in the group had recently been agreed. The need now was for a strategic plan to address a mid/long-term funding gap. Change was in the air.

The three women trustees accepted my offer of two individual coaching sessions each in between six group sessions. The Chair joined for the final hour of each of the group sessions with the three women. We used this time to plan our approach to implementing the business review, keeping the leadership team on track, and considering how best to report progress and shape board agendas to ensure momentum.

During the individual coaching sessions, the trustees decided to focus on the following themes:

- Personal presentation of self

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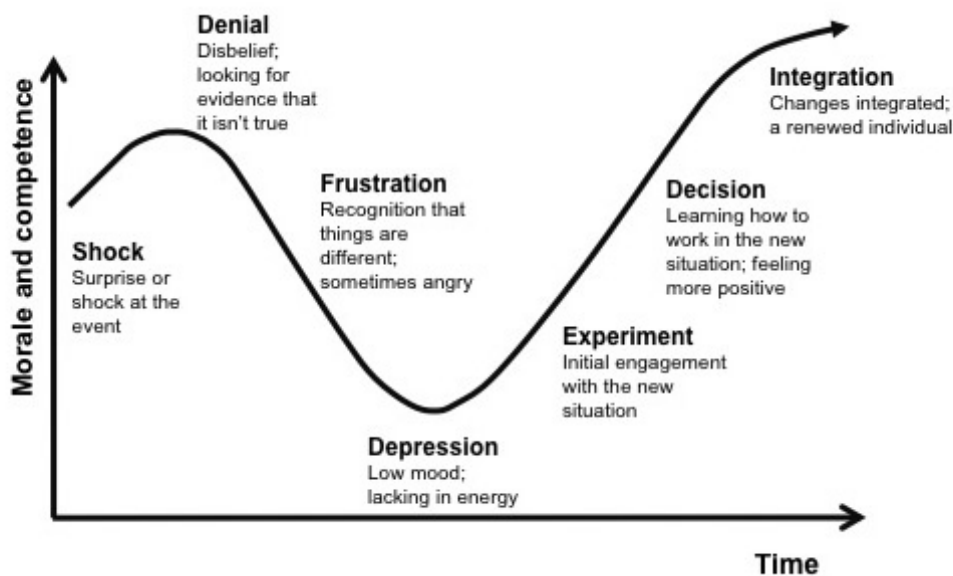
- Developing a confident and authentic leadership style

The themes in the Group sessions were:

- Exploring ways to lead, facilitate & chair Board, SLT and stakeholder consultation meetings
- Creating shared values, developing a positive culture, good behaviour, productive discussion & meaningful debate
- Developing informed decision-making processes.

Trustees and staff reacted with a mixture of excitement & doubt. Their initial negativity was overtaken by a sense of relief people were addressing ways to work together productively. Well researched, clear reports and short thoughtful presentations resulted in growing levels of optimism about the ability to create the conditions necessary to flourish.

The model that best describes key aspects of the first stage in this developmental journey is the 'change curve', developed by Elizabeth Kübler Ross in the 1960's, published in "On Death and Dying":



The first success was gaining board approval for the formation of a development committee to scrutinise and discuss recommendations of the executive and reports from our external business advisors. The three women offered to lead the new group. The Chair showed considerable courage by openly explaining to the board that they had come forward because they felt marginalised. He urged the board to capitalise on their drive. All three were elected unopposed - an unexpected turning point.

In Daniel Goleman's *Harvard Business Review* article in 2000 he suggested there are six core leadership styles that are likely to be used: coercive, authoritative, affiliative, democratic, pace-setting and coaching. He states: "the more of them a leader has mastered the better". The new board 'leadership' group, motivated by a shared goal, quickly realised all six of these core leadership styles cited would need to be brought into play at various times to break through resistance to change.

In *Time to Think*, Nancy Kline speaks of the ten behaviours that generate the finest thinking environment as being: Attention, Equality, Ease, Appreciation, Encouragement, Feelings, Information, Diversity, Incisive questions, Place. As the coaching sessions began, I consciously attempted to use these behaviours to change the dynamics in the room. My biggest challenge lay in helping trustees find ways to listen to each other and to allow space for reflection especially as the board all tended to move instantly towards solutions, which often prevented us from fully exploring a wider range of ideas and options. The cultural shift was slow, but discernible. It was marked by a growing willingness to be more concise, more honest and to reduce our reliance on union protocols which curtailed free flowing discussion. A lightbulb moment for me was the recognition that for several board members an unspoken issue was the fear that they might lose their places on a body that was as viewed as prestigious in union circles. The severing of important social and professional connections would be a significant loss for several trustees. We discussed this at length in a group coaching session. I began to appreciate the need to be sensitive when proposing changes to the governance model.

The group coaching offered some challenge to the usual approach to problem solving. It encouraged people to break the habit of rushing to solutions, an idea akin to the concept of “Peak Performance” discussed in Timothy Gallwey’s *Inner Game of Tennis*. Participants began to see the need to stop criticising and judging the past behaviour of board members. They ceased trying to find “the right answer” in favour of picturing desired outcomes, being willing to trust each other more and to take the heat out of their emotions. This freed up everyone’s capacity to think and they become less controlling.

The next breakthrough was the board agreeing to work with a modified version of David Clutterbuck’s “Seven Steps of Coaching Intervention”, from *Coaching The Team at Work*:

1. Identifying the need to improve/change
2. Observing and gathering evidence
3. Getting motivated by setting and owning personal improvement targets
4. Helping to plan on how to achieve the targets we set
5. Creating opportunities to practise the desired skills
6. Observing ourselves in action and giving objective feedback
7. Agreeing to work through setbacks

We endeavoured to build a shared language and develop greater trust. Trustees contracted with each other about the behaviours they wished to eliminate and those they wished to adopt, display and emulate.

Another powerful, simple and effective idea was printing the quote below on A3 colour posters and displaying them around the meeting room. Its power stemmed from the fact that every board member had at some stage during their careers been involved in primary care or health education. The words resonated. They prevented unproductive behaviours and generated much greater levels of mutual respect.

*Before you speak today, think:*

*Is it true, is it helpful or inspiring?*

*is it necessary?*

*Is it supportive?*

*Will it help to “make the boat go faster”??*

The idea underpinning this approach was to consider the language used as a means to enable rather than to reinforce limiting beliefs (as discussed in Marion Way's *Clean Approaches for Coaches*.)

I encouraged the use of visual aids to create timelines for decision making and adopted a metaphor of a boat travelling along a river to describe how the process felt was enthusiastically embraced by the board. The trustees spoke of moving past mountains, overcoming various obstacles, rocks, boulders, and angry beasts and "traversing our way through the weeds to a sunny tree lined landscape which is now in view." An artist was commissioned to draw the boat as it sailed through choppy waters towards a new fertile island, filled with promise.

Other behavioural changes resulted by inviting everyone to say one thing they had learnt at the last meeting and one issue they wished to resolve in the current meeting. Meetings ended by asking everyone in turn to say what had worked well and what actions they were willing to take prior to the next meeting to find consensus. In retrospect, elements of the GROW model were being interwoven alongside various concepts – such as Appreciation - inspired by Nancy Kline.

#### Results and Learning:

- The coaching programme and organisational development techniques helped a moribund board find a new purpose
- Board members began to phone and meet each other between meetings to share ideas and concerns
- The board developed a code of conduct and feedback forms
- Sexist language and bullying behaviours were challenged
- A decision was reached to merge two charities and a trading company and launch a new charitable company
- A revised governance structure with open procurement procedures was established
- A new board was formed, and a new Chair appointed
- We celebrated the contribution of outgoing trustees and staff

The ideas described in John Whitmore's *Coaching for Performance*, concerning organisational change and personal growth in the workplace neatly sum up what I experienced and observed in my consulting role. These inform my approach to coaching:

"A listening, learning, coaching culture may provide the best chance of riding the unsettling waves of change that businesses are facing... [it] cannot be prescribed by some outside authority. Performance will always be at its best when staff, shareholders, directors and even customers share the same values. Before that can happen, staff need to be encouraged to find out what their own values are."

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#### References and Further Reading

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\*used and quoted courtesy of Cath Bishop PhD.

### **Julian Stanley FRSA – Profile**

Julian is the Director of “Clear Thinking” Consultancy (<https://www.clearthinking.info/>) and Director of Cultural Development and Coaching at Ginibee Ltd (<https://www.ginibee.com/>). He is passionate about helping his clients explore their thinking, achieve clarity of purpose and discover solutions to the challenges they face. He works with individuals, teams and boards helping them to navigate change, facilitate communication, self-presentation & improve interpersonal relationships, develop succession plans & deal with career transitions.

A highly experienced CEO, commercial sector MD & third sector leader, Julian is also a mental health and wellbeing consultant. He has run national and regional charities in the community, education, training, business, economic regeneration and the performing arts. He has served on many boards as a non-executive director. His areas of expertise include: leadership development, governance and board dynamics, group facilitation. strategic planning & staff engagement.