

# **SOUTHERN AFRICA TRUST LEADERSHIP FOR CHANGE SCOPING REPORT**

January 2010



## 1. Introduction

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The aim of the Southern Africa Trust is to strengthen the voice of poor people in public policy processes that target the reduction of poverty and inequality in Southern Africa. It seeks to ensure that civil society leaders are able to champion broad-based civil society participation and consensual approaches to policy development and change that work to end poverty.

This requires leadership that is:

- Bold and strategic
- Passionate and energetic
- Geared towards social change and willing to engage in policy processes to actualise the rights of the poor and marginalised
- Capable of working in partnership with actors across different sectors, i.e. state, private sector, academia, labour, social movements, while at the same time keeping clear distinctions between sectoral identities
- Capacitated to engage critically without losing autonomy. This is especially critical when the issue of resources/funding threatens to create opportunistic tendencies.

Existing policies and strategies to end poverty in the region are inadequate, and have not succeeded in significantly reducing poverty. Consequently, the task facing civil society leaders is huge. While some of this bold and coordinated leadership exists, many gaps impair the effectiveness of the sector. . Few in the sector understand the strategic priorities or leadership requirements at a regional level. Too few leaders in the sector are engaged at the regional scale. Even fewer are able to apply a regional lens to issues and identify the strategic priorities at a regional level. In addition, civil society often does not have a good grasp of regional policy processes compromising its ability to effectively impact on the policy outcomes. The sector struggles to retain its leaders and is continually challenged to build new leaders and depth. Finally, while coordination has improved in the last year, the sector remains fragmented. Unless these gaps are addressed, the influence of the Trust will be limited and unsustainable.

The Trust's aim is to facilitate the creation of a platform for ethical and committed leadership through a process that allows leaders of CSOs to reflect on their roles and challenges, exchange information and experiences and learn from best practice in the region. Leaders include both those people holding formal leadership positions and those who do not, but are informally regarded as key leaders, in the sector. Part of leadership development also involves supporting institutional alliances and learning networks that can respond to emerging issues, and to the challenge of interacting with SADC structures and processes. In addition, the idea is to create durable and self-renewing systems and structures rooted in organisational value frameworks.

The Trust therefore commissioned this scoping report to:

- Develop a working definition of leadership for change
- Map existing leadership programmes, their focus areas and key stakeholders/beneficiaries
- Establish a rationale for either partnering with an existing initiative or developing and establishing a regional civil society Leadership Learning Programme
- Identify focus areas that will yield maximum regional impact and provide comparative advantage against the existing civil society leadership initiatives
- Develop a business plan/model for implementation of the leadership programme

This report provides a summary of the scoping as a basis for developing a business plan for the setting up of a leadership programme for civil society. The business plan constitutes the end of Phase 1 of the programme. Phase 2 will involve piloting and implementation.

Several leadership programmes exist in the region. However, many of these focus on management rather than leadership. In addition, they are not designed to meet the specific needs of civil society organisations. Based on the definition of leadership developed in this phase the following leadership programmes have been reviewed through interviews and document reviews: Learning to Lead, Common Purpose, Franklin Covey Institute, African Leadership Institute, African Women's Leadership Programme, Training for Transformation and an EED partner leadership programme. Other civil society capacity building programmes, that are not specifically confined to leadership but develop the capacity of civil society actor to engage on key policy issues, have also been reviewed. These include those of the Centre for Civil Society at the University of KwaZulu Natal and the Southern African Trade Union Coordination Council. Finally, there are a range programmes targeting the public sector such as the Nepad Capacity Building Programme. As these are not available to civil society leaders they have not been included in this scoping.

## **2. Defining leadership**

Leadership is about a journey in the company of others. It is about earning followers and engaging the disengaged. A leader is going somewhere; they have a goal and a vision. They attract others; they appeal to others; and influence others. Those who join them on the journey trust them to know the road.

Leaders carry out this process by applying their leadership attributes and qualities such as integrity, honesty, humility, courage, commitment, passion, energy, optimism, decisiveness, wisdom, determination, compassion, trust and vision. It is about a different way of being and behaving.

Leadership is about influence rather than power, although leaders might also have power. Good leaders are followed chiefly because people trust and respect them, rather than for the position or skills they possess. The followers, not the leader

determine if a leader is successful. If they do not trust or lack confidence in their leader, then they will be uninspired. To be successful a leader has to convince their followers, not themselves or their superiors, that they are worthy of being followed.

Everyone is called to take on leadership responsibilities of some sort at some point in their lives. Whilst it may be true that some people are born leaders, everyone can develop leadership ability through experience.

Leadership for change is the ability to create effective sustainable teams, of high energy, and effective individuals all working to achieve a common purpose. In the case of the Trust and its partners this purpose is a society free from poverty.

### **3. Proposed leadership model**

The Trust's definition of leadership and the proposed model for building leadership is built around six key ingredients of leadership as depicted in the diagram below. This model draws on the best of the current global discourse on leadership and complements this with indigenous knowledge, experiences and lessons drawn from work in the civil society sector over the years. The text below the diagram fleshes out the six elements.



*A. From the inside out*

Effective leadership starts with the individual. Leadership is an immensely personal act. Great leaders are at peace with themselves. They are in touch with their values. They integrate their values and principles into their character. Good leaders display strong integrity and credibility and through this build the trust of others in their roles and abilities. They commit to honesty, reliability, and confidentiality and are driven by a positive attitude towards themselves and others. Good leaders are also people who are rooted in, and responsive to, the context they are working in. They are conscious of their strengths and weaknesses and their leadership style. They know how to share responsibility. They understand how their life experiences and encounters have shaped who they are and what this means for the context they find themselves in. They are aware of how their personality influences others. They understand that the objectives of the team/ organisation/ sector are more important than their own self interest and they know how to manage themselves. These are the foundations of working effectively with others. Often leaders are discontent with the status quo and a vision of change and hope drives them.

Here the focus is on self-mastery and self-management. This is a daunting lifetime undertaking. It has a focus of how the individual performs in different environments and teams. It requires continuous work.

*B. Harnessing the energy and power of people*

Good leaders harness the energy and talent of others to achieve the goal. They know how to get the best out of all the people they engage with and to win over stakeholders. They know how to create effective teams and alliances. Leaders empower and equip others as part of an ongoing process. The leader operates as a "model", "mentor" and "empowerer". They embody the spirit of ubuntu. They seek out partners beyond the boundaries of their group. They are good at building coalitions to tackle the social and institutional challenges they face. They are also good at harnessing others potential and building new leaders.

Good leaders have excellent people skills and are able to communicate with and motivate all kinds of people. Leaders are effective listeners based on the true valuing of their teams and people. Leaders value what their teams' value, are able to add value to their teams, and make themselves more valuable through continuous learning and openness.

Leaders are not always those in the front. Often good leaders lead from behind. They let others fill the front seats. Leaders also have a good understanding of power and how it can be both a positive dynamic that unifies people or a negative one that divides people.

Successful leaders surround themselves with other successful leaders and personnel who share their values and principles. They are able to influence others to follow the lead.

Here the focus is on leading others. It needs to address how to develop effectively focused and functioning teams; how to build alliances and coalitions across levels, ideologies and sectors; how to manage people to maximise their potential; how to address diversity; and how to manage change.

*C. Begin with the end in mind/ A clear road map*

Leadership work is about purpose and change. When you're doing leadership work you're concerned with why you and your group are here, what you're doing, why, and you're concerned with how that will change over time. Therefore another important leadership trait is vision. Leaders do not have to craft the vision but they do need to promote the vision. In the case of the Trust and its partners this vision is a SADC region free from poverty.

Vision is closely allied with positive thought and positive talk, but involves taking that positivity to the next level. It involves being clear on what end state you are striving

to achieving and what the world will look like once you are successful. It is about changing the way we think about an issue and what is possible. It is about stretching people without losing them. It gives people something to strive toward: a view beyond the present, into the future of the group, organisation or society.

Here the focus is on analysing the problem and crafting a goal and strategy. It is about knowing how to unpack problems and understand the root causes. It's about identifying and knowing your enemy. It is also about understanding the architecture of civil society in the region and how this can be used to achieve the goal of poverty eradication. It is about knowing what is deeply important and keeping that picture in mind. It involves identifying appropriate milestones that indicate success. It is about keeping the ladder leaning against the right wall so that every step that is taken gets us to the right place faster. It is however also about helping people achieve major transitions and their goals.

#### *D. Discernment and courage/ Counter-intuitive wisdom*

Good leaders understand the fine line of sensitivity and courage required in their complex and political environments. They are good listeners and sensitive to the needs and dynamics of their followers. At the same time, they are courageous in speaking the truth and providing firm guidance when required. They recognise that the obvious or popular answer is often not an answer at all but makes the problem worse. They help people own the truth. Good leaders know that there are no easy answers to everyday dilemmas of leadership and do not dodge making decisions because of difficulty. This is often a scary process. Courage is about recognising this fear and inspiring yourself and others to move beyond the fear.

Making decisions does not mean abusing your power as a leader. Good leaders are conscious of the power dynamics in a situation, their own power and how they might impact on the dynamics and the power relations in a situation.

Here the focus is on navigating the fine line. It is about listening and holding the needs in the group. It is about choosing the right tactics. It is about priorities and decision-making. It is about standing by decisions that may be unpopular. It is also about knowing when you have made a mistake and being able to own up to the mistakes. It is about retaining the power of the group not any one individual.

#### *E. Adaptability*

Leadership demands flexibility. We live in a dynamic and changing world. It is also a complex world. We are overwhelmed with information capable of informing us of changes in the context, our team, our information almost immediately. This context requires responsive leadership, that is leaders who are able to adapt to the new information or context and who are able to capitalise on the new opportunities this presents. It involves re-inventing the shared vision and the organisation to respond to the new opportunities. Often this also involves re-inventing oneself.

This focuses on managing complex environments and change. It addresses the role of the leader in a wider organisational and social context. It focuses on managing change, relationships and maximising synergies.

#### *F. Recognition that it is a long road*

Good leaders recognise that the journey of change involves a long road. They persist in difficult circumstances. They are flexible and able to adapt when necessary. They also seldom give up. They take time out to reflect on the context, goals, successes and failures.

They recognise that today's skills may not be what are needed tomorrow. They place emphasis on on-going learning for they know they can always improve. They are open to new ideas and tolerant towards others. They also recognise that long journeys generally require more than one leader. They are continually creating new leaders. At times good leadership involves standing down and allowing these new leaders to carry forward the struggle.

This focus is on how to keep motivated, retaining the on-going learning environment and building the next generation of leaders.

## **1 Locating leadership for change**

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We propose working with an understanding that in order to lead change, leadership should be considered at four levels:

- Leadership of the self
- Leadership of the organisation
- Leadership of the sector
- Leadership in wider society

#### *Leadership of the Self*

In this leadership model, leadership starts with the transformation of the individual, the leader. Leadership of the self is about whom you are, what you want to achieve, how you will achieve your goals, and how you will influence and support others in the achievement of your shared goals. Your goals are not simply personal goals but emerge from that sense of "discontent about the status quo". Being able to lead is about self-understanding and self-management and a positive attitude to life and those about you. This is based on the "**from the inside out**" leadership principle of ensuring that personal transformation empowers the individual to lead.

#### *Leadership in the Organisation*

Leaders work with groups of people linked together under an organisation to achieve a specific goal. Leaders inspire the vision within an organisation to facilitate necessary change. The vision leaders inspire is focused on improving the impact of the organisation in its external environment, particularly enhancing the impact of its programmes on the lives of the poor, by building an enabling internal environment. Leadership in organisations is also about providing clear direction on the kind of

organisation that is need to meet the challenge and shepherding the team to transform the organisation to adapt the requirements of the context.

Leadership in organisations is about influencing people and helping the group or entity deal with the core challenges it is facing and embarking on and following through the necessary change.

#### *Leadership in the wider sector*

Organisations are generally part of a larger collective of organisations or sector. Change might involve a change for the whole sector. Leaders within the sector are able to effectively communicate with different kinds of people and mobilise a wide range of stakeholders around a shared vision and change plan. Leaders are able to inspire others to look beyond individual and group interests and acknowledge collective benefits through co-operation and dialogue. Leaders are able to inspire stakeholders to see "long-term" and accept the **"long road ahead"**.

#### *Leadership in Society*

While developing leadership in individual organisations and sectors is important, effective societal change requires leadership through society. Leaders that influence societal change are those that have a broad world-view and understand issues of inter-dependency and inter-relatedness. They are people who can bring sectors or systems together and break down a 'silo-approach' to operations. Leaders at a societal level have a proven track record and have demonstrated all the leadership principles discussed above. They have strong personal integrity and high levels of influence. Building societal change leaders requires looking beyond the needs of specific organisations to assess where leadership capacity is most needed to bring about positive change.

Using the definition developed above leadership within the organisation, sector/system and society requires the leadership principles of **"harnessing the energy and power of people"**, **"beginning with the end in mind"**, **"discernment and courage"**, **"adaptability"** and the **"recognition that it's a long road"**.

At the same time leaders are people who can transform attitudes, approaches and mindsets of the citizenry to take collective responsibility for being drivers of transformation and change.

## **2 Overview of existing programmes**

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There are a number of leadership programmes in the region. Many are linked to organisations and some have links with universities or similar training institutions. Most of these tend to be more management than leadership focused. Others are short-term courses offered by a range of institutions that focus on a particular tool or skill. Few cover the six components identified in the definition of leadership

developed for the Southern Africa Trust. The scoping team identified eleven programmes that reflect a few or most of the components.

The reviewed leadership programmes have similarities and differences. All the leadership programmes focus on individual change as a primary component of organisational and societal change. However, the approaches and foci adopted by the programmes differ.

*Learning to Lead* has a specific entry point based on the identification of 'energy' as the key driver of effectiveness in individuals and organisations. It is primarily focused on individuals as agents of change in organisations. *Learning to Lead* addresses the needs to develop leaders who are able to harness the energy and power of others, and for leaders to work "from the inside out". However, the programme is not designed to equip leaders to challenge the status quo or to focus on societal change. The *Learning to Lead* approach, therefore, is only a part of the Trust's broader approach to leadership development within the region.

*Common Purpose* focuses on the concept of "leading beyond authority". It challenges leaders, through exposure to other leaders' experiences and insights, as a means to effect personal change. The programme is 'open-ended' in that it provides the spaces and interactions for established and new leaders to engage and to be challenged. The interactions are unguided and unprompted and participants extract what they are able to from each exchange. The programme is focused primarily on assisting individuals to change "from the inside out". There is very little direct focus on other areas of the Trust's leadership approach, although an assumption would be that changed individuals will influence their organisations and society. The *Common Purpose* approach lacks a clear set of values and objectives that are necessary in a civil society leadership programme.

The *Franklin Covey Institute* appears to focus both on the development of "highly effective people" and "highly effective managers" who use their positions of authority. It deals with management issues and how the leaders effect change within their organisations. The *Franklin Covey Institute* approach has a number of strong similarities with the Trust's leadership approach. It is focused on developing managers who are able to harness the energy of people, lead with a "clear road map", and be adaptable. There is a less strong emphasis on issues concerning "discernment and courage" and the need to speak and help others own the truth. Unsurprisingly the programme is more focused on leadership of the self and organisation, and very little on leadership within the sector and broader society. The approach is useful although in its current form focuses more on strengthening than challenging the status quo.

The *African Leadership Institute* runs several multi-faceted leadership programmes annually. This includes the Archbishop Tutu Fellowship programme, a part-time programme for approximately 20 selected high potential leaders from across Africa.

This programme bears several similarities to the proposed leadership model outlined in this document. The driving vision of the Institute is to build capacity and capability for strategic and visionary leadership in Africa. The “aim is to introduce young achievers who are likely to become leaders in the various sectors, from business to government to community levels, to the key principles, requirements and challenges of leadership”. The trained leaders then form an extended network and communicate via web facilities and participate in leadership projects across continents. Another of the African Leadership Institute’s Programmes is the Nelson Mandela Promise of Leadership Dialogue. This is a dialogue between leaders in all sectors. The Institute also produces a quarterly magazine on leadership that is available to the public.

*The Synergos Fellows Programme, Training for Transformation* and the *Proteus Initiative* all focus on building capability and faculties for understanding society and through this developing more effective activists for change.

Training for Transformation is focused on community development leaders while Proteus is focused on NGO leaders. Training for Transformation meets much of the values, analytical and advocacy needs of the Trust constituency but its emphasis is on community development rather than civil society and this shapes its programme content and format.

Proteus meets the values and civil society focus that underpins the Trust’s approach to leadership and is focused on building the faculties for understanding our complex environment. It is more focused on how to hold complexity and difference than on any particular change process.

The Synergos Programme is a global programme focused on setting up a network of leaders working to end poverty and inequality. Leadership development happens through a range of programmes which combined build the required capabilities and capacity to lead change. In the region Synergos has another relevant programme, its community grant makers leadership cooperative. This brings grant-makers together to reflect on common challenges and issues.

The *African Women’s Leadership Initiative* is focused on building women leaders committed to changing society. This addresses one aspect of the Trust programme only.

The *Centre for Civil Society* and *South African Trade Union Coordination Council* are less focused at the individual level per se, and more at organisational and societal levels. They provide the necessary policy content dialogue and development that is lacking from the mainstream leadership programmes reviewed above.

The *Centre for Civil Society* is focused on effecting broader societal change through knowledge development and promoting dialogue through teaching, research and publishing.

The *Southern African Trade Union Coordination Council* programme, still in its initial stages, builds networks, awareness and information sharing amongst its organisational affiliates so that they can engage effectively in regional policy issues.

The various programmes are summarised in the table below.

<b>Leadership Programme</b>	<b>Approach</b>	<b>Programme Design</b>	<b>Target Market</b>	<b>Academic Partners</b>	<b>Key Instruments</b>
Learning to Lead <a href="http://www.ltl.co.za">www.ltl.co.za</a> (Colin Hall)	<p>The <i>Learning to Lead</i> programme addresses the question of how to get things done without power and authority. The assumption is that the world/South Africa has been managed into crisis through power play and that power cannot get the world/SA out of crisis. Rather, if one positively energises individuals, communities or organisations a huge resource is at one's disposal and the positive effects are exponential.</p> <p>An approach has been developed that focuses on the relationship between <i>energy</i> and <i>effectiveness</i> within individuals, organisations and communities. The infectious nature of and direct relationship between energy and conscious brain capacity are explored. Questions of how to create energy and how to enable a sustainable level of energy capacity are tackled. <i>Learning to Lead</i> is a 'leadership', as opposed to a 'management', programme.</p>	<p>Full programme consists of 8 modules: (see Appendix A for further detail)</p> <p>1<sup>st</sup> Module: Purpose            2<sup>nd</sup> Module: Discovering human energy            3<sup>rd</sup> Module: Measuring energy- eQ Energy Survey            4<sup>th</sup> Module: Understanding our personal and collective energy: Red (power) versus Blue (energy) game.            5<sup>th</sup> Module: Reflection            6<sup>th</sup> Module: Getting started on a personal journey – FRACTAL tool, a simple action repeated frequently and at regular intervals            7<sup>th</sup> Module: The inter-personal journey – the exciting challenge of high energy relationships – develop and practice listening skills            8<sup>th</sup> Module: The organisational challenge – where are the traps that block energy flows? How is positive energy encouraged? What new strategic horizons could be reached?</p>	<p>Geographic: South Africa</p> <p>Participants: Diverse markets from communities, corporate and government – individuals and teams.</p>	None	<p>Two day 8 module Learning to Lead Leadership Programme</p> <p>One day high energy experience called Energy Day</p> <p>Half day experience to create awareness of human energy as the crucial determinant of personal and organisation effectiveness</p> <p>A two and a half day Train-the-Trainer programme</p> <p>A one-day introductory presentation for large audiences</p> <p>Coaching</p> <p>Team building</p>

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	The <i>Learning to Lead</i> approach is based on Colin Hall's extensive experience in corporate management, for example, SAB and Wooltru, and focus on leading large staff contingent through changes in South Africa from 1985.				Programmes such as 'Tracking', 'The Power of the Pride' and 'Isandlwana and Rorke's Drift'
Common Purpose South Africa  (Started in the UK in 1989) <a href="http://www.commonpurpose.org.za">www.commonpurpose.org.za</a>	The approach is to offer experiential learning programmes on leadership where people come from different backgrounds with a "Common Purpose". The underlying concept is "how to step up and lead beyond authority". The aim is to 'engage and inspire rising generations of leaders to shape the future of their city or community'. Programmes provide participants with an opportunity to access information and knowledge from a wide range of persons in leadership capacities and institutions they would normally not have access to. They get to 'navigate and build a matrix of networks that enable them to influence positive change'. Programmes are 'designed with a strong element of group diversity' brought together across the	Matrix programme – a set programme for established leaders who are already influencing change in a specific locality: <ul style="list-style-type: none"> <li>Two day residential course followed by a series of intensive day-long programmes spread over 10 months</li> <li>Day-long programmes concentrate on core issues: power, money, networks, change, what's on the horizon, leaders, social issues</li> </ul> TheKnow/Meridian Programme – a flexible, modular programme for established leaders who are already influencing change and shaping landscapes <ul style="list-style-type: none"> <li>Course can be over 6 months or 7 days</li> <li>Events centre on 'Understanding the Place', 'Understanding Change' and</li> </ul>	Geographic: South Africa and Zimbabwe  Participants: Leaders in the private, public and civil society sectors	No formal relationships	On-site visits Engagement with expert speakers Experiential learning through creation of 'spaces' to engage with leaders for sharing of insights Personal reflection Small group learning Common Purpose Graduate Committee and Programme Linking into international networks

<b>Leadership Programme</b>	<b>Approach</b>	<b>Programme Design</b>	<b>Target Market</b>	<b>Academic Partners</b>	<b>Key Instruments</b>
	<p>private, public and civil society sectors. Programmes are regarded to be effective in:</p> <ul style="list-style-type: none"> <li>• Increasing the knowledge and understanding of those in leadership positions about the reality of all aspects of life in their city or community;</li> <li>• Building the capacity of leaders and decision makers to tackle the challenges facing them both in their own field and in the wider community.</li> <li>• Helping to maximise the use of scarce resources.</li> <li>• Encouraging an active civil society.</li> </ul>	<p>'Leadership Insights'</p> <ul style="list-style-type: none"> <li>• Visit small businesses, multinational corporations, community projects and prisons etc</li> </ul> <p>The Navigator Programme – for young bright people usually in their first career roles who are most likely tipped to rise through the ranks in their organisations and influence change in our society</p> <ul style="list-style-type: none"> <li>• Intensive five-days residential programme providing a 'behind the scenes' view of how organisations, cities and societies work.</li> <li>• Explore issues such as: levers of power, effecting change, managing risks and resources, creativity at work and in communities</li> </ul>			
<p>Franklin Covey Institute, South Africa FCSA (Pty) Ltd  <a href="http://www.franklincovey.ro">www.franklincovey.ro</a></p>	<p>The FranklinCovey approach "is to understand the challenge of greatness at an unprecedented level". The measure of greatness is regarded as four outcomes:</p> <ul style="list-style-type: none"> <li>• Sustained superior performance</li> <li>• Intensely loyal customers</li> <li>• Highly engaged and loyal</li> </ul>	<p>The Franklin Covey Institute offers a variety of courses (for detailed info See Appendix C), such as:</p> <p><i>Course 1:</i> The 7 Habits of Highly Effective People – 3 ½ day programme</p> <p><i>Course 2:</i> The 7 Habits for Managers – 2 ½ day programme</p>	<p>Geographic: South Africa, although increasingly Southern Africa</p> <p>Participants: Primarily private and</p>	<p>Historically no formal relationships but current exploring a relationship with an institution. They were</p>	<p>Training courses  Participant guidebooks  Pre- and post-workshop assessments  Audio CDs  Management Essentials Book</p>

<b>Leadership Programme</b>	<b>Approach</b>	<b>Programme Design</b>	<b>Target Market</b>	<b>Academic Partners</b>	<b>Key Instruments</b>
	<p>employees</p> <ul style="list-style-type: none"> <li>• Distinctive contribution</li> </ul> <p>In order to “build a great organisation, you need great leaders and effective people who execute the organisation’s mission with excellence”. One also needs a shared process for focusing on and executing the organisation’s mission allows “great people to build something important and enduring”.</p> <p>The principles of the Institute are:</p> <ul style="list-style-type: none"> <li>• People are inherently capable, aspire to greatness, and have the power to choose.</li> <li>• Principles are timeless and universal, and are the foundation for lasting effectiveness.</li> <li>• Leadership is a choice, built inside out on a foundation of character. Great leaders unleash the collective talent and passion of people toward the right goal.</li> <li>• Habits of effectiveness come only from the committed use of integrated processes and tools.</li> </ul>	<p><i>Course 3:</i> Focus Achieving Your Highest Priorities – 1 ½ day workshop</p> <p><i>Course 4:</i> XQ Services</p> <p><i>Course 5:</i> Leadership Foundations: a Workshop for Emerging Leaders</p> <p><i>Course 6:</i> Working at the Speed of Trust</p> <p><i>Course 7:</i> The 4 Disciplines of Execution: Skills Workshop</p> <p><i>Course 8:</i> The 4 Disciplines of Execution: Manager Certification</p>	public sector managers	not willing to disclose further information at present.	<p>Paper and electronic versions of the tools taught in the training</p> <p>Step-by-step guide to writing Personal Mission Statement</p> <p>Tip sheets</p> <p>“21 day contract” for completion of exercises and implementation of action plans post-workshop</p> <p>Trust Action Plan</p> <p>Spiral-bound participant guidebook</p> <p>Coaching sessions</p> <p>Manager certification</p>

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	<ul style="list-style-type: none"> <li>Sustained performance requires a balance between a focus on achieving results and building capability.</li> </ul>				
<p>African Leadership Institute  <a href="http://www.alinstitute.org">http://www.alinstitute.org</a></p>	<p>The Institute, which forms part of the Aspen Global Leaders' Network, focuses on creating networks to effect change. This is done by using the influence of powerful individuals and leaders who are gathered through the range of ALI course. In addition the institute produces a quarterly leadership magazine.</p> <p>One such course is the <u>Archbishop Tutu Fellowship Programme</u>.</p> <p>The leadership programme places emphasis on learning and experiencing, not teaching. It offers a variety of formal and informal opportunities to enhance the leadership capabilities of the candidates. The programme is defined around four types of learning – experiencing, interaction and observation, shared perspectives and theory, and experiencing.</p>	<p>The programme consists of a series of intensive workshops over a period of a year. The AFI has agreements with various institutions including the University of the Western Cape (South Africa), Makerere University (Uganda), Ghana Institute for Public Administration (Ghana) and Oxford University (UK) where the workshops are held. Faculties are invited from all over the world and key leaders brought to share their experiences with participants. In between workshops, participants will undertake assignments and community projects. Each leadership trainee will be assigned a mentor over the period.</p> <p>Topics that are discussed include: leadership theory, challenges facing African leaders and a global dimension of leadership.</p> <p>The Nelson Mandela Promise of Leadership is annual dialogue focusing on the promise of the</p>	Leaders for Africa	<p>Gordon Institute of Business Science-University of Pretoria, University of the Western Cape (South Africa), Makerere University (Uganda), Ghana Institute for Public Administration (Ghana) and Oxford University (UK)</p>	<p>Workshops  Assignments  Community projects  Moderated debates</p>

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	Another programme is the Nelson Mandela Promise of Leadership Dialogue. This is a dialogue that engages stakeholders in business, government, media and civil society around leadership.	youth whose future today's leaders are responsible for in the leadership decisions they take now. It deals with the leadership challenges on the continent.			
Training for Transformation	<p>The course, run by the Grail, is rooted in the Paulo Freire methodology. Its focus is on equipping participants to work for a more just and equal world.</p> <p>Training for Transformation's emphasis is to build skills, insights and abilities of teams from NGOs and community organisations to analyse policies and environments, advocate for change and empower local self-reliant communities.</p> <p>The course combines theory and practice. Participants are expected to read extensively around each topic, write papers and apply the new skills acquired in the communities in which they work.</p> <p>This programme is focused on</p>	<p>The course is run over 2 years for the full course and 1 year for the shortened version. The course is a combination of face-to-face training, praxis and fieldwork. There are two or three teaching blocks, each followed by a practical assignment that is then written up. During the teaching blocks, participants are engaged as whole beings – spiritually, physically and intellectually.</p> <p>Phase one focuses on understanding what development means and how to apply Freire's methodology in a community. It includes an introduction to development and community building, Strategic life management, Popular education and applying the Freire method</p>	<p>Geographic: African continent</p> <p>Participants: Community leaders and NGO leaders, preferably in a team</p>	<p>The Development Studies Centre at Kimmage College, Dublin, Ireland &amp; exploring relations with University of KZN</p>	<p>Teaching blocks, reading packs, assignments and post course support groups.</p>

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	community development leadership and not management.	and Spiritual reflection. Phase two is focused on the individual and includes self-awareness, issues of culture and ethics. Phase three focuses on strategic thinking and tools for analysing the context. It includes development, economics, ecology, advocacy, feminism and finances.  It is followed by a home phase where participants are expected to put into practice.			
Synergos Fellows Programme <a href="http://www.synergos.org/fellows">http://www.synergos.org/fellows</a> and Synergos Community Grant Makers Leadership Cooperative	The Synergos fellows programme is value based and focused on strengthening efforts to end poverty and inequality.  Synergos targets those leaders who believe that they have something to learn and something to teach their peers, and are open to mentoring and being mentored by their peers.  The programme is centred on an understanding that by “bridging” different perspectives and opinions often found across the breadth of different stakeholders,	Fellows are exposed to other leaders and engaged around leadership issues during this three-year programme. The programme uses a range of tools including peer-to-peer learning, meetings, exposure of eminent persons and training.  The Community Grant Makers Leadership Cooperative consists of twenty-eight community grantmakers and grantmaking trusts. It has emerged as a significant network in philanthropy in the Southern African region. The Coop convenes three times	Global leaders, philanthropic and social justice organisations representing or serving poor and marginalised populations.		Knowledge development, peer-to-peer learning, annual and regional meetings, learning journeys, workshops, and contact with eminent persons.

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	<p>better interventions can be designed, implemented and sustained. It is also premised on a belief that complex problems are best addressed by tapping the wisdom, resources and experience of civil society, government, business and those most directly impacted by the system being altered.</p> <p>The Synergos community grant makers leadership cooperative Its aim is to advance, build and strengthen sustainable community-based development in Southern Africa.</p>	<p>annually: for two learning events and one retreat. Between the annual events, members remain in contact through the Synergos office, as well as by exchanging information about activities, events, funding possibilities, new publications etc. among themselves via mainly e-mail.</p>			
<p>Proteus Initiative  <a href="http://www.proteusinitiative.org">www.proteusinitiative.org</a></p>	<p>This programme is a two-year programme focused on developing the faculties for intuition as a basis for leadership. The course focuses on conversations. Practice and simulation as a basis for learning to develop the required faculties.</p> <p>It seeks to develop agile, flexible, alert and conscious social practitioners who are able to deal with our socially, ecologically and economically fragmented and unpredictable world.</p>	<p>There are two products a 5-day seminar and a two-year leadership programme. The two-year programme consists of seven 3-day sessions and back home projects to be completed between sessions.</p> <p>The focus understanding complexity and how one leads in such contexts. The course uses tools to build faculties to understand, experience and practice a new way of working. Each session includes a component</p>	<p>Geographic:  South Africa and Africa  Participants:  NGO leaders and managers</p>	<p>None</p>	<p>Training programme  Back-home projects  Peer learning network  Coaching programme</p>

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	<p>It is about an inner path of social change based on developing an understanding of our complex world and processes of change.</p> <p>It focuses on understanding the underlying dynamics, which lie at the heart of particular social situations, and developing a consciousness about how one's actions can be creative or destructive.</p> <p>This programme is focused on leadership not management.</p>	<p>of self-development, finger exercises to understand and experience a different way of being and strategic readings. In addition, each session will be dedicated to improving the observation, thinking and intervention capacities of participants.</p> <p>Coaching will be offered to management teams where at least one member is a participant in the programme.</p>			
African Women's Leadership Institute	The purpose of the AWLI course is to promote a progressive agenda for women and advocate for fundamental change. The courses aim to develop inter-generational systems of knowledge and skills transfer.	An annual resident leadership-training programme is a three-week programme. The course is based on the POT framework namely Personal empowerment, Organisational Development and Transfer of skills and knowledge. It prepares young women to deal with the personal, political and contextual issues activists face in their communities.	<p>Geographic: African Continent</p> <p>Participants: Young women in leadership positions or with potential to become leaders in the future.</p>	Unknown	Training course, reading pack and post course support via a peer network.
Centre for Civil Society, University of KwaZulu Natal	The objective of the Centre for Civil Society is to "advance socio-economic and environmental	<p>Three core strategies:</p> <ul style="list-style-type: none"> <li>Independent critical scholarship</li> </ul>	Civil society organisations across the	University of KZN	Information dissemination, resource sharing,

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	justice by developing critical knowledge about, for an in dialogue with civil society through teaching, research and publishing”.	<ul style="list-style-type: none"> <li>• Information dissemination</li> <li>• Teaching/training.</li> </ul> <p>The Centre runs a website with over 2000 articles, documents and images. It also hosts a well-used resource centre with books, films, journals etc. It offers a masters-accredited course on economic justice advocacy that travels to various African sites, a course within the School of International Training’s Durban programme that includes participation by ten community activists twice a year. It sponsors a dozen research masters and doctoral students with specialised civil society focus. The Centre offers specific modules as part of the Development Studies Masters programme at UKZN on topics such as: globalisation and development, civil society and development, the rise of new social movements etc.</p>	African continent and internationally		research & training.
Southern African Trade Union Coordination Council	<p>SATUCC approach is to:</p> <ul style="list-style-type: none"> <li>• Coordinate and network affiliate activities on regional policy issues (solidarity building, actions and campaigns)]</li> <li>• Provide information on SADC protocols, activities and</li> </ul>	No information available at the time of concluding the report	Geographic: Southern Africa	Unknown	

<i>Leadership Programme</i>	<i>Approach</i>	<i>Programme Design</i>	<i>Target Market</i>	<i>Academic Partners</i>	<i>Key Instruments</i>
	<p>events to affiliates (establish data bank and interactive website)</p> <ul style="list-style-type: none"> <li>• Create awareness and provide advice to affiliates</li> <li>• Present affiliates views to relevant structures of SADC <ul style="list-style-type: none"> <li>• Expose errant government not implementing and maintaining a functioning SADC National Committee involving civil society and trade unions in SADC meetings</li> <li>• Build capacity in affiliates to understand and engage effectively in regional policy issues</li> </ul> </li> </ul> <p>Bring affiliates together to share experiences to facilitate and promote the process of regional integration</p>				

### **3 Lessons from existing programmes**

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#### *Different Approaches needed for Different Audiences*

Many of the courses reviewed included similar elements – working with the personal, understanding change and the context, understanding power, influence and groups, etc – however, there are also differences amongst the courses. Each is targeted to meet the needs of a different primary market and is designed – in terms of emphasis, timing and format – to meet the needs of this audience. Also each is presented from a different perspective, which colours what is shared and how the learning environment is simulated. The courses that most closely match the audience and needs of the Trust are the African Leadership Institute and Proteus Institute courses. The African Leadership Institute course does not focus specifically on civil society and the Proteus does not have a particularly regional focus. The change agenda of both is also slightly different.

#### *Differentiating between Leadership and Management*

Leadership and management is not the same thing although the two are closely linked. Management focuses more on a set of skills needed while leadership tends to focus on a set of capabilities. Some programmes, such as the Franklin Covey Institute have been associated more with management training in the past. Leadership training is a relatively “new” focus with the programmes reviewed examples of emerging approaches. What is increasingly evident is that there are very few leadership programmes in existence that focus on leadership for change linked to the Trust’s value base. The Franklin Covey, Learning to Lead and Common Purpose programmes are focused more on the process of change than a particular kind of change. The African Leadership Institute course is focused on building a new generation of leaders for the continent but does not share the same change agenda or civil society focus. Training for Transformation, the Proteus Initiative and African Women’s Leadership Initiative are more value-driven and linked to a specific understanding of societal change. However, these programmes may benefit from drawing on the approaches and instruments used within the more mainstream leadership development programmes.

#### *Recognition in the Market that Individual Change is the Starting Point*

There is a growing awareness in the market that leadership development starts with personal change. Individual leadership attributes are often shared amongst programmes. However, few programmes link personal change, organisational change and societal change in the same continuum. The personal values of leaders may be challenged by programmes, but the translation of this into a broader critique of society, politics and policy is not entertained.

#### *Sustaining Leaders*

There are a variety of tools and methodologies being utilised, with an increasing awareness that short-term training courses may not be effective in sustaining change. For example, Common Purpose runs its programme over a six-month period and then offers a “graduate support programme”. The FranklinCovey Institute has

also designed various tools to support post-workshop commitment, such as audio CDs, “21 day contract” and coaching sessions. The Proteus Initiative runs its programme over 2 years and offers mentoring and coaching support to participants and their teams and the Training for Transformation programme is planning a peer network. The Synergos Programme includes a graduate fellows network and programme and the African Institute also includes a fellows programme.

#### **4 Recommendations for the Leadership for Change Programme**

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It is clear from the Trust’s work in the region while many leaders exist what is missing is a coordinated change programme specifically targeting the civil society sector in the region and clear leadership driving such a programme. In addition, enhanced leadership could strengthen many of the partners the Trust works with. This was the basis for the Trust commissioning this scoping report.

Having scoped the various existing leadership programmes in the region, the authors of this report recommend that a new programme is needed to meet the specific needs of the Trust and its partners. This programme should draw on best practices of other existing programmes while at the same time meet the specific leadership challenges and needs in the sector. The programme will form the basis for a fellows programme and social network of CSO leaders over time. This will be used as a basis for strengthening the third or civil society sector’s capacity to play its rightful role in the trio with the public and private sectors. The programme should be accredited through a partnership with a University or multiple Universities.

##### ***Proposed objectives and required elements of a programme***

The proposed objectives of the recommended Trust Leadership for Change programme would be to create effective civil society leaders who:

- Display sound values and principles;
- Are able to harness the energy and talents of others;
- Are purpose-driven and are able to lead change;
- Display discernment and courage;
- Are adaptable and realise they are in for the “long haul”;
- Are able to mobilise a wide range of stakeholders;
- Understand the broader political, social and economic environment and are committed to strengthening the voice of the poor in Southern Africa.

##### ***Approach***

A two year programme is proposed with three blocks of 5 days each and an option to participate in an annual leadership retreat both while in the programme and after the programme.

Best practice suggests leadership is best developed through a combination of methods including immersion, simulation of situations, peer learning, reflection, reading and writing.

Leadership for Change will start with the real problems and challenges leaders in the sector face. It will provide a platform for leaders in the sector to collectively reflect on these and how best to address them. The programme will recognise there is not one right answer, rather a range of possible solutions. Different leaders will opt for different solutions and different contexts will require different solutions. The challenge for leaders is to discern what approach is best in what context. This discernment will be built through the process of reflection, the introduction of a series of tools to assist leaders in their decision making and simulation of situations that enable participants to stand back from their day-to-day reality and explore the challenges, dilemmas and trade-offs before applying these to their own situations.

The programme will bring leaders from the various apex organisations, the national members of the apex organisations and key strategic players in regional policy processes together on a regular basis to discuss and debate their leadership challenges while at the same time using the opportunity to broaden the toolbox people have at their disposal. This will be achieved through introducing leaders to the thinking of prominent leaders, by exposing the team to useful tools that can aid decision making, by drawing on case studies and best practices from around the world and learning from the successes of others.

In addition to the regular face to face sessions where leaders will come together to reflect and retool, the programme will also offer support from experienced mentors who will support the team as they apply the tools in practice. This will be available as needed and demanded by participants and will not be a compulsory element of the programme.

### ***Target***

Individuals who have a strategic role to play in the poverty eradication agenda in the region. These will be drawn from the various SADC apex organisations and their members. In particular, the programme will focus on the second tier of leadership as its contribution to ensuring the growth and sustainability of the sector and its work in the region. Selection will be based on the strength of the motivation of interested individuals. Each group will be diverse group drawing in leaders from CBO, NGOs, research groups, faith based groups, unions and the media.

Prior to acceptance on the course, participants will be asked to complete a questionnaire that will be used to inform the content focus areas in the course.

### ***Format***

Groups of around 15 people per programme, run over 24 months with three residential sessions, a peer learning network available on line, optional monthly coaching from an experienced facilitator, a bi-annual dialogue event and an opportunity to participate in an annual leadership retreat at the end of the two years.

### ***Proposed programme***

Each of the three blocks is inter-related and in practice the course will move between the issues. However, each block will have a primary focus as detailed in the schematic below. The approach in each block will be to use a combination of exercises, simulations and problems drawn from participants to develop the six leadership capabilities detailed in the overview. In addition, participants will be expected to read extensively around each area, keep a journal and write up their reflections.

Block	Key competencies	Programme
Block One 5 days residential block	Enhancing self knowledge, harnessing energy and building teams	Understanding your own strengths and weaknesses, your leadership style and how you operate in a group  Making your values and passion explicit and unpacking what energises you  Locating your style in a broader continuum of leadership styles  Developing your emotional and organisational intelligence  Working with people from diverse backgrounds
Assignment One	Reflection on values and leadership	Participants will be asked to write an article focusing on values and leadership. This could involve identifying a leader who they admire and interviewing them to find out what motivates and inspires them and then reflecting on the relevance of these lessons for themselves and the sector or an analytical piece that reflects on the issues in the sector.
Dialogue One	The relationship between values and personal knowledge and leadership style and success	Discussion with a range of leaders drawn from business, government, civil society and the religious sector on what inspires and motivates them
Block Two 5 day block	Problem analysis, strategy discernment and courage	Understanding the analysing problems using different tools  Visioning, determining priorities and crafting a strategy

Block	Key competencies	Programme
		<p>Understanding complexity and change processes</p> <p>Applying the strategy personally, organisationally, sectorally and in society.</p> <p>Communicating your road map so others feel inspired to follow</p> <p>Building alliances and partnerships</p>
Assignment	Analysis and reflection of the challenges facing the sector	The civil society sector is under-resourced and needs to be built to effectively play its role in the trio with the public and private sectors. Leaders will be asked to reflect on this challenge, unpack the problem and propose a strategy for dealing with the problem. This will be presented as an article for a journal.
Dialogue	The relationship between strategy and leadership	Discussion with key change agents from business and civil society on the relationship between strategy and leadership
Block three 5 day residential block	Crafting a plan for change	This block will bring together the reflections and tools applied in the previous blocks and focus on developing a change agenda for the region. Each participant will be asked to unpack their role in this plan and also to identify the support they will need in the journey.
Assignment	Draft a case study	Each participant will be asked to reflect on their various leadership roles and write up a case study that reflects on the problem, their leadership role and style, how the tools have been applied, the successes and weaknesses of the journey and the lessons for others.
Dialogue	Leadership lessons	A reflection on the five most important leadership lessons by a panel of leaders in the region and discussion on the relevance of these for the sector.
Block four	Annual Retreat	Participation in an annual retreat along with leaders from the public and private sectors that reflects on an aspect of change needed in the region and the leadership challenges associated with this.

Other services offered:

- On-line newsletter and blog
- Optional monthly telephonic coaching session around specific leadership challenges
- Attend quarterly leadership forum event in your region

Graduate programme

Leaders who have gone through the programme may want to further their involvement by participating in one of more of the graduate programme events:

- Annual leadership retreat focusing on a theme which provides leaders an opportunity to meet, share experiences, learn from one another and reflect
- Write think pieces for leadership for change newsletter
- Attending coaching programme to become a leadership coach to others in the sector

### ***Proposed partners***

As the programme will need to be a tri-lingual programme partnerships with an English, French and Portuguese speaking academic institution is proposed. For the English speaking institution, the University of Cape Town Graduate School of Business in South Africa is recommended. UCT has been involved in the initial thinking about the programme and is regarded as one of the premier business schools in the world and in the region. For the French speaking institution the University of Mauritius is recommended. Macoss, the NGO alliance is committed to building leadership and has offered to assist with forging such a partnership. For the Portuguese speaking institution, the University of Eduardo Mondlane is proposed. It is the top University in the country with links to the CSO sector.

## **5 Synergies with other Trust Programmes**

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Should the Trust proceed with a Leadership for Change programme there would be several synergies with its existing internal programmes. Some of these are listed below by way of example:

- Using a leadership lens to enhance the Drivers of Change Programme
- The work undertaken by the RPO on various thematic issues will form the basis of discussions on problem analysis and strategy development in block two
- The assignments could be used to link up decision makers and CSO leaders
- The discussions during the programme could be written up as case studies and offered to other management and leadership programmes, most of whom are very thin on good case study material
- Using the dialogue forums as a platform to identify needs, discuss issues and strengthen the dialogue around leadership in the sector
- The networks developed could be used to broaden the networks in different countries and collaboration in the sector

- Using the support provided to existing apex partners to document case studies which could be used on the programme
- The Trust could also use the programme to enhance its own leadership role in the region by running regular leadership articles to raise discussion and debate on leadership. Such articles could draw on the pool of experts on the programme and be profiled in the Trust newsletter, *Changé Mudança* and through the website.

## 6 Next steps

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It is proposed that meetings are initiated with each of the three proposed partners. Parallel to this a skeleton of the proposed course needs to be developed as a chopping block for an initial meeting. Following confirmation of the potential partners' interest, and Trust sign-off of an initial course outline, a round table workshop is proposed of the partners to refine the outline and agree on timelines for the programme. Once the outline is agreed and a timetable has been firmed-up for the launch of Leadership for Change, meetings with some of the more relevant programmes scoped in this report, such as the African Leadership Institute, are proposed.

Below is a proposed timeline for the next steps:

January	Initial meetings with possible partners
January	Development of skeleton outline of the course and initial case studies
February	Initial round table discussion
March	Development of business plan
April	Finalisation of partnership arrangements and timelines for the course
March – May	Detailed development of the course modules
March - May	Resourcing the plan
June	Sign off on the course programme
July	Launch of Leadership for Change
July	Recruitment for the first programme
October	First residential block