



THE ROLES THAT COACHING AND MENTORING PLAY FOR CHARITY CEOs

Research study findings

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FOREWORD

This is an extremely welcome paper that highlights the power of mentoring and coaching. It can be lonely as a charity CEO, and the research findings demonstrate that having a safe space to talk things through can be vital.

The calls we take at ACEVO as part of both our mentoring programme and our 'CEO in Crisis' service reveal not only a range of stark and pressing work-related pressures, but also the impact these have on the wellbeing of individual CEOs. Since Covid, leaders have hardly stopped juggling issues, and the cumulative impact is exhausting. The report outlines how coaching and mentoring not only provide support, but are springboards to new perspectives and opportunities.

This study is particularly important as it responds to the lack of research around coaching and mentoring for charity CEOs. It unpicks the benefits and boundaries of the two disciplines, and provides useful models and suggestions to guide their effective practice moving forward.

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INTRODUCTION

The last five years have been an extraordinarily difficult period for charities in the UK.

The Covid pandemic had an enormous impact on most charitable organisations, resulting in significant increases in the demand for their services, constraints on their operational activities and steep declines in their revenues^{1,2}. The problems have not ended there. The United Nations COP agenda, coupled with frequent extreme weather conditions, have highlighted the growing urgency of the climate crisis³. Other disruptions have arisen recently, including concern over the lack of racial and sexual diversity in charities^{4,5}, political rows about both their campaigning approach and the ‘anti-woke’ agenda⁶, and the outbreak of wars in Ukraine and the Middle East^{7,8}. The current cost of living crisis is causing further acute pressure on the commercial viability of many charitable organisations⁹.

Nowhere do these many challenges manifest themselves more intensely than for people serving in the role of charity CEO. Research evidence in the private sector suggests that coaching and mentoring can deliver significant benefits to CEOs in terms of their leadership performance and personal wellbeing^{10,11,12}. However, these practices appear to be under-utilised methods of personal support and development for charity CEOs^{13,14}. Very little academic research has been undertaken into the roles of coaching and mentoring in the UK charity sector¹⁵, and none at all into their use by charity CEOs specifically. To address this knowledge gap, a doctoral research study was initiated in 2021 by Andy Bird, an experienced coach and mentor, at the International Centre for Coaching and Mentoring Studies, Oxford Brookes University.

This report has been written to share the study’s conclusions with relevant stakeholders and other people interested in learning more. Its purpose is to help deepen the understanding of the roles that coaching and mentoring can play for charity CEOs and their organisations. By clarifying the contributions that coaching and mentoring can make, it is hoped that more leaders will have the opportunity to access these benefits. The impact has the potential to radiate from individual charity CEOs, through to the teams and organisations they lead, and, ultimately, to the social communities they serve.

Research contribution

This study breaks new ground by identifying:

- The challenges involved in leading UK charities from the perspective of charity CEOs
- The stakeholder networks which charity CEOs can use to support them in their roles
- The different types of behaviours that help distinguish between different forms of coaching and mentoring practice
- The different forms of coaching and mentoring relationships experienced by charity CEOs
- The impact of coaching and mentoring in helping to address the leadership challenges of charity CEOs

EXECUTIVE SUMMARY

The central conclusion from the study is that coaching and mentoring can play a significant and valuable role in helping charity CEOs address their leadership challenges.

The research was structured to focus on five areas of inquiry, and the key findings in each of these areas are as follows:

1. Leadership challenges facing charity CEOs

The leadership challenges facing charity CEOs manifest themselves at three levels (strategic, relational, personal). These challenges tend to be intense emotionally owing to the values-based motivation of most charity CEOs, and the concern that they and their many stakeholders feel for their charity's cause and its beneficiaries.

2. Sources of CEO support

Although charity CEOs can potentially obtain informal coaching and mentoring support from a wide variety of sources in their personal networks, they often do not benefit from as much assistance as they need. External coaches and mentors can play a distinctive role, providing someone independent with whom CEOs can consider challenges that are too emotive, complex or confidential to discuss openly with anyone else they know. However, engagement in this form of support can be limited by charity CEOs sometimes perceiving a need for it as a sign of weakness, and also by a sense that all available time and money should be focused on serving a charity's beneficiaries.

3. The meaning of coaching and mentoring

There is a lack of aligned understanding in the charity sector about the meaning of the terms coaching and mentoring. Clarity can be enhanced by being more explicit about the types of behaviours involved in four different forms of coaching and mentoring: 'non-directive coaching', 'skills coaching', 'mentoring' and a 'fluid' combination of all three.

4. CEO experiences of coaching and mentoring relationships

Coaching and mentoring enable charity CEOs to engage in a generative dialogue, in a safe reflective space, helping them to express emotion, stretch thinking, stimulate learning and generate change. Although charity CEOs experience different forms of coaching and mentoring relationships, it is not possible to assign distinct roles to each practice owing to a 'hybridisation' that is taking place between them.

5. The impact of coaching and mentoring

Coaching and mentoring have most impact for charity CEOs at a personal level, but the changes that result, in the ways CEOs see both themselves and the challenges they face, also generate important effects relationally with their stakeholders, and strategically for their organisations.

RESEARCH DESIGN

The aim of this study was to explore the roles that coaching and mentoring play in addressing the leadership challenges of charity CEOs in the UK.

Research questions

The following questions were defined to provide a structure for the analysis:

1. What are the most difficult leadership challenges facing charity CEOs?
2. What sources of support do charity CEOs use to help them address their leadership challenges?
3. What do people in the UK charity sector understand to be the similarities and differences between coaching and mentoring?
4. What characterises charity CEO relationships with external coaches and mentors in practice?
5. What impact do coaching and mentoring have in addressing the leadership challenges of charity CEOs?

Methodology

The research was undertaken with a constructionist/interpretivist philosophical stance¹⁶ and utilised qualitative case study methodology¹⁷. The case study was bounded¹⁸ by limiting the inquiry to the CEOs of charities which are:

- based in the UK
- generating annual income above £1 million
- classified as 'charities in law'
- registered with the Charity Commission

Data sources

29 semi-structured interviews were carried out with a variety of charity CEOs and other senior stakeholders in the UK charity sector, to obtain a range of different perspectives (see Table 1).

Although the sample cannot be described as representative of the charity sector as a whole, the research succeeded in including the voices of a diverse group of contributors in terms of gender, ethnicity, a variety of charity sizes and causes, and different lengths of CEO tenure.

Analysis was also undertaken of 14 documents and websites relating to the role of charity CEOs and the coaching and mentoring programmes available to them.

	Data source	Details
Interviews	Charity CEOs with experience of coaching & mentoring	12 interviews
	Community Interest Company CEOs	1 interview
	Charity chairs	3 interviews
	Coaches & mentors of charity CEOs	5 interviews
	Leaders of charity professional bodies	3 interviews
	Organisers of coaching & mentoring programmes for charity CEOs	5 interviews
Documents	Websites referring to coaching & mentoring programmes for charity CEOs	4 websites
	Documents relating to charity CEO roles and the coaching & mentoring programmes available to them	10 documents

Table 1: Data sources for the study

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1. Leadership challenges facing charity CEOs

“I’ve spoken to really long-serving stalwarts of the sector and I think lots of them agree, there’s never been a harder time to run a charity” (Leader, Professional body).

What makes charities different?

To fully appreciate the challenges involved in leading a charity, it is necessary first to understand what makes charities different from other organisations. Firstly, and most importantly, the *raison d’être* of charities is to deliver public benefits, not profit^{19,20}. The social concerns that charities seek to address are typically extremely difficult to overcome²¹. The goals involved are usually less tangible than financial goals, which can also make them difficult to measure²².

In addition, most of a charity’s revenue is typically generated from individuals or organisations who derive no direct economic benefit from the funding they provide²³. If private sector businesses do a good job creating value for their customers, they generate revenues that underpin their commercial performance and organisational survival. The same financial link does not exist for charities^{19,24}. This disintermediation between beneficiaries and funders means that a crucial priority for charities is to build trust, legitimacy and support for their work amongst potential donors and grant-makers^{24,25}.

Finally, unlike private sector companies, charities are not owned by shareholders²⁶. Instead, trustee boards are legally responsible for abiding by rules of governance which are overseen by the Charity Commission²⁷. There is typically a broader range of stakeholders involved in

managerial decision-making, and competing perspectives often exist on what success looks like²⁸.

A blurring of boundaries

It is important to acknowledge that there has been a blurring in the boundaries between private sector and charitable organisations in recent years²⁹. The shift in scale and profile of government funding has forced charities to compete for new sources of income, leading them to behave professionally and commercially more like private sector businesses^{30,31}. Conversely, in the private sector, perspectives on the purpose of business have been broadening beyond just making money for shareholders, to address more noble causes and the interests of a broader range of stakeholders^{32,33,34}. Nevertheless, despite these developments, the differences between charities and for-profit organisations remain significant.

Strategic issues facing charities

Academic researchers have identified a number of distinctive strategic issues which typically arise for charitable organisations^{29,30,35}.

- Addressing ambitious goals with limited resources^{21,35,36}
- Balancing mission ‘stickiness’ with ‘drift’^{19,23,29}
- Driving innovation in culturally resistant organisations^{37,38,39}
- Engaging a complex range of trustees, staff, and external stakeholders^{22,29,40}
- Ensuring social diversity and inclusion^{4,30,41,42}
- Building public trust and accountability^{23,28,29}

The diversity of the charity sector

A key contribution of this study has been to investigate, for the first time, the challenges involved in leading a charity *from the perspective of charity CEOs*. This was not a straightforward task. The UK charity sector is extremely diverse, consisting of organisations with an extensive range of income levels, staffing approaches and charitable causes. Different CEOs therefore lead organisations with very different commercial, geographic and cultural characteristics³⁰. This diversity extends to the demographic and experience profiles of CEOs themselves¹³.

Another aspect of the diversity of charity CEOs is the different motivations and mindsets brought by different individuals. An important insight from the study was that these characteristics have an influence on both the nature of the challenges that each CEO faces, and the effect these challenges have on them personally. The most important considerations were the extent to which a CEO:

- focuses their working life serving a specific cause, as opposed to building their career by moving across sectors and causes over time.
- perceives leadership to be about the 'heroic' role they play personally, or more to do with the way they share the responsibility with other stakeholders.
- views their own weaknesses or mistakes as failures, rather than opportunities to learn and grow.
- feels positive and excited about the challenges they face, versus feeling anxious, dispirited and potentially even overwhelmed by them.

The research indicated that these motivations and mindsets have a particular influence on the ease with which CEOs engage their colleagues, and also the extent to which they thrive personally in their leadership roles.

Key CEO leadership challenges

Despite this diversity, some consistent themes were found in the key leadership challenges faced by charity CEOs. These were found to manifest themselves at three levels: strategic, relational and personal.

Strategic challenges

A fundamental challenge for most CEOs is to maintain the financial viability of their organisations. The extremely hostile conditions of the past few years have caused big increases in the demand for most charity services, but at the same time they are also increasing costs and reducing the availability of resources to support service provision⁹. As a result, many smaller charities are fighting for survival. Several CEOs described the intense pressure they feel under to "*keep the show on the road*" or to "*keep the lights on*".

For the leaders of larger charities, these commercial threats tend to be less existential. However, the downward pressure and uncertainty concerning both government funding and public donations is still a constant worry.

A frequent consequence of this intense short-term strain is that charities can sometimes lose sight of their core purpose and longer-term imperatives. A second crucial challenge, therefore, is for CEOs to clarify these strategic priorities and to align their organisations around meeting

them in practice. Many stakeholders stressed the importance of "*looking ahead*" and "*seeing the big picture*", thereby ensuring that challenges such as diversity and inclusion, digitalisation, AI, and net zero commitments are tackled effectively over time.

Relational challenges

A CEO cannot address these strategic issues without the support of other stakeholders, and two challenges emerged from the research that were more relational in nature. The first is for CEOs to influence governance arrangements by establishing effective ways of working with their board. The ambiguity of strategic and operational responsibilities in a charity means that the quality of the personal relationships between a CEO and their trustees, particularly their chair, become critical⁴³.

The second relational challenge is to build engagement with a complex range of internal and external stakeholders, many of whom come at things from different and strongly-held perspectives²⁸. Several examples were shared of situations in which CEOs had been left feeling frustrated, or even angry, at the lack of support they were receiving externally from certain government, community, trade union or funding bodies.

A contrasting and surprisingly common problem was encapsulated by a CEO who described how difficult it can be "*leading people who are passionate*". The values-based motivation of charity staff results in people wanting "*a stronger stake in decision-making*", which results in a need "*to consult more and communicate more*" in the charity sector.

Personal challenges

CEOs are often caught between the team they lead and the board they report to, with no immediate peers they can talk to openly about sensitive issues. As a result, their core personal challenge is to 'lead' themselves^{44,45}, by choosing to alter their attitudes, actions and behaviours in ways which enable them to handle their responsibilities as effectively as possible.

Charity CEOs have to deal with a constant, unrelenting volume and variety of issues. These workload problems are often exacerbated by a lack of managerial capacity and expertise in a CEO's team, in all but the largest charities. The values-based nature of charities also fuels intense public scrutiny, and several examples were quoted of CEOs facing bitter personal abuse on social media and in the press.

Ultimately, these various pressures require that CEOs are able to manage their own wellbeing, resilience and career planning. If CEOs are not addressing these personal challenges effectively, their capacity to handle their relational and strategic challenges is much reduced.

Emotional intensity

Figure 1 summarises the leadership challenges facing charity CEOs in the UK. One important insight to highlight at a general level is that these challenges seem to be relatively intense emotionally. This can be explained by the values-driven nature of most charity CEOs, and the heartfelt concern that they and their stakeholders feel for their charity’s cause and its beneficiaries.

“When things aren’t going well, the implications are much greater than a P&L or some numbers on a spread sheet. And they aren’t about me and my career. They’re about knowing that, in my case, disabled children are waiting for help. It takes its emotional toll on you” (CEO).



Figure 1: The leadership challenges facing charity CEOs in the UK

2. Sources of CEO support

CEO support networks

Given the challenges just described, charity CEOs can potentially obtain support from a wide range of people in their network. Figure 2 captures the potential sources of assistance referred to in the study. However, despite these many opportunities, most stakeholders expressed a view that charity CEOs often do not have as much personal support in place as they need.

“I think I’m probably not as good at asking for support as I could be. When you talk about what I have, it’s actually not that much” (CEO).

The factors found to influence the way in which different leaders engage with their own networks include their personal self-confidence, their openness to learning, and the extent to which they trust and respect their various contacts.

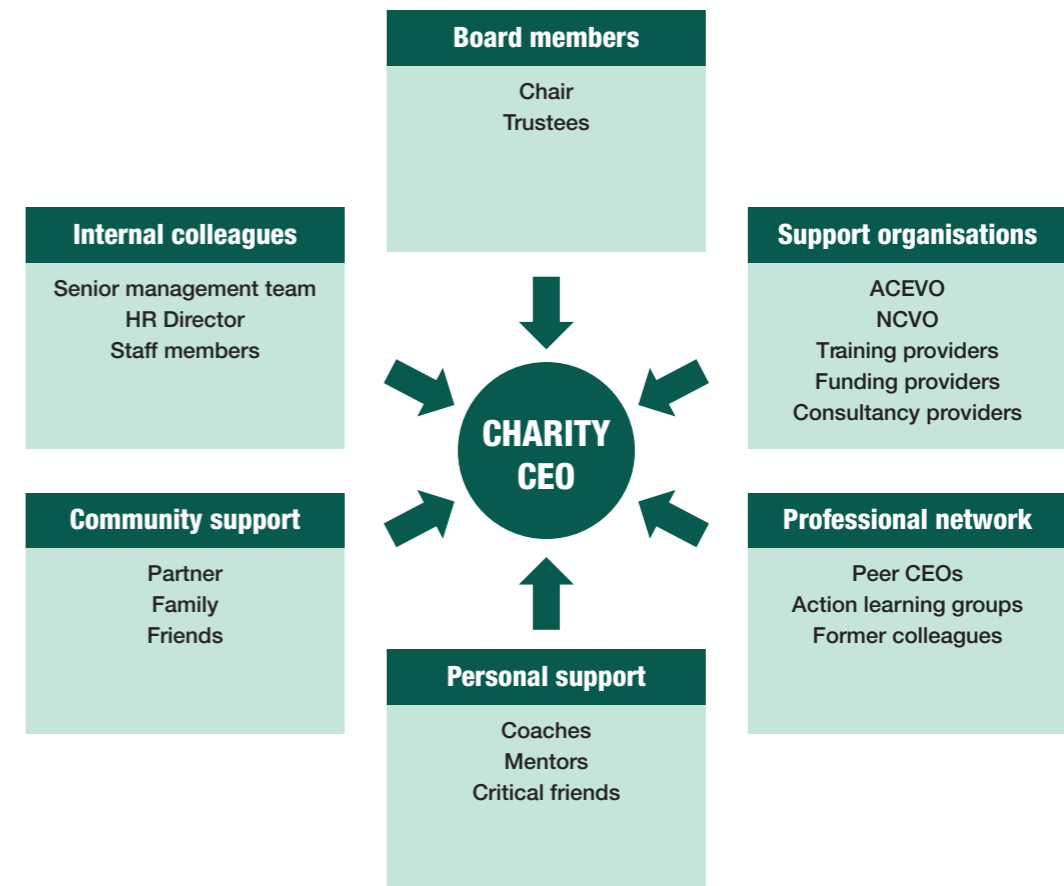


Figure 2: Potential sources of CEO support

Informal coaching and mentoring

In the case of external coaches and mentors, relationships are established by a CEO with the specific purpose of obtaining coaching or mentoring support. However, many coaching and mentoring conversations take place more informally in the context of different types of stakeholder relationships, such as with a chair or trustee, a colleague, peers in another charities, partners in support organisations, or even family members and friends^{46,47}.

One CEO argued that to benefit fully from the relationships available to them, CEOs need to be “open to listening and ideas” and “good at taking feedback”. He also stressed that “everybody in the organisation has wisdom and knowledge they can add”, so coaching and mentoring shouldn’t be understood as just a “formal” activity with external experts. A coach from one professional body advocated “developing what I call a professional posse”, a diverse group of people who can support CEOs in different ways depending on their needs at any given time.

One particularly significant source of support for a CEO is the chair of their charity, although experiences of this relationship seem mixed. One CEO described how her chair “absolutely nails the way that she balances the governance and support for me”.

Other chairs strike this balance less successfully, focusing primarily on holding CEOs to account for their performance. There seems to be an opportunity for chairs to make greater use of coaching and mentoring in their conversations with CEOs, thereby enhancing their support for them both intellectually and emotionally⁴³.

The role of external coaches and mentors

Within their overall stakeholder network, CEOs see a distinctive role for external coaches and mentors in helping them address their leadership challenges. Many of the issues that CEOs face are too complex, emotive or personal to discuss freely with their usual contacts⁴⁸. The most important role of external coaches and mentors, therefore, is that they provide a safe space in which CEOs have time to reflect, to consider their emotions and to talk through their most awkward and sensitive concerns.

This is made possible by these partners being external and independent, which means that they do not have any conflicting agendas or relationships. Effective coaches and mentors also possess relevant expertise or experience, as well as a behavioural style, which enables them to consider a CEO’s various challenges with them in a meaningful way.

Triggers and barriers to using external coaches and mentors

The triggers and barriers involved with a charity CEO seeking support from an external coach or mentor are captured in Table 2. Times of transition or difficulty are the circumstances that most frequently prompt CEOs to seek external one-to-one support. In particular, several CEOs described seeking a coach or mentor when taking on a new CEO position. Other common triggers include suggestions by board members and peers, or opportunities provided by charity partners, funders and leadership programme providers.

The most significant obstacle to charity CEOs using an external coach or mentor seems to be a concern over the scarcity of resources in a charity, and the need to channel all available time and money into serving its beneficiaries.

A CEO spending money, and potentially even just time, on their own personal development and support, often leads to feelings of self-indulgence and guilt.

“We do things on a shoestring and we don’t like to waste money, and particularly not waste money on ourselves. So it’s seen as a luxury both timewise... and in terms of money” (CEO).

Another cultural constraint in the charity sector is that if a CEO admits to needing support, it can be interpreted as a sign of weakness, and a recognition that there are shortfalls in their capabilities and performance that need to be put right. A chair explained that an offer to arrange coaching support for a CEO can often be seen as “a criticism of their performance”. She went on to explain that CEOs often feel that “I’m being paid to be the chief executive, I should know what I’m doing”. For coaching and mentoring to be embraced more fully, a less defensive and remedial perspective would be helpful⁴⁹.

Triggers	Barriers
Times of transition: <ul style="list-style-type: none"> ▪ Becoming a CEO for the first time ▪ Moving into a new CEO role ▪ Seeking to move on from a CEO role 	Lack of awareness or understanding: <ul style="list-style-type: none"> ▪ Not clear about what coaching or mentoring involves ▪ Unsure how to go about getting relevant support
Times of difficulty: <ul style="list-style-type: none"> ▪ Struggling at a personal level ▪ Concerns over personal performance or impact ▪ Experiencing relationship difficulties ▪ Facing a particular challenge for the first time ▪ Moments of organisational crisis 	Don't see the need: <ul style="list-style-type: none"> ▪ Belief in own abilities ▪ Comfortable with support already in place ▪ Doesn't suit personal learning style ▪ Poor previous experience
Recommendation by a chair, trustee or peer <ul style="list-style-type: none"> ▪ To support personal development or wellbeing ▪ To address a performance concern 	Sign of weakness: <ul style="list-style-type: none"> ▪ Concern about appearing not up to the job ▪ Assumption that a CEO ought to have all the answers ▪ Not wanting to ask for help ▪ Coaching and mentoring seen as remedial not developmental
Offered by charity partner or funder: <ul style="list-style-type: none"> ▪ To help enhance charity performance 	Poor organisational support: <ul style="list-style-type: none"> ▪ Lack of chair/trustee commitment to CEO personal development ▪ Concern over coaching serving chair's agenda, not CEO's
Attending a leadership development programme: <ul style="list-style-type: none"> ▪ To help support and integrate learning 	Fear of self indulgence: <ul style="list-style-type: none"> ▪ Concern about wasting charity time and money on oneself ▪ Sense of personal martyrdom for the cause

Table 2: Triggers and barriers to the use of external coaches and mentors by charity CEOs

3. The meaning of coaching and mentoring

Unclear distinctions between the two disciplines

To explore more deeply the roles that coaching and mentoring play in helping charity CEOs address their leadership challenges, the study needed to determine what stakeholders in the charity sector understand the terms coaching and mentoring to mean. When the interviewees were asked for their opinions, their immediate responses included phrases such as: “that classic question”, “gosh, that’s difficult” and “I think it’s very confused”.

Some interviewees were quite happy to admit that they cannot explain the differences between coaching and mentoring. In other instances, individuals had firm views on the subject, but their stances were often not consistent with each other. This lack of clarity reflects a consensus amongst academic researchers that coaching and mentoring are confused and contested terms^{50,51,52}. The confusion matters, with a few stakeholders arguing that it limits the usage of coaching and mentoring in the charity sector. A risk also exists that a CEO and their coach or mentor might not have the same expectations about the role of their relationship, a situation that is known to reduce the effectiveness of coaching and mentoring engagements⁵².

“I find it difficult to say what I do. I call it mentoring, but others could easily call it coaching” (Mentor).

Similarities between coaching and mentoring

Despite this apparent lack of alignment, several widely accepted similarities between coaching and mentoring did emerge from the research (see Table 3).

“Good coaches or mentors will provide a framework for your discussions without dictating content, so that the agenda is yours to set, creating a space for you to ‘unpack’ the things about your role that are really troubling or exciting you” (Association of Chairs⁴³)

Purpose	<ul style="list-style-type: none"> Enhance professional development and personal growth Build confidence and capability Improve leadership performance
Activities	<ul style="list-style-type: none"> Listening, supporting, questioning, challenging, generating options, planning actions
Principles	<ul style="list-style-type: none"> Conversations in the context of relationships Safe space to reflect Emotionally supportive, intellectually challenging Commitment to confidentiality Client owns the agenda and responsibility for action Contracting required to establish boundaries

Table 3: Perceived similarities between coaching and mentoring

Differences between coaching and mentoring

When it came to the distinctions between coaching and mentoring, the key theme that arose was that mentoring involves the use of experience to help someone in a way that is different from coaching.

“I think mentoring, for me, is much more about sharing experiences, sharing learning, helping to develop somebody in terms of just showing them what are the possibilities of doing things differently” (Chair).

However, it is much more difficult to describe the ways in which coaching is seen as distinct from mentoring, for two reasons. Firstly, whilst most stakeholders described coaching as less directive than mentoring, some argued that coaching is more directive, because it involves giving instruction on how to carry out certain tasks more effectively. Secondly, the practice of mentoring is not only about sharing experience, it also involves various coaching behaviours like listening and questioning, so the two disciplines seem to be inherently entangled.

Four forms of coaching and mentoring

An important insight to emerge from the research was that focusing on coaching and mentoring as types of behaviour can help bring greater clarity to the roles they play. Four forms of coaching and mentoring were identified, each characterised by different types of behavioural intervention.

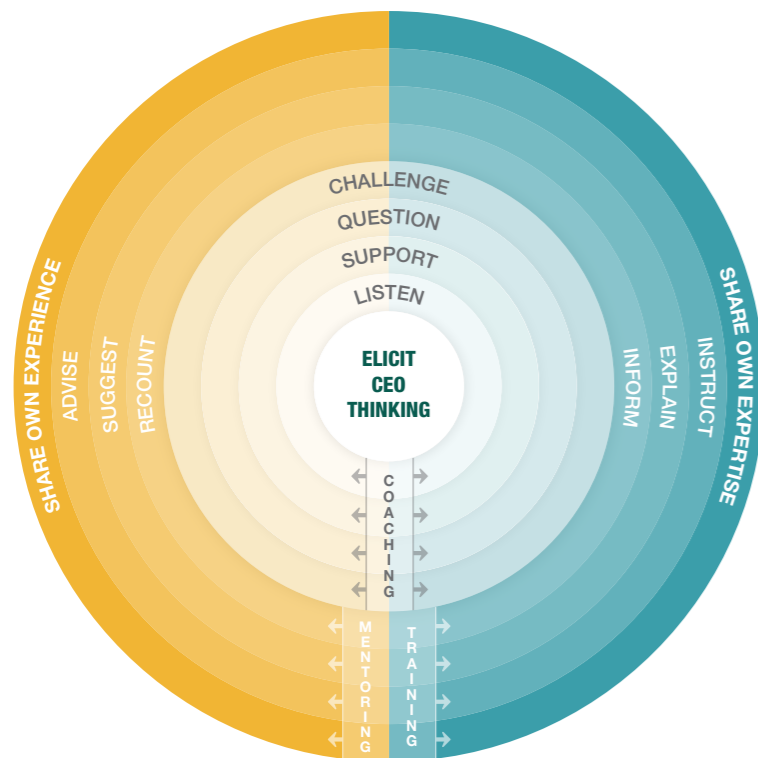
‘Non-directive coaching’ is understood to involve ‘coaching’ behaviours, such as listening, supporting, questioning and challenging. Many stakeholders referred to this approach as ‘pure’ or ‘clean’ coaching. This form of coaching focuses on eliciting the client’s own thinking, and it is based on the principle that the client already has all the resources they need to unlock their challenges themselves.

The practice of **‘mentoring’** also involves ‘coaching’ behaviours extensively, but adds the more directive ‘mentoring’ behaviours of recounting stories, suggesting ideas and giving advice. The role of these additional behaviours is to stretch the client’s thinking even further by sharing the mentor’s own experience.

There is also a different form of coaching which helps clients develop new technical knowledge or professional skills⁴⁹. For charity CEOs, this **‘skills coaching’** typically focuses on building their leadership capabilities. ‘Skills coaching’ also uses ‘coaching’ behaviours, but adds a form of ‘training’ for the CEO. This involves the coach sharing their own expertise, by using the more directive behaviours involved in informing, explaining and instructing a CEO on how to do the things they want to learn.

The final form of coaching and mentoring is a **‘fluid’** approach, in which the coach or mentor draws freely from the full range of ‘coaching’, ‘mentoring’ and ‘training’ behaviours. In addition to eliciting the client’s own thinking, they also share their personal experience and expertise to help the CEO address their challenges in whichever way seems most appropriate at the time.

Figure 3 visualises the interrelationship between these various behaviours, and provides a two-dimensional spectrum for distinguishing between different types of coaching and mentoring intervention. It differs from other directive/non-directive models featured in the coaching and mentoring literature, by highlighting the different types of directive behaviour involved in sharing professional experience versus sharing technical expertise^{54,55}.



The model illustrates that ‘non-directive coaching’ involves just the ‘coaching’ behaviours in the inner circles (listen, support, question, challenge). ‘Mentoring’ uses these coaching behaviours too, but adds the more directive ‘mentoring’ behaviours in the outer left-hand circles (recount, suggest, advise). ‘Skills coaching’ also uses the ‘coaching’ behaviours in the inner circles, but augments them with the ‘training’ behaviours in the outer right-hand circles (inform, explain, instruct). A ‘fluid’ approach responds flexibly to the various needs of clients by using all the behaviours in the various circles.

The terms used in the framework to distinguish the different categories of behaviours – ‘coaching’, ‘mentoring’ and ‘training’ – reflect the words that most research participants used to describe the different modes of behaviour involved in coaching and mentoring activities. However, it must be acknowledged that even these titles are social constructions and may not resonate with everyone. What matters, therefore, is that by specifying the range of behaviours clearly, any inconsistencies in the way that people are interpreting the activities underway can be easily resolved.

By understanding the different forms of coaching and mentoring in this way, it becomes possible to assess the roles that different forms of coaching and mentoring play in addressing the leadership challenges of charity CEOs.

Form of coaching & mentoring	Non-directive coaching	Mentoring	Skills coaching	Fluid
Colour reference				
Type of behaviours	Coaching behaviours (inner circles only)	Coaching and mentoring behaviours (left hand side, inner and outer circles)	Coaching and training behaviours (right hand side, inner and outer circles)	All behaviours (left and right hand side, inner and outer circles)

Figure 3: The spectrum of coaching, mentoring and training behaviours.

4. CEO experiences of coaching and mentoring relationships

Distinctions between the four forms of coaching and mentoring

As explained earlier, although charity CEOs can engage in coaching and mentoring conversations with many people across their support network, there is only one type of stakeholder with whom their relationship is defined by its sole focus on coaching and mentoring. To understand the different roles played by these external coaches and mentors, it was necessary to examine the recent relationships that charity CEOs have experienced with them in practice.

This analysis was guided by a framework developed by Stokes, Otter & Fatien Diochon⁵⁶, which identifies four contextual dimensions involved in one-to-one coaching and mentoring relationships (i.e. learning objectives, economic arrangements, time frames, coach/mentor skillsets).

The distinctive characteristics associated with the four forms of coaching and mentoring just described (i.e. mentoring, non-directive coaching, skills coaching and a fluid combination of all three), were evident in the variety of relationships in which charity CEOs have been engaged. The most important distinguishing factors seemed to be the types of learning objectives and the skill and experience profiles of the coaches or mentors involved.

‘Non-directive coaching’ relationships focus on helping CEOs to work through their challenges for themselves. Special attention seems to be given to helping them manage their own emotions and

those of others. In the context of the charity sector, a likely driver of this characteristic is the relatively intense emotional nature of the challenges that CEOs face. A consequence is that the professional coaches involved often have additional training in psychological or relational techniques⁵⁰.

‘Skills coaching’ tends to be most oriented towards leadership development. The relative lack of leadership training and career pathways provided for high-potential managers in the charity sector means that first-time CEOs often need some support in this area⁵⁷. This form of coaching typically requires coaches with leadership expertise and experience, and it is also the one that is most likely to be paid for.

‘Mentoring’, on the other hand, is more concerned with broadening the perspectives that CEOs bring to their leadership challenges. This is often done by engaging with a mentor who has charity experience. However, many charity CEOs also value the opportunity to learn from the private and public sectors, too. The career profile of a mentor is, therefore, a key determinant of their potential to add value, and ‘mentoring’ is also most likely to be offered on a pro bono basis.

Finally, in relationships that are more ‘fluid’ in nature, the agenda tends to focus on responding to the various challenges that arise for CEOs over time. In this scenario, coach-mentors require a suitable blend of coaching skill and leadership experience and expertise.

The hybridisation of coaching and mentoring

Having highlighted some distinctions between the four forms of coaching and mentoring, it is important to keep these in perspective. The reality in practice is that the differences between them are blurred, and there is strong evidence to suggest that a 'hybridisation' is underway between coaching and mentoring⁵⁸.

At a behavioural level, the discussion involved in many conversations often seems to involve a range of interventions, not just the type associated with that particular form of coaching and mentoring⁵⁹. Taking into account Stokes *et al.*'s four relationship dimensions, all four forms of coaching and mentoring tend to address a combination of both performance and learning/growth objectives. There is also a trend towards most mentors and coaches having a blend of relevant leadership experience and professional coaching expertise, rather than one or the other. Many relationships are typically provided pro bono, or at least at discounted rates compared to the private sector. Finally, although coaching contracts usually begin with short 6-month terms, they often extend to last several years, like mentoring relationships.

Interestingly, the root causes for this hybridisation seem to lie in the distinctive features of a charity CEO's role. For example, the social purpose-oriented nature of charities makes CEOs less willing to invest their organisation's financial resources in coaching and mentoring than in the private sector. It also makes some coaches and mentors more willing to offer their time pro bono or at lower rates, as their personal values incline them to give something back to

society. Both these factors help to explain the blurring in the typical economic differences between coaching and mentoring arrangements for charity CEOs.

To provide another example, the lack of distinction between the timescales involved in coaching and mentoring relationships can be traced back to the structural isolation of a charity CEO's role and the emotive nature of many of the issues they face. The difficulty of discussing these issues freely with their other personal contacts means that, once a CEO has built a trusting relationship with a coach or mentor, it is a natural evolution to use them as a helpful confidant and sounding board on an ongoing, long-term basis. Evidence from other research studies, beyond the charity sector, indicates that relationships of this type are much more common at senior executive levels than is commonly understood in the coaching profession^{60,61,62}.

The similar roles of coaching and mentoring

In summary, whilst it is helpful to be cognisant of the differences between forms of coaching and mentoring, defining distinct roles for them in addressing the leadership challenges facing CEOs is not possible, and would be potentially misleading^{56,58}. For these reasons, this study would not be complete if it only focused on the different roles of coaching and mentoring. It is just as important to understand the similarities in the roles that they play for charity CEOs.

When seeking the commonalities across the four relationship types, further evidence emerged of the unique value of the safe reflective space provided by relationships with external coaches and

mentors. Stakeholders involved in all forms of coaching and mentoring referred to the value of an external coach or mentor's independence, and the fact that confidential, non-judgemental conversations are possible regarding topics that cannot be discussed as openly with anyone else.

In addition, a new insight arose about the central role of the 'dialogue' that takes place between a CEO and their coach or mentor in this space. Several CEOs expressed a preference for what one interviewee described as "active" and "dialectic" conversations, in which there is a "to and fro of ideas and throwing things together" in a search for "the right way to go forward". This kind of dialogue is not just reflective, but generative^{63,64}. It enables CEOs to find new ways of framing and approaching their challenges, thereby creating new pathways and narratives for action.

Four key themes

When it comes to the roles that all forms of coaching and mentoring seem to have in common in addressing the leadership challenges of CEOs, four themes emerged from the data analysis.

1. Express emotions

Given the intense emotional strain on most charity CEOs, coaching and mentoring sessions provide a crucial opportunity to get things off their chests and express their feelings to someone else^{65,66}. CEOs talked in the interviews about needing a "release" or "escape valve", which enabled them to "offload" and "share their fears and concerns". The emotional support, empathy, and kindness shown by a coach or mentor is a great source of comfort and energy to many charity CEOs.

2. Stretch thinking

CEOs value not just having the time to think, but also having someone there to challenge them to think more deeply and expansively⁶⁷. Most enjoy being able to problem-solve and troubleshoot with someone who understands their situation. At times, when in mentoring mode, a coach or mentor might feed in ideas and experiences of their own to open up new possibilities. At others, when in training mode, they might provide technical insight about how to go about doing something in practice. In all cases, coaches and mentors ask provocative questions to help CEOs push their own reflection further, stimulating them to think in new ways and from different perspectives.

3. Stimulate learning

'Skills coaching' is particularly focused on building new technical knowledge and skills. However, even in the other forms of coaching and mentoring, there were many examples quoted of coaches and mentors helping charity CEOs to learn by signposting useful reading and sharing tools or research. In a similar way, although 'mentoring' is oriented more towards learning from someone else's experience, several instances were quoted in other relationship types when coaches and mentors had also shared their own wisdom to enhance their client's awareness.

Perhaps most importantly, in all forms of coaching and mentoring, CEOs learn more about themselves. One mentor saw a significant part of his role being to help "draw out" the client's awareness and confidence in their own experience and expertise, as opposed to just sharing his own. As one CEO observed, "from a leadership perspective, self-awareness is absolutely critical".

4. Generate change

The impact of coaching and mentoring for charity CEOs is ultimately determined by their roles in generating change in their mindsets, actions and behaviours. Without this impact, a CEO's ability to address not just their personal challenges, but also their relational and strategic challenges, will be unaffected. When reflecting on his coaching, one CEO observed that *"sessions work best for me"* when the discussion *"ferments"* for a while and then you come back and start to *"change practice, change your behaviour, change the way you're thinking"*. Another related role that coaching and mentoring can play is boosting a CEO's *"sense of agency"* in the way they go about things.

"What brings everything together? I think it's that feeling of agency, that they feel more confident doing their job"
(Leader, Professional body).

Potential pitfalls

There was a strong belief amongst all the stakeholders that the roles that coaching and mentoring play can be significant, but it is important to note that the potential benefits are not always realised. Before moving on to assess the impact of coaching and mentoring in addressing the leadership challenges of charity CEOs, Table 4 highlights some pitfalls which can sometimes undermine the effectiveness of the two disciplines.

Pitfalls	
Poor matching	<ul style="list-style-type: none"> A coach or mentor lacks the necessary skills or experience to address a CEO's key challenges Weak personal chemistry and rapport
Poor contracting	<ul style="list-style-type: none"> Unclear initial scope and objectives for the work Misalignment in expectations about the nature of the work Lack of recontracting as the relationship evolves over time Poor balance in conversations between a CEO's strategic goals and their immediate issues and concerns Unproductive relationships not brought to a close quickly
Poor balance between personal and organisational needs	<ul style="list-style-type: none"> Working to the chair's agenda rather than the CEO's Working in a bubble with the CEO without sufficient input from their colleagues Conflicts of interest with other stakeholders such as funders or beneficiaries Insufficient attention given to succession planning if a CEO decides to move on
Too directive	<ul style="list-style-type: none"> A coach or mentor attempts to influence a CEO's thinking and activities too forcefully A coach or mentor talks too much A mentor is more concerned with sharing their wisdom than eliciting the thinking of their CEO client The advice a mentor provides is inappropriate or unrealistic given the unique context in which the CEO is working
Lack of commitment & accountability	<ul style="list-style-type: none"> A CEO dedicates too little time and energy to the relationship A CEO lacks the self-awareness or openness to fully engage in the relationship The relationship becomes too friendly and insufficiently professional or challenging
Dependency	<ul style="list-style-type: none"> A CEO relies too heavily on their coach or mentor for support and direction A coach or mentor relies too heavily on working with their CEO client for financial or psychological reasons

Table 4: Pitfalls involved in coaching and mentoring relationships for charity CEOs

5. The impact of coaching and mentoring

Every one of the stakeholders interviewed stated that coaching and mentoring can play an extremely valuable role in helping charity CEOs address their leadership challenges. Many of the CEOs asserted that their investment of time, and in some cases money, had made a big difference not just to their own performance, but to that of their organisations too.

"It's helped me navigate and tackle some of the thorniest challenges I've faced in the last five and a bit years, and I think we would be in a worse place as an organisation if we hadn't made that investment"
(CEO).

The impact of coaching and mentoring in addressing the different strategic, relational and personal leadership challenges facing charity CEOs is summarised below.

Strategic challenges

In a review of the various objectives that CEOs bring to their work with external coaches and mentors, fewer mentions were found of strategic challenges than relational and personal challenges. Indeed, a few CEOs stated that they did not cover strategic issues in their coaching conversations at all. One CEO explained that *"problem-solving and strategy are what I'm good at"*. Another reflected that *"I suppose I talk about that quite a lot with the board and with my leadership team"*.

However, some CEOs did make references to coaching and mentoring helping them to 'maintain viability'. As an example, one described the role of her coach in helping her consider the case for closing down shops and social enterprise projects. She confessed to approaching the issue initially in a *"heart-over-head"* manner and she valued how he *"took me through a really rigorous decision-making matrix"*. Several other stakeholders described the value to a CEO of a coach or mentor during times of financial difficulty, helping them to keep things in perspective, sense-check decisions and prepare communications to their team.

When it comes to 'clarifying priorities', a significant contribution of coaching and mentoring for many CEOs is what one described as enabling them to *"step back and think about the strategy as a whole, and get ahead on some of the thinking"*. Several stakeholders talked about the importance of prompting CEOs to think longer term and more systemically. One coach emphasised the responsibility he feels for challenging CEOs to consider their potential role in addressing macro issues such as environmental sustainability. Others highlighted the value of sharpening CEOs' clarity of purpose, asking what one programme organiser described as *"what it is they're all about, what it is they stand for, and then how they might articulate it"*.

Relational challenges

More references were made to the impact of coaching and mentoring in helping CEOs to handle their relational challenges. With regard to ‘influencing governance’, several stakeholders explained how CEOs had become clearer about their role and their ways of working. One particularly important factor in helping CEOs to address their governance challenges is building their confidence levels.

Other benefits highlighted were that CEOs had come up with tactics to manage difficult board members and to improve their relationships with their chairs. Some had learned more productive ways to present arguments and proposals to their board. For a few with ineffective board dynamics, they had valued the opportunity to talk through politically astute ways to change the profile of their trustees, even though this was not their official role.

“Part of it has been her working together with whoever has been in the Chair seat to bring in trustees who are more supportive and helpful, both in terms of style and behaviour, but also in terms of their backgrounds” (Coach).

The CEOs in the study spoke frequently about the impact of coaching and mentoring in helping them to ‘build engagement’. A core challenge for most of them is learning how to handle the emotion at play, both other people’s and their own.

“I was trying to remove my emotional response, or my response to either an individual or a situation and take the meta position. I’d always get my coach to do that with me.” (CEO).

One frequently mentioned benefit was the support provided for CEOs in conducting difficult conversations to address poor performance and to hold people to account. Several CEOs talked about having addressed personal relationship issues with key members of their team, as well as strengthening leadership team dynamics more generally.

Other ways in which coaching and mentoring have contributed to team effectiveness have been through improving delegation skills and through the CEO developing a coaching style themselves, to build other people’s leadership capabilities. Coaches and mentors have also helped CEOs to consider how they can engage their teams in broader organisational change.

Personal challenges

Whilst coaching and mentoring clearly deliver benefits in strategic and relational terms, their most fundamental contribution for CEOs seems to occur in addressing the personal challenge of ‘leading self’. Indeed, in many ways, it is the impact that coaching and mentoring has personally for CEOs that enables them to step up and embrace their relational and strategic challenges more effectively.

Most of the stakeholders referred to the fact that a core benefit of coaching and mentoring is building a CEO’s self-confidence. A lot of the work involved in strengthening this self-belief involves exploring one’s personal values and strengths, reflecting on what it means to be a more authentic and resilient leader.

“That is a big outcome of our programmes, people saying that they feel more confident, they feel less alone, and also they feel reassured that they’re doing the best that they can in sometimes very difficult circumstances” (Programme organiser).

Given the influence of a CEO’s motivations and mindsets in shaping their perceived challenges, greater self-awareness about these factors is also a significant advantage. One CEO described how he had started out *“in a hurry to make a difference”*, adopting a *“pacesetting”* leadership style. His mindset has since shifted to focus more on *“creating the conditions for success”*, by *“setting the right tone”* and *“creating an inclusive environment”*.

One especially powerful shift in mindset that can sometimes take place is when a CEO becomes more understanding and compassionate towards themselves.

“They become much less hard on themselves, much more forgiving of themselves, as opposed to personalising and individualising all the challenges that we talked about. And that, I think, can be an enormous relief” (Coach).

‘Coaching’ behaviours seem to play a central role in helping CEOs to handle this kind of self-reflection. This approach also helps them to become more mindful about the way in which they engage with others. Several described how they now manage their behaviour more consciously to have a positive impact on those around them. Another CEO explained how he had become *“much more deliberate”* in the way he comes across. He went on to specify *“the way that I’m using body language, the way that I sit in a chair in meetings. I’m constantly aware of all of those things”*.

Many CEOs described their coaching and mentoring sessions as being *“energising”*, and making an important contribution to their sense of wellbeing. They often use their sessions to work through issues of work–life balance and any concerns they might have about maintaining their physical fitness and health.

“You can’t pour from an empty cup...you have to look after yourself or you can’t be any good to anybody else” (CEO).

Part of this self-care and development also includes looking after one’s own future career. Most CEOs appear to use their coaches and mentors to help them to reflect on the potential journey ahead, and the ways in which they can best transition out of their existing roles when the time comes.

Summary

A framework is presented in Figure 4, summarising the roles that coaching and mentoring play in addressing the leadership challenges of charity CEOs in the UK. It refers to the key leadership challenges identified in the study, and lists the related benefits provided by coaching and mentoring in each case. The way in which these benefits are obtained is illustrated at the base of the framework. The ‘generative dialogue’ that takes place, in the ‘safe reflective space’ provided by a coach or mentor, enables four roles of coaching and mentoring to occur: ‘express emotion’, ‘stretch thinking’, ‘stimulate learning’ and ‘generate change’.

The framework portrays how the impact of a CEO’s coaching and mentoring begins for them at a personal level, by helping them to ‘lead self’ more effectively. The benefits then ripple out to help them address their challenges at a relational level, by enabling them to better ‘influence governance’ and ‘build engagement’ with a diverse range of values-driven stakeholders. Ultimately, the benefits play out at a strategic level, helping CEOs to find new ways to balance the pressure they are under to ‘maintain viability’ and ‘clarify priorities’.

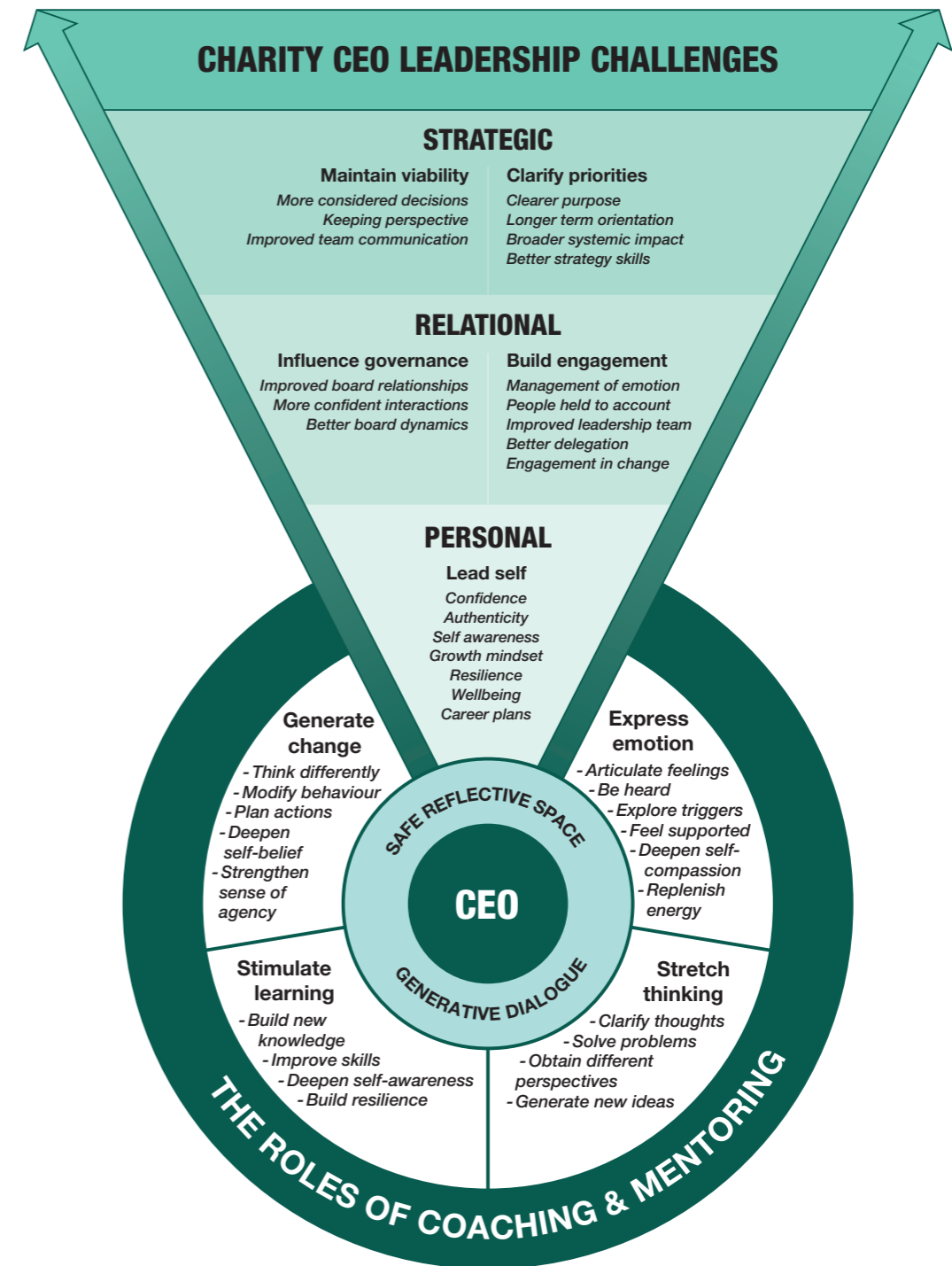


Figure 4: A framework of the roles that coaching and mentoring play in addressing the leadership challenges of charity CEOs in the UK.



IMPLICATIONS FOR PRACTICE

This research study has shown that when coaching and mentoring relationships are successful, they deliver significant benefits to charity CEOs and the organisations that they lead.

Enablers of productive relationships

Whilst coaching and mentoring *can* be of value, it is important to acknowledge that this is not *always* the case. A significant contribution of the study is also to identify some practical steps that can be taken by charity CEOs and their coaches and mentors to build more productive working relationships.

Table 5 (overleaf) summarises the suggestions made to strengthen the quality of engagements, and to avoid the potential pitfalls identified earlier in Table 4. These steps include ways to improve the matching of CEO needs with the experience and expertise of their coaches and mentors. Also included are methods to enhance the quality of contracting, especially to balance the needs of an individual CEO and the organisation for which they work.

Many charity CEOs engage in coaching and mentoring relationships confidentially, without informing or seeking input from their boards or senior teams. Greater transparency would often help integrate their coaching and mentoring agenda with their developmental needs, as perceived by their key colleagues and stakeholders.

Finally, advice is provided about managing the dialogue in coaching and mentoring conversations, ensuring accountability and commitment, and avoiding any risks of dependency.

Conscious practice by coaches and mentors

If coaches and mentors are to explain clearly and accurately the role that they play for charity CEOs, they must take care to become fully conscious of the principles and behaviours that underpin their practice⁶³. A crucial assumption that influences a coach or mentor's approach is the extent to which they and their client believe that the client has all the resources they need to address their challenges themselves. When either party thinks that the client needs the coach or mentor to bring professional experience or technical expertise of their own, to augment the client's thinking, the behaviours potentially involved in their dialogue shift from 'coaching' to include 'mentoring' and 'training'.

The relevance and value of these different approaches should be discussed during the initial contracting between the charity CEO and their coach or mentor, so that their expectations are aligned from the start. Once the work gets underway, the coach or mentor also needs to signal any changes in the types of behaviour they are using, so that their client remains clear and accepting of the role they are playing as their conversations unfold.

	Coaches/mentors	Charity CEOs
Matching	<ul style="list-style-type: none"> Be explicit in explaining personal areas of focus, expertise, style and philosophy Be prepared to provide trial sessions 	<ul style="list-style-type: none"> Be as clear as possible about objectives and the type of support needed Check out a variety of potential partners before choosing one to contract with
Contracting	<ul style="list-style-type: none"> Scope out and agree written objectives to provide an initial focus for the relationship Explore the strategic/relational/personal landscape to help identify key challenges Redefine objectives and ways of working together every 6-12 months as the relationship evolves Agree the focus and approach to every individual conversation at the start of each session 	<ul style="list-style-type: none"> Don't feel obliged to continue with a coach or mentor if their services are provided pro bono
Balancing personal & organisational needs	<ul style="list-style-type: none"> Consider engaging the chair in initial 3-way contracting discussions to incorporate their perspectives and involve them in the developmental process Seek 360 feedback from other stakeholders to ensure the CEO's impact on others is factored into coaching and mentoring discussions Avoid entering into relationships in which independence, confidentiality and trust are potentially undermined by other, conflicting interests Even if a relationship is kept private between a coach/mentor and a CEO, both sides should explore how they can best honour their responsibility to the CEO's organisation and their broader stakeholder network 	
Balancing directive & non-directive interventions	<ul style="list-style-type: none"> Establish explicitly the importance of the CEO retaining responsibility for both the coaching/mentoring agenda and for any resulting actions Signal carefully the intention behind conversational interventions to avoid them being misconstrued Notice the amount of time that each person speaks for, using the ratio of 80% CEO : 20% coach/mentor as a rule of thumb for good practice 	<ul style="list-style-type: none"> Avoid offloading the responsibility for doing the thinking on issues to the coach/mentor
Commitment & accountability	<ul style="list-style-type: none"> Ensure coaching/mentoring sessions are scheduled with the frequency and regularity necessary to create momentum and impact behind the agenda If sessions are often being postponed or cancelled, explore together whether this is a symptom of an underlying lack of relevance or commitment to the relationship Bring coaching and mentoring relationships to a close if they become too cosy or unchallenging 	

	Coaches/mentors	Charity CEOs
Dependency	<ul style="list-style-type: none"> Explore any risk of dependency in supervision Draw things to a close if concern exists over any unhealthy dynamics emerging in a relationship 	<ul style="list-style-type: none"> Think carefully about the role a coach/mentor is playing, taking care not to lose one's sense of agency

Table 5: A framework of guidance to help improve the productivity of charity CEO coaching and mentoring relationships

In conclusion

The study has found that the relatively isolated nature of a charity CEO's role, coupled with the emotive nature of the many challenges they face, makes coaching and mentoring of particular value to individuals in this position. Yet the purpose-driven nature of the organisations they lead can also make it difficult to justify spending money, and sometimes even just time, on personal support of this nature.

With this in mind, it seems important to conclude this report by encapsulating the case for a charity CEO to consider, and also to justify, working with an external coach or mentor. The benefits will potentially flow out from that CEO personally, to their teams, their organisations, and, ultimately, the causes they work so hard to support.

“Without question, I am a much better leader and chief exec having had coaching than I would have been without it” (CEO).

The case for a charity CEO to engage with an external coach or mentor

- Charity CEOs occupy a complex and potentially isolated role, caught between the team they lead and the board they report to.
- It is difficult for CEOs to discuss some of their most significant challenges freely with anyone in their usual support network, because these challenges are too emotive, complex or confidential.
- The independence of an external coach or mentor, combined with the relevance of their professional expertise and experience, provides someone with whom these issues can be explored in a safe reflective space.
- The conversations that take place can be an important source of emotional and developmental support to a charity CEO.
- The dialogue with a coach or mentor is also generative in that it helps CEOs build a different sense of themselves and their leadership challenges, thereby enabling them to discover enlightened new possibilities for action and change.
- Without an external coach or mentor, charity CEOs may be missing opportunities to strengthen their leadership impact relationally with their stakeholders and strategically for their organisations.

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Andy's career began with Unilever, where he worked in a variety of international brand marketing roles for 15 years. His last position was as the Vice-President leading its Marketing Academy, the group responsible for driving the development of marketing capabilities across Unilever's global organisation.

In 2000, he left to become Co-Founder and Joint Managing Partner of Brand Learning, a specialist consultancy which helped multinational companies build the capabilities required to drive customer-centred growth. Brand Learning grew to a team of 170 people with offices in London, New York and Singapore, before being acquired by Accenture in 2017.

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