CREATING THE INFRASTRUCTURE TO PRODUCE SUSTAINABLE CARER SUPPORT

Evidence from the ADVANCE Impact Study

This report draws on the findings of the 3 year study commissioned on the impact of the ADVANCE Programme that delivers mentoring for Network Partner Chief Executives for Carers Trust. It summarises the wealth of material gathered in order to inform Network Partners and the leadership of Carers Trust.

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New ways of thinking and doing in difficult times
Creating the infrastructure to produce sustainable carer support: evidence from the ADVANCE impact study

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Introduction

Aims of this report

At the end of 3 years of the ADVANCE Impact Study, this report aims to draw on the large body of work produced in order to:

- Help people **think resourcefully** about the key issues emerging from the work done in the ADVANCE programme, whereby senior volunteer mentors supported Network Partner Chief Executives (CEOs) in a structured but client-led one year engagement.
- Help CEOs **appreciate** the ground-breaking work they were part of and **help them keep learning and sharing**.
- Focus on learning relevant to all **Network Partners**
- Provide a **publication** for CEOs/the Carers Trust Network
- Provide **evidence** for ‘what next?’ for Carers Trust

About the impact study:

The study was planned and carried out as a research effort and therefore traditional evaluation tools were not used. Using an action research approach meant that outputs from the work were available throughout ADVANCE and not only at the end. The study therefore supported the programme’s development as well as tracking its impact. Given that a 3 year study was envisaged this was vitally important. What happened is summed up in Figure 1.

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**What research was done?**

- **5 cycles of research completed**
  - Included 3 regular participant questionnaires during their ADVANCE year
  - Working with 6 rounds of ADVANCE participants
  - Involved range of interviews and 5 locality in-depth reviews
  - Attending ADVANCE events (inductions & mentor development) to report back and gather further material
- **Group mentoring**
- **4 Learning notes produced and final reporting**

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*Figure 1 What research was done?*

The programme design team showed significant foresight in commissioning the study as a longitudinal process and so enabling ‘learning on the run’. This approach was especially valued by the mentors who used the key findings to develop their work.

The researchers were independent but also part of the programme’s partnership – they offered a critical eye to contribute and illuminate what was going on and collaborated with mentors, CEOs being mentored & their organisations, as well as with the design team: ‘researching with’ not ‘on’.
The large amount of material collected over the period of the study was stored and analysed using ‘Dedoose’ online software: this amounted to 170 pieces of material, involving 1350 coded excerpts and 124 questionnaire responses (62% overall response rate).

Codes were developed to analyse the material and a word cloud showing the application of the codes is shown in Figure 2.

What’s the key message of the report?
The report presents the study’s evidence on the impact of the ADVANCE programme, using an impact model that was built from the study findings – see figure 3. These findings showed 3 key arenas for impact, which developed:

1. self-confidence/leadership in the CEO being mentored
2. the Network Partner as an organisation
3. relations of CEO and the Network Partner with the external environment.

These are very broad but vital areas of impact. The development of the CEOs’ self-confidence and capacity for strategic thinking shone out from the earliest days of the research as a key benefit of the mentoring. The impact model shows how this connected to the other areas of organisational development and improving external relations. It became clear over time that central to all three of the areas of impact were the 3 issues most often prioritised by CEOs in working with their mentor: sustainability, governance and partnership/collaboration, as illustrated in figure 3. These issues provided the core of what the mentoring aimed to achieve in supporting the CEOs, the ultimate aim being to have a positive impact on carers and enable the services to support them. Thus these issues are critical to creating sustainable carer support by Network Partners in their localities.

The report develops these issues as follows:

Section 1 Return on investment. A summary of the core benefits of ADVANCE to the Network and to Carers Trust in relation to stakeholder investments.

Section 2 Top issues for Network Partners. A summary of Sustainability, Governance & Partnership/Collaboration showing what is meant by each, what priorities CEOs set, what action and progress the study tracked and what was learnt about each issue.

Section 3 Ending isolation, regaining control. A summary of core findings previously published.

Section 4 What’s special about the ADVANCE approach? A summary of what happened inside the ADVANCE programme that enabled the learning and progress.
Section 1 Return on investment: creating the infrastructure to produce sustainable carer support across the Network

The ADVANCE mentoring programme (2012-date) has had a measurable positive impact on the Carers Trust Network and on carer support. The overall and mutually reinforcing impacts of ADVANCE that the study identified are summed up in Figure 3. These areas of impact overlap and relate to the core priorities that Network Partners focused on in the mentoring work.

![ADVANCE Impact model](image)

The sum of the impacts, issues and questions in Figure 3 offers a view of what it takes in the current challenging context to create and support an infrastructure for sustainable carer support on the ground in the Network.

Elements of this picture of impact are explored in depth in the next section while this section reviews the core benefits of ADVANCE, both to the Network and the carers it supports, as well as to Carers Trust itself in relation to the investment made by stakeholders.

**Benefit 1: Focusing effort on critical issues to measurable effect**

The issues which Network Partners prioritised in their mentoring are those critical for their survival and growth in a turbulent environment where carer support is under budgetary pressure and the Network has been shrinking. Since 2012 the size of the Carers Trust network has changed. 49 Network Partners have merged to form 21 new organisations; 23 more Network Partner organisations have closed. Of those taking part in ADVANCE more than 97% are thriving and supporting Carers compared to 87% in the Network overall.

Participants’ mentoring priorities reflected sharp concerns with funding, capacity-building and new collaborations and partnership in order to hold onto existing support services as well as meeting unmet needs. These concerns may be summed up overall as: sustainability, governance and partnership/collaboration (see later sections for detail). Figure 4 shows the top priorities for mentoring across the ADVANCE programme. The programme enabled CEOs to identify and work with these priorities with little deviation from them reported over the year of mentoring.
Participants also reported doing things differently as a result of the mentoring – see Figure 5 - which produced ‘ripple effect’ benefits, as well as adding up to a huge improvement not only in their leadership but in their confidence in their leadership. What they did benefited not only the mentees themselves but also the carers they support, their managers, staff, volunteers and partners.

There is evidence also that carers benefited from services broadening, developing more creatively and being sustained in a context of cuts. Figure 6 overleaf outlines the range of benefits that rippled out to all stakeholder groups.

**Benefit 2: Creating critical mass for learning and change**

ADVANCE attracted high participation: **106 Chief Executives** (CEOs) from England and Wales have been mentored since the programme pilot in 2012. **Two thirds** of the Network’s current leadership in England and Wales are or have been supported by ADVANCE mentors. 2017 saw the start-up of ADVANCE in **Scotland** where 3 CEOs are also now participating with Scotland-based mentors. This level of participation has created momentum for development and learning as well as enabling...
common language, developed and shared across CEOs and often with their managers and staff – developing and sustaining the Network through communication.

Examples of impact nurtured by ADVANCE mentoring

The ADVANCE approach enabled learning: participants throughout the programme consistently reported the value they derived from an experienced outside eye or ‘critical friend’ offering them the space to re-work how they approached the pressures and problems of leading a local charity. This was the case both for highly experienced and newly appointed leaders. They reported significant impact on their understanding and skills in reflection, leadership and management (see Figure 7).

‘The best thing was to have a critical friend – to have someone else’s eye on your business, reviewing it in a friendly fashion. [...] The mentor was very good at offering me constructive criticism. Criticism was never given in a negative way; it always had a positive spin.’ CEO

Figure 7: What participant CEOs learnt from ADVANCE mentoring
Benefit 3: Leveraging considerable financial investment into the Network

At a time of huge pressure on budgets ADVANCE has, over the time it has run, leveraged an estimated £2.5 million pro bono support from 43 volunteer mentors and the Lead Mentor (calculation based on a notional £2,000 per day that reflects fees mentors were charging in the private sector in 2013/14.). This unstinting and generous contribution to the programme represents over 80% of the programme cost and equates to some £24,000 worth of free support delivered to each Network CEO for a cost to Carers Trust of £5,000 per head. Carers Trust has been able to meet these costs of £500k through grants from Pears Foundation, Esmee Fairbairn Foundation and other restricted funds. Thus Carers Trust and its Network has benefited by a total of £3 million.

Benefit 4: Building a pool of resources and experience in Carers Trust for the future

The success of ADVANCE mentoring has created a trusted brand among Network Partners that could be further developed within Carers Trust’s network support activities. ADVANCE alumni rate this programme as one of the most highly valued services provided for them by Carers Trust. Mentors have been themselves developing ideas about how to create an extended impact in this way.

The group of volunteer mentors represents an extremely high calibre resource for Carers Trust for the future; experienced and committed people willing to give time to the cause of Carer support, not only through mentoring but as organisation consultants, human resource and management professionals. Already they have provided support to the recent strategic workstreams in the ‘Make Carers Count’ initiative, while 6 ADVANCE mentors and 1 of the impact researchers have now joined Network Partners as trustees. Increasingly, ADVANCE mentors are being sought out by groups of Network Partners seeking help in developing local partnerships to withstand local commissioning trends and pressures.

Benefit 5: Value of sustained impact research as part of ADVANCE programme

The 3 year impact study was a vital part of the programme and the commissioning of it as ‘action research’ rather than more usual ‘evaluation’ activity produced important extra benefits:

- Continuous reporting of impacts and other learning about the programme resulted in action that has helped inform decisions taken along the way as well as assisted the practice of mentors in particular.
- The card set of key findings produced in Autumn 2015 has been informative for the Network and Carers Trust staff
- It has provided the potential for the Carers Trust, should it wish, to publicise the ADVANCE work and its impact. This could add an important new dimension and evidence to the current state of knowledge about mentoring. Mentoring is generally viewed as something for less experienced people, but challenging that perception, the results here for highly experienced leaders are notable. Equally, the flexible and yet structured process adopted demonstrates it is possible to achieve both, something debated in the existing literature. Further, there is a dearth of substantial research studies on mentoring and its impact, so this 3 year action research study would be seen in the wider world as extremely helpful. It also demonstrates a very different way of using volunteers than is usual and this is an exemplar for other organisations.

In short, £3 million of investment was created benefiting over 100 Network Partners across England and Wales, and now in Scotland. The support this investment generated focused Network Partners on critical priorities to achieve sustainable carer support in their localities. Participant CEOs’ learning has positively affected carers, staff, trustees and local partners, creating a new kind of learning culture across the Network that should persist, given the pool of resources and experience amassed via ADVANCE.
2 Top issues for Network Partners

The three top issues are examined here in more depth, giving examples of CEOs’ learning around these issues through their mentoring. It also provides evidence of building their capacity to learn – something that is critical for survival. Each section covers what the particular issue means in this study, what priorities were set by CEOs, what actions and progress the study tracked and what was learnt about the issue from ADVANCE. Quotations are from participant CEOs unless otherwise stated.

- Sustainability
- Governance
- Partnership/Collaboration

Sustainability

‘We want to grow and know where we want to get, but it’s the capacity to grow...’

‘The pressure on small charities with limited capacity in a very volatile climate means that it is critical I remain clear headed and confident that the steps I am taking are the right ones. The pressure and responsibility to meet all the competing demands is exceptional.’

What’s meant by sustainability?

Network Partners yearned for sustainability like an oasis in the desert; but too often the desert seemed to offer up a mirage rather than the wished-for well. The reason for this was often rooted in the brutal fact that stability and balance are extremely difficult to achieve when the operating environment is highly volatile and also largely unpredictable. The challenge facing CEOs in these circumstances has been likened to re-designing an aeroplane at the same time as flying it in real time. (see http://www.internationalfuturesforum.com/three-horizons)

The meaning of ‘sustainability’ varied widely across the Network Partners who participated in the study. The question, ‘Who and what needs to be sustainable?’, was answered in very different ways depending on the circumstances of individual organisations and CEOs. For some, mainly as a result of acute business pressures, the timescale for thinking and action was very short-term; and in this situation sustainability pretty much equalled the immediate survival of the organisation. Other Network Partners took the opportunity of facing an uncertain future to define what they meant by sustainability through searching review of the underpinning values and purpose of their organisation, along with its governance. Strategic options could then be developed to fit the key findings of the review.

The focus of sustainability for participants in ADVANCE moved across the following dimensions:
• Sustainability of self (e.g. how could individual CEO withstand the pressures on them without falling ill?)
• Sustainability of the individual Network Partner (e.g. what are the future options for this organisation in this environment?)
• Sustainability of services to carers locally (e.g. how can support continue to be made available to carers even if the individual organisation ceases to exist?)
• Sustainability of support/development for CEOs (e.g. what form of support might follow ADVANCE?)
• Sustainability of Carers Trust and its Network.

What priorities were set by CEOs?
Participants in ADVANCE consistently highlighted the following as being important to them in working towards sustainability. These priorities emerged at the start of the mentoring process and remained key drivers throughout.

• Get a grip on the finances – including identifying risks, driving down costs and diversifying income streams
• Improve ability to ‘scan the horizon’ – in order to identify both threats from competition and opportunities for collaborative working
• Increase confidence in ability to influence strategic direction – and thus help achieve sustainability
• Expand available resources and develop organisational capacity – including tackling chronic challenges relating to workforce.

What actions and progress did the study track?
Work on any of these priorities tended also to require attention to one or more of the others. And at the same time the CEOs were heavily involved in operational decision-making and action. One CEO commented, ‘I suppose it’s not that common for CEOs to be chief toilet roll changer as well as everything else? But when you’re as small an outfit as we are, you can’t get away from the basics for very long.’ Despite this – or perhaps because of it – CEOs put great value on the reflective time that lay at the heart of the ADVANCE mentoring relationship. And the complex interplay among long- and short-term thought, reflection, discussion and action resulted in the following steps being taken to ground the priorities in the life of the business.

Setting clear framework for future planning
In many cases, mentors engaged with the Board as well as the CEO. Engagement of this kind was particularly helpful when long-term planning was being discussed. As one mentor put it, ‘Bring in anyone senior, and they will take a strategic view, you can’t help yourself.’

Mentors often used searching questions to invite Board and CEO to explore some of the issues underlying discussions about sustainability. For example, what was the core purpose of the organisation? Was it to fulfil contracts in a way that most readily met the needs of commissioners? Or was there a charitable purpose involved? If so, what kind of change might be needed so that intentions and action might be better matched? The vignette on page 10 illustrates how a discussion of this kind led to a turnaround in strategic focus.

Given the intensity of pressures on Network Partners, it was not surprising that both Board and senior management team often reported themselves as swamped, feeling that they had to take responsibility for far more than they could realistically deliver. Work with ADVANCE mentors helped them set clear priorities from a mass of possible developments.
Mentors also offered a sounding board for creative thinking about the future.

‘We’d had a big restructuring with the aim of making us sustainable. I wanted to branch out and do different things. But what would these be? We’d always stuck to the respite core service, never offered domiciliary care. Was this still the correct decision? What other avenues might there be? I wanted someone that I could bounce ideas off. Someone who wasn’t a trustee, and wasn’t just concerned with keeping us going. Would my ideas run – were they viable? Or was I aspiring to things that we just couldn’t achieve? What was realistic and possible for us?’

Reducing costs and attracting additional resources

In the words of a member of the ADVANCE design team, a key purpose of the mentoring programme was to ‘transform a traditional charity into a more modern corporate and business-like organisation that looks to the future and is fit for purpose.’ So, guided by the core purposes of their organisations, CEO participants in ADVANCE committed themselves to be proactive leaders working towards financial sustainability involving diverse income streams.

The actions taken by Network Partners to reduce expenditure ranged from systematic day-to-day efficiencies, to sharing accommodation and back office functions, to full-scale merger.

Actions to attract additional resources included:

- A decision to employ a funding officer for a 26 week trial period to add to capacity to get non-statutory funds and to link to more volunteers. This new post was paid for from reserves that had been significantly topped up following an earlier deficit.
- Application for a lottery grant to improve sustainability
- Active steps to attract funds, volunteers and gifts in kind.

Recalibrating relationships with commissioners

Many Network Partners, particularly those offering regulated services, had found their changing relationships with commissioners something of a switchback ride. In some cases, they were still reeling from what they saw as a sudden transition from being regarded as a knowledgeable voluntary sector partner, committed to making high quality services available to carers, to being treated as, in the words of one CEO, ‘any other provider who might do the job for the lowest possible price.’

Working with their mentors, CEOs reviewed these relationships and the implications of austerity-induced changes. They planned how to take action to secure their position against increased competition from other local and national voluntary organisations, especially for statutory funding. They discussed too when collaboration might be preferable – and more profitable – than competition. They also explored ways of demonstrating why they should be funded in preference to others.

One CEO gave a succinct summary of the task ahead:

‘Agreed a strategy for negotiating with the commissioner, which addressed short-term capacity issues, medium-term remodelling of the service and long-term re-tendering preparation.’

Other important relationships also came under review during the ADVANCE programme – in particular, relationships with trustees (see page 12) and with other voluntary sector organisations offering similar or complementary services (see page 16).
Learning about sustainability from ADVANCE

- Whatever their situation, CEOs need to develop skills in understanding finance, assessing risk, and working with trustees to plan appropriate strategies and action

- The more senior people understand the environment in which they are operating, the more likely they are to be able to adapt and succeed in their goals

- Successful CEOs fully acknowledge the importance of engaging at the strategic as well as operational level – and often look for support in ‘standing back and reflecting on where we are and where we want to get to’

- The drive and determination needed to achieve sustainability is intrinsically linked with the CEO’s energy, motivation and belief in themselves.

Vignette – Dropping a stone in the pool

Network Partner A had a long-standing commitment to offering support to people with care needs as well as to carers themselves; they saw the two as being inextricably linked. Over many years they had built up a strong reputation locally for delivering high quality home care services. In recent years, they found themselves under pressure from their local authority commissioners to offer 15-minute visits. This pressure was resisted, since both senior management and the Board saw 15-minute visits as a step too far towards task-oriented rather than person-oriented care. The CEO summed up this view as, ‘15-minute visits allow no dignity.’

However, other pressures were making themselves felt too. In particular, the reduced rates being offered by commissioners carried a threat for the high quality training and induction of staff that supported the home care services offered by Organisation A. As a service provider, the organisation was acutely conscious that competition was never far away. Private sector firms were happy to enter the market offering whatever length of visit the commissioners wanted, and with no commitment to training staff beyond a bare minimum standard.

An ADVANCE mentor entered the picture at this point. The CEO of Organisation A takes up the story.

‘ADVANCE actually had a big impact on how we think about what we are for and what we do. The mentor, X, threw down a challenge to us that really turned round how we do things. We’d lost our way a bit. We were very focused on responding to the need for domiciliary care – that was where the funding was. The charitable side was on a bit of a backburner. From the sessions we had with X, it all turned around and over the last few years the charitable side has come to the fore. X came to a Board meeting, sat there, listened. Then he asked, ‘What makes you a charity? From what I’m hearing, you’re not a charity, you’re just a business.’ We were taken aback! I said, ’We don’t make a profit!’ He asked, ‘But what are you giving back?’ We said, ‘Well, we offer a high quality service.’ He said, ‘Yeah, and so do a good many private providers out there.’ This exchange really made us think.’

Since that time, we’ve taken steps to widen our sources of income so that we can make a serious contribution on the charitable side. For example, we own the whole building here, we have a mortgage on it. We rent out rooms, and a percentage of what we earn from that we put into charitable activities – for instance, we offer an end-of-caring service for when the cared-for person dies or goes into institutional care and the carer is left high and dry. We also got 5-year funding from the Big Lottery for the post of befriending coordinator for carers.’
Governance

‘I need to strengthen the Board and recruit new Trustees to share the responsibility of the organisation with them. At the moment I feel the responsibility of our situation is not shared with Trustees because I am concerned that Trustees will leave the organisation if I do not continue to take the responsibility away from them and stay very strong as a leader. I know it might be more of a strength to take the risk and share, but I have strong and good instincts and not all Trustees are tenacious when the going gets tough. Input from my mentor may help me with this area, which is critical for a good organisation. There is too much dependence on me and that is an issue for sustainability too.’

The quotation above sums up the tensions involved for a CEO wanting to improve the governance of the organisation – and its link to sustainability. Despite their insight into the importance of governance, taking action is very difficult alone. This is where mentors have really helped CEOs not only take action on governance issues but also to learn how to do this and why it matters. Some of the issues discussed here may look obvious when reading them but crucially not for the CEO in the middle of running a business and trying to juggle these complexities at the same time.

‘For me the key is around working with boards to improve governance. Without a strong supportive and strategic board, organisations will struggle in the long term.’ (mentor)

What’s meant by governance?

When it comes to governance, who leads and who follows? The theory about respective roles of trustees and CEO is relatively clear; but the practice across Network Partners distinctly less so. Some CEOs felt intimidated by their Board and duty bound to follow every expressed wish. Some Boards believed that the CEO was best positioned to make decisions and so should be backed up on every occasion. Yet other CEOs would have dearly loved a degree of challenge and new thinking from their trustees but despaired of ever getting it. And other Boards pretty much discounted the advice of the CEO as coming from the hired help.

Governance did not start as a key issue but has steadily come to the fore over the 3 years of ADVANCE and is now one of the top three. It is no accident that it is heavily connected to keeping an organisation sustainable and matters a great deal when an organisation is going into partnership or collaboration – the other top two issues. Governance takes in how the Board of Trustees works to ensure the charity operates safely and legally and to enable sound finances and clear direction. It includes how the board works best with the CEO, senior staff and partners/collaborators.

What priorities were set by CEOs?

Many CEOs wanted to work across complex issues of governance with the aim of making quite substantial changes. What people most identified as (often linked) priorities regarding governance at the start of and during their mentoring were:

- **Effectiveness** of the board – especially in leadership, strategic direction and in both supporting and challenging CEOs
- **Strengthening** the board via recruitment and succession planning, improving their capability through development
- **Supporting** the board to discharge its duties and provide stable, proactive leadership capacity
Redefining roles, responsibilities & structures, especially to work better with individual trustees and maximise their input of skills, experience and time

Ensuring a focus on Carers was kept to the fore

What actions and progress did the study track?
How did they get on? The most important achievements were:

Recalibrating relationships with the Board

CEOs needed the agreement of their Board to embark on the ADVANCE programme in the first place. Once enrolled in the programme, the CEO was in the position of guiding the mentor on who, if anyone, they might usefully engage with, including the Board. Some CEOs invited their mentor to engage with their Board; others did not. Where the mentor was able to engage with both CEO and Board, significant benefits seemed to follow, including clearer understanding of each other’s roles and shared language.

This included having focused working groups (including jointly with other boards where collaboration was important), making more use of briefing papers with clear options for decision and ensuring minutes had action points for named trustees. Importantly too it was often about the CEO taking up a leadership role and challenging and informing the board in newly assertive ways. The CEO started explicitly discussing proposed changes with trustees as well as with staff

‘We received guidance on preparing a briefing/discussion paper and have used this method to negotiate with both potential partners and our Board.’

‘We now have a more proactive board of trustees and also [my mentor] has taught me to always let them know of any risks which is now a standing item on the agenda for all board meetings.’

‘My mentor has encouraged me to be more determined and demonstrate greater leadership skills when working with the board, he has given me the courage to be more assertive and present them with less options so they have to make decisions instead of endless discussions.’

More formal processes

This ranged from a governance audit producing an action plan to strengthening trustee codes of conduct. It included Boards being clearer on expectations of trustees and having tighter procedures in place for governance. Management committees became boards of trustees.

‘We have now introduced new procedures and codes of conduct and job descriptions for trustees on the board.’

‘My mentor has worked very closely with my Chair and I to “tighten up” procedures and commitment to take an active role as a trustee. This was a particularly difficult piece of work that benefited from having an “external” person lead on. Our Chair bought into the expertise that the mentor could bring to our organisation.’

Building CEO confidence on governance

It was clear CEOs often needed to build their confidence to raise tricky issues with chairs and boards and gain their support. The mentoring enabled this.
‘The on-going issues had knocked my confidence in working with a Board of Trustees and had caused me to doubt my own abilities. Following the discussions with my Mentor, I regained that confidence when I realised that I was absolutely correct in trying to bring about the necessary changes.’

Actions were reviewed by my own board post them being taken and were fully supported which has increased my confidence and knowledge base.

‘The organisation has benefited from my ability to seek a confidential, independent, non-judgemental and professional perspective on challenging issues. This has helped me to work through problems and be more solution focused when meeting with my Chair and trustees. My mentor has been a sounding board and has allowed me to let off steam about sensitive issues. With her support I found that I was able to deal with some very complex issues confidently.’

One CEO described how ADVANCE had helped them at a difficult juncture with the Board.

‘A priority around governance erupted and took precedence over other matters. This whole episode was a hugely difficult and extremely challenging experience for me as a new chief executive. My mentor was able to provide incredible effective support for me and the organisation, top of which was in fact that I had to put the organisation first and overcome my dislike of conflict. I am now in the process of ‘building the board I deserve’ and am absolutely signed up to the importance of the Board in the success and survival of an organisation such as ours.’

Working more closely/differently with the chair was particularly key in terms of mutual support and challenge and building solid working links. This is a difficult tension to manage for CEOs and it is striking that both male and female CEOs are quoted above, talking about issues of their confidence with boards, whereas all comments about working better with the chair came from women CEOs, for example:

‘Without the support and knowledge of my mentor I would not have felt confident to approach the piece of work with my Chair in relation to our Trustee Board. We are now working on writing new trustee job descriptions and have taken time out to plan.’

‘I have been more appropriately assertive in communicating with my Chair and Deputy.’

Better/clearer strategic direction

For a number of CEOs working on governance meant getting a clear set of values along with a strategy or business plan in place which trustees would support and contribute to.

‘We have fully discussed our organisational strategy for the next three years and produced clear actions and targets and sub committees who will have a key focus area.’

‘I learned a lot by observing how my mentor facilitated the strategy day in a way to encourage all trustees to engage in the way they want the organisation to develop which I feel has given me more confidence in the area of strategic direction.’

Learning about governance from ADVANCE

✓ Developing leadership and leadership capacity involves both CEO and trustees. Many commented on the need to involve trustees and or chairs in the mentoring process and a
large number of mentors did meet trustees and work directly with them as part of supporting the CEO.

‘Work with my mentor changed how I viewed trustees – being blunt with them wasn’t working. I was in a bit of a vicious cycle. I got frustrated with lack of support from the board, and that frustration showed itself in ways that alienated the board further. My trustees didn’t really know what their role was. My mentor ran a training session with them, and they are now willing to take on responsibilities that that are new to them’

‘Some boards are quite passive – is the term ‘nodding dogs’ too cruel? But others are powerful, and this can be difficult for a CEO, in the sense that they can feel restricted by the fixed views of the board. Mentors can help this situation by working with trustees as well as with the CEO’ (Mentor)

✓ Being proactive on governance is a key component of the CEO role

‘[I recognise] the push to manage my Trustee Board better in future, and to be more tuned in to what they want from the experience’

‘Establishing relationship with the Board is key – a learning from previous mentoring relationships where this was not prioritised’

✓ Improving governance is complex, takes time and requires the right approach and knowledge

‘[Trustees] are deeply rooted in their communities, committed to the work – but parochial in view and not critical in the way they look at things. Many of these people are looking backwards – but their organisations are looking forward to a very difficult future. So I’ve been trying to get the board up on the deck of the ship, looking ahead. Then trying to translate that into action for engine, rudders, etc.’ (Mentor)
Partnership/Collaboration

The process has not been all plain sailing – as partners we are very different and some of our histories, as well as current changes, have certainly complicated the working together approach. I would say that the process has exposed these issues to the harsh light of day – at the very least we know more about the motivations, priorities and direction of our Network Partners than we did before. It’s not easy working together when the survival of some partners is threatened, whether that be by internal or external pressures, and it’s usually both. In a nutshell, we have been forced to face up to the differences and tensions as well as the potential. On the other hand, cracks will show up later if you don’t open up and lay your cards on the table when trying to work together.

What’s meant by partnership/collaboration?

In the course of the ADVANCE programme, CEOs discovered what many have discovered before them – that, at its best, working with other organisations can deliver great rewards; but, if things don’t pan out, a long trail of damage may be laid. Leading researchers in partnership working in the voluntary sector offer as the first of their top tips for collaborating: ‘Don’t do it unless you have to!’

1 – advice that several participants in ADVANCE events received with a rueful smile.

For the participants in ADVANCE, ‘working together’ with other organisations ranged from ad hoc arrangements to collaborate on tenders for contracts to joint working leading up to full merger. These situations often had in common the fact that neither CEO nor trustees were familiar with the processes involved. Typically, ADVANCE mentors had significant experience of collaboration, and were happy to put this at the service of the Network Partner.

One of the first challenges for Network Partners was to work out which organisations counted as ‘internal’ and which ‘external’, and the implications of that categorisation for relationships going forward. In many cases, CEOs were taken aback to find that shared membership of the Carers Trust Network did not preclude behaviour that was seen as competitive rather than collaborative. Internal, it turned out, did not necessarily mean friendly; and external did not necessarily mean hostile. In some cases, CEOs found greater support and potential in other voluntary organisations in their locality with which they shared a long-standing commitment to the welfare of carers and those being cared for.

Whatever situation they found themselves in when looking to future relationships with others, CEOs could be observed trying to find points of balance within the following polarities:

- Openness to partnership vs working in a competitive environment
- Internal focus vs external focus
- Combating limitations vs building on strengths
- Personal development vs organisational development
- Charity values vs commercial operations.

What priorities were set by CEOs?
Many CEOs saw working with other organisations as presenting the biggest challenge of all. This was unfamiliar territory for most Network Partners, and, in some cases, CEOs feared potential exposure of significant vulnerabilities. Nearly all were aware that without trust, there could be no meaningful relationships; but trust needed both time and fertile soil in which to grow. In what were often pressing and highly charged circumstances, CEOs identified the following priorities as of overriding importance.

- **Learn more about what is involved in identifying potentially successful relationships/collaborations, setting them up, and nurturing them** – in the words of one CEO, ‘I am trying hard to look outwards as well as consider our survival as it will be part of the answer’
- **Develop/refine skills and confidence in building trust and influencing people** – and thus advocate more effectively for self, staff, organisation and carers
- **Develop/expand services locally through partnership working** – while making sure that internal structures and ways of working support new initiatives.

What actions and progress did the study track?
Central to progress in joint working was a renewed focus on the importance of building and managing relationships.

*Increased confidence and skills in working jointly at all levels*
It became clear that solid partnership working was being supported by ADVANCE mentoring. One CEO commented:

‘We now approach dialogue with potential partners in a tactical way; our mentor has supported us to consider our approach and modify throughout negotiations. We received guidance on preparing a briefing/discussion paper and have used this method to negotiate with both potential partners and our Board.’

Another CEO who shared a mentor with a nearby organisation credited ADVANCE with significant influence on the strategic direction of the two organisations:

‘[The programme] has greatly increased the ability to work in partnership and develop and grow and has influenced the strategic direction of travel of the two organisations both at Trustee and Chief Exec level. This has led to clear opportunities and some growth as well as cementing approaches to potentially working in other areas.’

In the most effective instances of joint working, as the vignette on page 18 illustrates, the partners fully recognised the need both to work externally and not to lose sight of the internal issues. The result was that there were clear gains for carers and staff as well as other stakeholders.

*Once you start to think differently...*
A mentor summed up what they believed to be the ADVANCE contribution to helping CEOs think differently:

‘Facilitating the exchange of experience and expertise between the two partners; providing support and strategies around staff management; providing protected space for them to think more strategically and long term, as opposed to the task focussed work of the every day.’
CEOs made it clear just how important this contribution was to the development of both themselves and their organisations.

‘As two organisations working with a mentor, we were helped to establish strategic direction for both organisations – handbrake off. We were also encouraged to use practical ideas – like creating workstreams – that would make a real difference to how things were thought about, done and experienced. Basically, we were helped to think differently about everything – especially about what might be possible. So we’ve now got a regional governance group, and we’ve bid for and won more work in partnership. And we’re getting lots of exciting things going – like using a legacy mutually to do new things for carers.’

Particularly helpful, it seemed, was the invitation from mentors to reflect on the interface between personal and organisational drivers in relation both to the CEOs themselves and partner (or potential partner) organisations. The following feedback from CEOs shows the range of responses by CEOs to this invitation to think differently.

‘I have started to ask the question around what I need compared to what the Network needs and to see if I can bring the two together. It has given me the confidence to identify what I am willing to do and not willing to do with regards this project and also to know what is acceptable behaviour and what’s not. I have pushed back on a couple of things with some Network Partners and stood my ground which I may not have done before. Those actions were reviewed by my own Board post them being taken and were fully supported which has increased my confidence and knowledge base.’

‘As a CEO it is all too easy to be pulled into operational issues. I now prioritise and manage my time more effectively and am taking more time out for meetings and networking with other CEOs and organisations.’

‘Influence - refined my skills in this area, become more thoughtful and aware of the way I present an argument in writing and in person as I seek to influence those with power. This in turn enables me to advocate for self, staff, organisation and carers in a confident way, willing to explore different avenues and know when it may be better to back off. In essence I’m learning very fast the importance of clear headspace - take that strategic leap and gain insight into cultures, people and users, starting with self.’

**Developing and expanding services**

Do thinking and reflection sit in opposition to constructive action? The impact study suggests that in relation to effective partnership working, the reverse is true. Without CEO time spent focusing on core purpose and potential strategies for furthering that purpose, carers would be unlikely, for example, to have seen the following kind of benefits.

‘We’re proud of where we are getting to in service development. We’ve got classes going on dementia via [local adult education institution] and we’re doing training and partnership working with the hospice on end of life care, to support our hospice at home work.’

‘The centre convenes a meeting drawing in 18 other voluntary sector organisations concerned with carers e.g. Alzheimer’s, Parkinson’s etc. The meeting acts as a forum and links organisations together and to the council whose staff find it a helpful place to brief the sector e.g. on direct payments, disability grants. It enables collaboration on Carers Week and other activities.’
Learning from ADVANCE about partnership/collaboration

- Clear thinking, and commitment to identifying common purpose, are key to successful partnership working
- Equally important are recognition of, and respect for, different perspectives, along with enthusiasm for building relationships
- Collaborative ways of working underpin successful co-production, and are often useful in initiatives both inside and outside the organisation.

Vignette – Supporting carers through partnership working

Two Network Partners created a formal partnership to deliver a major carer support contract commissioned by their local council. Before joining the ADVANCE programme, the partnership recognised it needed a more strategic approach and to develop itself and its joint board. ‘We were doing difficult things and it was getting more complex. It was a new game for all of us including for the CEOs’, said a trustee. The mentor worked with both Chief Executives to begin to tackle this substantial agenda, and subsequently commented: ‘The mentoring is a focus, it made them talk one to one regularly and compare notes in a way they may not have done alone, it was a trigger or maybe more, a catalyst.’

Much was achieved over the year to embed the partnership way of working. The work together included:

| Making things better for carers through simpler and broader support: ‘Before [the partnership] carers did not have such good information and we have raised the profile of carers services, things are now in place, embedded.’ (trustee) |
| Taking staff with them, enhancing security and staff development, and tackling ‘the ‘grass is greener’ effect’ |
| Strategic work with their managers: clearer and shared organisational development and priorities |
| Developing their organisations to be more sustainable with streamlined back office support. ‘[The mentor] has helped us be better partners and work with others differently.’ (Trustee) |
| Strengthening governance: more clarity and more confidence for trustees. ‘The [partnership] board has been much better over the last year or so. We get a jointly written report from the CEOs which is helpful. There is a standard agenda and we cover governance items. The issue is keeping the boards of the two charities up-to-date – they need these reports.’ (Trustee) |
3 Ending isolation, regaining control: findings previously published

In autumn 2015, 5 info cards were published, summing up the findings of the first half of the study in a visual way. This section offers a short overview of their content.

1 Having a mentor is about success not failure

Early on it was clear that participants could easily identify a ‘virtuous circle’ created by taking part in the ADVANCE mentoring programme, which would enable them to get better at what they were doing.

Later, the ‘vicious circle’ that ADVANCE helped them to escape from was also uncovered, and many felt they were always in danger of slipping back into this difficult place, even though they may not have experienced all of its elements.

Mentors also found these ideas helpful in supporting mentees to sustain things they were changing or working on in their charities.

2 Mentoring supports personal and business development

Mentoring in ADVANCE is about both the individual and the organisation rather than one or the other. The ‘mobius loop’ diagram helped mentors especially to think of their mentoring, the mentoring sessions, and indeed specific questions or comments made, as needing to move constantly between both the individual CEO’s development and that of their organisation.
Mentoring helps you get better at juggling

CEOs were juggling many tensions and often pulled to one side or the other of these difficult situations. Mentoring helped them identify that they could only juggle effectively by paying attention to both horns of the dilemma. Without this approach they were in danger of sinking into the ‘danger zone’ in the illustration of only doing one or the other. Advance mentors helped CEOs approach these tensions on a continuous basis rather than looking for one-off solutions and enabled them to respond constructively to them, so staying on the top line and avoiding the danger zone.

Mentoring helps you ask better questions

It came as a surprise to many CEOs that the capacity to ask better questions and to encourage your staff to ask them also could be so helpful. Many had been trading in quick answers and the perception that providing these marks out a good leader.

But the ever-changing external environment of Network Partners means being able to formulate and ask searching questions matters more. Mentors were able to support this with their insight and outsider’s view.
Mentoring helps you play to your strengths

The Advance programme was in many ways taking an ‘asset based community development’ approach to help Network Partners adapt to radically different demands and scenarios – in these disruptive times playing to your strengths is a critical skill.

Asset or strengths based approaches are becoming widespread in public services. These approaches stem from pioneering work in Chicago over several decades known as ABCD: asset based community development.

The idea is to hone and build on existing strengths in a community rather than try to bolster deficiencies. ADVANCE was building on strengths both for individual CEOs, for Network Partners, for groups of Network Partners and for the Network as a whole. Mentoring was achieving this through creating relationships and connecting people, by listening to and caring about people’s concerns and by asking for ideas rather than giving solutions. This was then replicated by CEOs with their staff and partners.

An interactive presentation using the info cards is available [here](#)
4 What’s special about the ADVANCE approach?

Constant questioning lies at the heart of any action research inquiry. Typically, questions produce some answers – and also many further questions. One of the most challenging questions confronting the ADVANCE researchers emerged as:

How is it that a programme focusing on one-to-one relationships, conducted on a basis of confidentiality, can bring about far-reaching benefits of the kind outlined in Section 1?

A useful starting point here is the transformation of the ‘vicious circle’ confronting CEOs into a ‘virtuous circle’ following participation in the ADVANCE programme (see page 20). What underlies the different interventions that, taken together, have helped to produce more effective leaders and more sustainable organisations?

This section:

- looks at the infrastructure of ADVANCE as a learning programme, including core design decisions and processes
- explores which elements and initiatives worked well, which less so
- discusses the possible development of a ‘recipe’ for good mentoring.

The infrastructure of a learning programme

Certain key decisions were made at the inception of the 2013 pilot programme for ADVANCE. Two of these stand out as having particularly enduring value. First, all mentors should be of a high calibre – in short, they would be senior leaders with a significant track record. Second, the mentoring relationship should be developed in a context of strict, and clearly defined, confidentiality, where the sole aim was to support and promote a process of learning.

At the end of the successful pilot programme, a Design Team was assembled, with members drawn from Network Partners, mentors, and Carers Trust, to co-produce the rolled-out version of the programme with participants and other key stakeholders. Quality assurance was built into the governance of ADVANCE from the start. Confirming as abiding principles the importance of confidentiality and the calibre of mentor, the Design Team set up processes for recruitment, matching mentor and mentee, and induction that would deliver these outcomes.

Another early key decision was to invite a Lead Mentor, of wide experience within and beyond the voluntary sector, to join the Design Team. Her remit was to support individual mentors in their work, and to ensure that all participants in ADVANCE had regular opportunities to crystallise and share their on-going learning. Accordingly, it was agreed to hold induction days where mentors and mentees could meet up and work together. Mentors were also asked to commit to attending their own induction day and regular development days where they could explore, and share with their peers, their experience of mentoring on ADVANCE, with the aim of further developing their practice. The Lead Mentor regularly held one-to-one conversations to support mentors, and made it clear too that she was happy to act as a sounding board in the event of significant difficulties or disagreements between individual mentors and mentees.

A further substantial commitment to ADVANCE as a learning programme was the early decision by the Design Team to commission from independent researchers a longitudinal impact study of ADVANCE that would assess, on an on-going basis, how effectively the programme was meeting its goals and that could indicate fruitful areas for further development both during and after the programme (see earlier details).
What worked well, what less so?

**Good – everyone and everything that helped build trust**

Without trust between mentor and mentee, nothing of any significance could be achieved. Within ADVANCE, factors that promoted the development of trust included: CEO respect for the calibre of the mentor; CEO confidence in the ability of the mentor and ADVANCE team to maintain confidentiality; CEO appreciation of the robust processes and structures underpinning the mentoring programme, such as recruitment, matching mentor and mentee, mentor development and supervision by the Lead Mentor.

Reciprocity and sharing are key to the formation of trust – and were encouraged by the design and experience of ADVANCE. Throughout the programme, mentors and mentees expressed deep appreciation of the contribution made by the Lead Mentor, in terms both of personal one-to-one support and the facilitation of learning events where the emphasis was on sharing with peers. One mentor commented:

‘To work with senior people giving their time voluntarily, and with no vested interest – quite a challenge! But she motivates and encourages in such a way that you get as much as you give.’

Coming together to share, discuss – and, often, laugh – was important to many CEOs and also mentors. The isolation felt by CEOs of Network Partners was a constant theme of the impact study; so their appreciation of situations where they could ‘be themselves’ was not unexpected. Perhaps less pronounced, but no less real, was the pleasure that mentors took in each other’s company. Exceptionally high achievers, it seems, can very much appreciate the opportunity to escape competitiveness and work together towards an agreed good.

**Good – balance between formal and informal**

The review of the research literature on mentoring carried out during the impact study highlighted the conclusion that it is important to balance formal and informal aspects of mentoring, to get the best of both: the rapport and relationship of traditional, informal mentoring and the structure and support provided by a more formal scheme. This echoed the praise of ADVANCE by participants as offering, ‘a clear structure but is also flexible to respond to mentee needs’. Mentors and mentees found many different ways in which to express and meet their individual needs – including, in at least one case, an agreement to conduct mentoring sessions while taking a walk round the park.

**Good – going for the ‘ripple effect’**

The mutually beneficial and reciprocal relationships associated with effective mentoring encourage participants to pass along learning experiences and create learning opportunities for others. Participation in ADVANCE stimulated many CEOs of Network Partners into taking a new approach to staff management and executive team development. The key experiences they wished to share are summed up well by the Lead Mentor:

‘ADVANCE is an experience of building high trust relationships and partnerships, with a clear sense of purpose and loose intention, with a curiosity and open mind-set to new insights and challenges. ADVANCE is built on the foundations of thinking well together, building trust, and engaging with transitions.’

**Good – the invitation to co-design**

ADVANCE did not start from a position of ‘having all the answers’. Indeed, the starting position was more like, ‘We have an awful lot of questions, and we’re sure that you have many of the answers.'
Let’s talk. The programme was co-designed at all levels, from Design Team to individual mentoring relationships. And its identity as an emergent learning programme was warmly embraced by most participants who saw it as genuinely something of their own.

Less good – moving into group mentoring
There were good reasons for looking to extend the ADVANCE programme beyond one-to-one mentoring. Competitive pressures, along with changes in regional power structures, meant that new partnerships and collaborations were increasingly being developed within and outside the Network; while little resource was available to Carers Trust to support the development of these new bodies. Also, in early rounds of ADVANCE, pairs or trios of participants had applied together and were mentored jointly, so that extending mentoring to groups seemed a feasible move. Experienced ADVANCE mentors, working in twos, were assigned to several new collaborations to help them constructively draw on the strengths of the individual members. Progress was, and continues to be, halting. ‘There’s always someone missing’, one mentor commented of meetings; while another added, ‘They are in a vicious circle of it [the collaboration] not being a high priority, so little is done, so little is achieved, which means it is less of a priority’.

Across the different groups, ADVANCE mentors agreed that a hugely significant difference from one-to-one mentoring was the difficulty of getting into a trusted personal relationship with a set of individuals. ‘With one-to-one mentoring’, a mentor commented, ‘you are trying to help someone be the best they can be, and here you can easily drift into consulting or facilitation’.

What has emerged from the impact study is that the critical elements that have been found to be vital in one-to-one mentoring are absent or hard to achieve in the case of groups. These are: clear priorities for the mentoring; clear governance relationships; trusting and close relationship between mentor and mentee; the possibility to pose hard questions to the mentee.

Less good – some logistics issues
Since mentors were volunteers, and could live in any part of the UK, it was not always easy for those coordinating the match between mentors and mentees to achieve a close geographical match. As a result, especially in the early days of the programme when mentor recruitment had just begun, mentors could be based at a considerable distance from their mentees; and this limited contact possibilities.

Another constraining factor was the sheer pressure of work bearing down on the CEO participants in ADVANCE. The very pressures that led CEOs to apply to take part in ADVANCE in the first place (typically, the combination of change in the competitive environment along with severe workforce challenges) also made it difficult for many of them to set aside adequate time to focus on the mentoring sessions.

Is there a recipe for good mentoring?
As the end of the ADVANCE programme approaches, a substantial amount is now known about what is more, and less, successful in terms of effective mentoring. Is there enough to offer a recipe that others can test in their different contexts? If the desired outcome is what can loosely be called a thinking organisation, then the following ingredients are strongly recommended.

Trust is the bedrock
Hard to gain and easy to lose, the building of trust requires time and commitment as well as mutual respect and openness. Without trust between mentor and mentee, there will be no movement, no learning, no significant action.
Both support and challenge are needed to progress
Support from the programme helped CEOs to believe in themselves; challenge helped them to stand back and reflect. The combination of support and challenge – only possible within a relationship of trust – opened up whole new landscapes of possibility and created a unique learning environment that participants truly appreciated in ways they did not expect.

The outward gaze is needed as much as the inward
The natural inclination of most CEOs under pressure was to focus on internal issues; but it was through scanning the wider horizon that constructive new directions were likely to emerge. Leadership was most effective when careful attention was paid to both internal and external issues. ADVANCE offered CEOs a winning combination of support from an internal team and an external mentor that made practical sense of what strategic thinking looked like.

Confidence is vital...
CEOs sometimes felt disempowered by the speed of change around them and what they saw as their lack of professional development to prepare them for current and future challenges. Mentors helped them to identify and appreciate the huge strengths that they brought to their jobs; to explore the role of CEO more fully; and to take up that role in a way that maximised their strengths and effectiveness and therefore their confidence.

...but so is a commitment to learning
‘You don’t have to have all the answers’, commented one mentor during a session with a CEO, ‘but perhaps it’s up to you to identify, ask and pursue important questions?’ Not having all the answers, CEOs recognised during the course of ADVANCE, represented not a point of vulnerability but a springboard for constructive inquiry. Learning was about having the confidence and skills to ask questions, think differently, and hence do things differently.

Individual learning is boosted by learning with others...
Both mentors and CEOs expressed great appreciation for the chance to share experiences and thinking and to learn from each other. Developing the capacity to learn, and then building on that learning in constructive ways – this approach was one they could often usefully share with staff and sometimes with local partners, rippling out the benefits of their own learning.

...and reciprocal learning is best
Mentors were, of course, volunteers and therefore looked for non-monetary benefits to keep alive their commitment to ADVANCE. The impact study found that there was no lack of such benefits in their eyes. Mentees welcomed the chance to benefit from mentors’ attributes such as a critical eye and a ready ear. For their part, mentors appreciated the opportunity to develop their skills and interests further, with a view to, ultimately, improving the lot of carers.

Most people relish the opportunity to co-design initiatives
ADVANCE was hugely popular with CEOs of Network Partners. After the pilot programme, word spread quickly, and applications started piling up. Feedback from many participants was along the lines of, ‘this is the best thing that Carers Trust has done for us.’ Particularly highly rated was the opportunity offered by the programme for Network Partners to participate fully in decision-making and development. Participants also participated in the research, not only in providing their feedback and insights but in making sense of the findings. The third cohort created the ‘virtuous circle’ in Figure 8 that summed up how they experienced the impact of the ADVANCE process:
ADVANCE, it is clear, was able to create an effective learning environment for experienced managers/leaders working under great pressure. This was no mean feat – raising the question of how the skill, effort, thought and creativity that went into the programme might be channelled in future to the benefit of all stakeholders. The features that made ADVANCE special can, of course, be replicated in ways other than one-to-one mentoring; and the capacity and commitment of participants in the initiative are still present, for some time at least, to be explored and drawn on.