

# Developing People Through Generous Leadership

## Part 2 - Examples

You will probably find that you are already doing work in a way that demonstrates generous leadership even if you have not previously thought of it in those terms. The examples here demonstrate how to build generous leadership into our day-to-day processes. This doesn't mean creating new work, or making existing processes more complex, more about consciously thinking about generous leadership in the way we design and implement processes.

The examples are separated into 4 categories:

1. Recruitment
2. Training
3. Managing performance
4. Exiting staff



## *People management process 1: Generous leadership and recruitment*

### Introduction

A large part of generous leadership is about working within an ecosystem, building relationships, thinking broadly and thinking of the future. Recruitment practices are a key way to demonstrate generous leadership. This may be in the audience we attract, how we test their "fit" for a role, or the types of role we offer. This section sets out some pointers to benchmark your own recruitment practices in a number of key areas and gives examples of work that other organisations have already done.

### Purpose

Recruitment is often seen as replacing a current gap in staffing, but the decisions we make when a need to recruit appears will affect the organisation for some years to come so should be made with an eye on the future and the organisation's direction of travel. An individual manager is likely to be most focussed on their immediate needs and targets, so an organisational statement can ensure managers consider the bigger picture too. With the three key features of generous leadership being sharing and openness, people at the heart, and values (principles)- based working, recruitment is often the first point at which generous leadership can be demonstrated.

### Data collection and analysis

Management information is crucial to understanding how effective recruitment processes are, but the statistics which will initially be of use are those around your beneficiaries, service users and/or clients. Do you know the diversity information for your beneficiary base? Are the service users you currently have the same as those that you wish to provide a service to in the future or are you planning to diversify? Do your current staff reflect your clients (now or in the future)?

Analyse the recruitment process at every stage. Using this information is crucial. Many organisations gather the information and report on it, but it's key to analyse the data with your diversity plan in mind. Do you receive expressions of interest and applications from your target audience? Do those people get sifted in or out- at the shortlisting stage, at the interview stage, perform well interview but not so well during any tests or presentations that you're using? What are the statistics for those successful and unsuccessful at interview? Statistics at every stage of the process is crucial for identifying where in the recruitment funnel to focus your energies.

## Example 1.1

### Offer a range of contract types

Earlier in this report, we discussed one of the three commonalities of Generous Leadership as being “people at the heart” Offering a variety of contracts provides options which are attractive to a wide range of people. For example, part-time, or part-year contracts, will enable those who cannot work full-time to apply; casual work may be appealing to those who have not thought before of working for a charity as a career. A range of contract types demonstrates generous leadership by expanding the pool of talent that joins the organisation. In the short term, we may need spend additional time writing and managing a number of contract types, but the increased pool of talent we reach should result in longer-term benefits.

#### Case study – offering paid sessional work

Hackney CVS is the umbrella body for the 1000s of voluntary and community organisations in the borough. For the last 10 years they have been developing a range of approaches which have helped to empower young people and more recently have developed some new initiatives which have improved young people’s mental health.

Hackney CVS is helping young people normalise discussion around well-being and provides concrete tools to support young people to maintain a positive mental outlook.

They recruited young people age 18-24 primarily from BAME backgrounds to deliver a series of youth led workshops. These young people are trained and paid sessionally as youth leaders, acting as mental health ambassadors, using the a variety of tools to enhance mental awareness among their peers in schools and youth clubs.

The difference this makes to those recruited is shown in the Youth Leadership Programme at Hackney CVS Report:

*“I’m a street kid but Hackney CVS made me a professional”*  
(Quote from a Youth Leader)

## Example 1.2

### Apprenticeships

#### Case study

##### London Transport Museum – The Apprenticeship Journey Planner

The Learning team, which is responsible for delivering education and learning programmes at the London Transport Museum (LTM), has six years' experience supporting, working and learning with young people.

In 2014-15 we hosted four apprentices. The programme, funded by both Arts Council England and Heritage Lottery Fund, allowed us to experiment with, and develop, a bespoke Museum-owned apprenticeship programme. It gave young people an opportunity to learn alongside us, cultivating new transferable skills and sector knowledge, resulting in enthusiastic, informed, culturally-aware professionals.

We have developed a deep understanding of how we can use the LTM collection, our two sites in west and central London, and links with Transport for London (TfL), to provide access to a range of inspiring and fun activities that meet the diverse needs of young Londoners.

Hosting apprentices at LTM has been an exciting and informative learning journey not only for the apprentices, but also for staff and the organisation as a whole. We encourage you to consider hosting apprentices to foster home-grown talent at the heart of your organisation and reap the benefits the experience will bring. To aid that we produced a planner to offer up our practical experience to the wider museum sector.

## Apprenticeship Journey Planner



The planner can be found at [https://www.ltmuseum.co.uk/assets/downloads/pdfs/LTMuseum\\_Apprenticeship\\_Journey\\_Planner\\_OPT.pdf](https://www.ltmuseum.co.uk/assets/downloads/pdfs/LTMuseum_Apprenticeship_Journey_Planner_OPT.pdf)

### Example 1.3

#### Raise the profile of the organisation

If few people apply for roles, or if your applicants are not from diverse backgrounds, you may benefit from promoting the organisation. Raising awareness of the organisation before a vacancy even arises means that when recruitment takes place, you are no longer “cold calling” for applicants, but already have a reputation that potential candidates recognise. Generous leadership is about openness and sharing so looking for opportunities to do this will pay off when future recruitment takes place.

Applying for awards is a good way to raise the profile of an organisation. Not only is this an opportunity to promote the organisation, but awards are a good way to share best practice and promote networking across the sector, thus demonstrating generous leadership.



Community Engagement Award at the 2019 African Diaspora Awards

## Example 1.4

### Have a variety of entry points

If an organisation is trying to be more diverse, it may suffer from potential candidates looking at the current organisation and opting out of applying. Increasing the variety of access points to the organisation can help. Some potential candidates may have their first point of contact with the organisation by:

- being a beneficiary
- volunteering
- work experience while at school, college or university
- short-term placements
- paid internships
- pairing with local schools

These opportunities enable potential future applicants to gain first-hand experience of the organisation which may then encourage them to apply for a role in the future.

#### Case study: Eris Yeates – volunteer then employee

I started volunteering because I was out of work and looking to get experience to put on my CV. I wanted to do interesting work for an organisation that was doing something good. I sent my details off to a number of organisations and Terrence Higgins Trust offered me volunteering experience on an interesting project.

I started in November 2017 and worked on a specific payroll project. This got me back into working mode and gave me something recent to put on my CV.

In June 2018 the role of Financial Accountant at Terrence Higgins Trust became available. I applied, was successful and still work here in that role. I'm really pleased that things have turned out this way, Terrence Higgins Trust is a great organisation to work for and my job is exactly what I was looking for.



## Example 1.5

### Look at your brand

Where there is no existing relationship, the organisation has to be especially focussed on how it represents itself in job adverts, for example, promoting the ethos and energy of the organisation as much as the role itself. This then needs to be followed through with the organisation's website – often the next piece of organisational information that a candidate looks at. Looking at the key features of generous leadership will help give an uplifting narrative to what the organisation is here to achieve and how it operates.



## Why join Terrence Higgins Trust?



### A courageous organisation

We formed in 1982 following the death of Terry Higgins, one of the first to die from an AIDS-related illness in the UK. Since then, we've acted boldly and passionately to meet the challenges of this ever-changing epidemic. Now as the UK's leading HIV and sexual health charity, we are looking to take new, innovative steps to drive forward our ambition.



### An ambitious organisation

We believe that by 2030 we can end transmission in the UK whilst providing support to those living with HIV and ending stigma and discrimination. Together with our beneficiaries and partners, we are working to make this a reality. Through digital technology, and bold, new ways of reaching those in need, we will reduce transmission, improve sexual health and help people living with HIV thrive.



### A people organisation

Our beneficiaries are at the heart of everything we do, driving how we work, where we work and what we do. Our talented staff create our innovative and engaging programmes, many of whom are also living with HIV. Our passionate supporters and volunteers enable us to do everything we can to make a difference to so many lives.

Terrence Higgins Trust makes people's lives better every day. Come and do the most meaningful work of your career. Whatever your story, we want to hear from you. We particularly welcome applications from those with a Black, Asian and Minority Ethnic (BAME) background and from people in the LGBTQ+ community.

Visit the Terrence Higgins Trust jobs website:  
<https://www.tht.org.uk/our-work/jobs>

Terrence Higgins Trust is a registered charity in England and Wales (reg no. 288527) and in Scotland (SC039986). Company reg. no. 1778149.

## Example 1.6

### Interview process

A diverse panel is ideal when recruiting, however this can be difficult to achieve if the organisation is currently not very diverse. In fact, this approach could lead to the same person from an under-represented group being called on to sit on panels constantly. As different charities tend to have different staff profiles, rather than continuously call on the same people, we could offer to sit on panels for each other, eg, a charity which focuses on supporting LGBTQI (lesbian, gay, trans, queer, intersex) beneficiaries may need to increase its ethnic diversity; and a charity which focuses on BAME (Black, Asian and minority ethnic) beneficiaries may not have as great an LGBTQI representation. By working together, they could both have more diverse panels, and provide their interviewers with broader experience which could aid them in their own careers. They will also build the relationships between the two organisations, and will be able to discuss this approach with other organisations. This will help promote the concept of generous leadership within recruitment, improve brand recognition and ultimately reach a wider pool of potential applicants.

As with many aspects of generous leadership there may be an initial outlay that is rewarded with improved partnerships over time. Involving interviewers from an outside organisation does add complexity – do the cultural values align? Do both organisations have similar policies and train their recruiters similarly? This will need careful planning but it should become easier with practice.

### Evaluation

A clear recruitment process and a trained, diverse panel are important. These things are often written into policies, but a key part of generous leadership is practice – what actually happens on the ground. Quality control will be important and can come in at different stages – writing of job descriptions and adverts, question design, questions asked and notes taken at interview, the decisions made, and the quality of feedback given to unsuccessful candidates.

Evaluation is the final section of this recruitment category, but it is probably the best place to start whenever you are running a recruitment exercise. Every time you go through a round of recruitment you will make more unsuccessful candidates than successful ones. Virgin Media discovered that unsuccessful candidates were being negative about the company and cancelling their subscriptions. After re-designing the recruitment process and retraining managers, they found significantly better Net Promoter Scores (how likely it is that someone will recommend a business)<sup>1</sup>.

The ability to use business metrics helped Virgin Media to persuade the business of the importance of how it treats its candidates. Many organisations won't have such clear metrics to help them, but the message is the same - recruitment should be a positive experience for all, not just those who ultimately join the organisation.

<sup>1</sup><https://www.youtube.com/watch?v=SfnQWPHGH8A> The Commercial Impact of Candidate Experience – Graeme Johnson – Talent Connect 2016 – accessed 22/03/19

## **Introduction**

Generous leadership is a relatively new term and one that will be new to many people. Training focused on explaining generous leadership will raise awareness, but also broader training on valuing diversity, thinking about the broader picture and remembering to consider the "ecosystem" will be beneficial.

### **Example 2.1**

Terrence Higgins Trust has a Management Development Programme that covers a range of management best practice. It incorporates a session on generous leadership, using discussion based on the following slides::

**What does the term  
generous leadership  
mean to you?**

**The definition used by The National Lottery  
Community Fund is:**

- A concern with the development and success of the 'ecosystem' rather than purely the 'organisation.'
- A willingness to share responsibility and power to achieve the common good.
- Openness with which we share experience, knowledge and skills.
- The drive to build alliances with individuals, groups and communities to achieve shared goals.

How can you demonstrate generous leadership in your role? Consider the following aspects:

- Working with others in the sector
- Leading your team
- Managing day-to-day tasks
- Managing your manager
- Working with others in the organisation
- Managing yourself



**We are part of an ecosystem: not alone, not just today. So we need to build relationships, think broadly and think of the future.**

## Evaluation

Every manager at Terrence Higgins Trust completes a management programme that includes a session on generous leadership, shown here. Managers who have been through the programme have since been sharing their own ways of putting generous leadership into practice in their own work. Examples include:

*"I got a phone call from another charity who is starting an employability course. I could have seen this as a threat to our scheme, but because of the generous leadership training I looked at it again. Their programme is very different to the one we run and it didn't cost us anything to share our materials with them. As a result, they are going to promote our scheme to their participants. In the end, this is about giving beneficiaries options so they can choose the scheme that works for them."*

Ruth Burns - National Work Positive Programme Manager

*"Generous leadership is the approach we've been adopting in recent months to building new relationships within the sector. Instead of waiting for directly funded opportunities to work with other agencies, we've been getting to know them and offering our experience and expertise as and when appropriate. The "social ecosystem", is a great concept, The hope is that these contacts will develop and grow over time, creating alliances that can come together to go after relevant new business when it comes along."*

Clive King – Service and Partnership Manager

*"We have a burgeoning relationship with Scottish Drugs Forum – they are currently hosting our Tuesday night clinic at their offices and we're redesigning our clinical pathways to accommodate their "at risk" beneficiaries. We're learning a lot from each other and managers at both charities have already discussed the possibility of co-tendering for relevant work in the future."*

David Bingham – Service and Partnership Manager

## *HR Process 3: Generous Leadership and performance*

### Introduction

This section covers the main part of the employee journey; they have gone through the first stage of learning and understanding the organisation, their probation is probably completed, they understand and align to the culture and now are getting into the substance of their role and making it their own.

This is where most of us spend most of our time in our career(s).. We want people to bring their whole selves to their role(s) and their organisation(s) so that they experience fulfilment through:

- thinking (commitment to **accomplishing** for an organisation)
- feeling (how they **appreciate** the organisation)
- doing (the **performance** of the role to achieve organisational goals for stakeholders).

Alongside these personal aspects of accomplishment, appreciation and performance, we have the organisational aspects to consider too:

**People** – empowered to stretch themselves to grow professionally and to feel motivated personally by strong engagement with the organisation

**Process** – the organisation creates a toolkit that enables a safe, accountable, structured working space that facilitates personal growth

**Culture** – The overall space that the organisation creates for its ethos and approach within the ecosystem to flourish

This section too, includes how the individual can play a role in the wider ecosystem – especially through volunteering.

## Example 3.1 Framework

	<b>People</b>	<b>Process</b>	<b>Culture</b>
<b>Accomplish</b>	Are clear what the organisation is seeking to achieve, its vision and its purpose	Has clear processes and procedures to ensure legal compliance and best practice and to maintain a clear forward direction of travel	Is forward thinking, innovative, optimistic about its future, and demonstrates adaptability and fluidity when faced with external challenges
<b>Appreciate</b>	People believe, and are committed to, the values and ethos of the organisation to carry out its purpose for the benefit of its stakeholders	Processes are fair, equitable and understandable to non-specialists. Individuals can understand how they apply to them and when, enabling them to be fully present at work	The organisation is invented and re-invented by all its stakeholders, recognising that it is valuable, and continues to be valuable, to all these groups throughout its history
<b>Perform</b>	Are clear about the actions and outcomes they are aiming to do	There are clear tools to deliver, capture and evaluate the work that is done	All are clear about how the collaborative effort of the individual parts of the organisation create the overall purpose

## Example 3.2

### 1:2:1s

There is a phrase "people join organisations, leave managers". This has to some extent been debunked, but the combination of good management and good leadership has been shown to make a difference to staff engagement. Research by CultureAmp, shows the impact of management and leadership combined. A good manager on their own is not enough to make a big impact on an individual, but greatly amplifies the effect of good leadership in an organisation.

Great manager, but poor leaders  <b>38%</b>	Great manager and great leaders  <b>89%</b>
Poor manager and poor leaders  <b>22%</b>	Poor manager, great leaders  <b>60%</b>

(<https://blog.cultureamp.com/whats-driving-employee-retention>)

Regular 1:2:1s are a key process in demonstrating being a good manager. Such meetings ensure that people are clear about the actions and outcomes they are aiming to do; and get feedback on the work that is done.

1:2:1s enable an individual to get feedback on their performance – and to give feedback to their manager. Both parties need to contribute for the process to work effectively. As with other aspects of generous leadership, the benefits of this shared commitment will be seen in the longer term.

## Sample of Terrence Higgins Trust's supervision policy:

It is expected that managers and employees participate in supervision in the spirit of the charity's values and Rights and Responsibilities framework.

In essence, this means that managers should:

- provide supervision and recognise that it is a regular, committed, prioritised time
- give constructive and supportive feedback which assists development and celebrates good work
- set realistic and achievable goals and commit to actions agreed
- create a space and atmosphere of trust where employees feel supported to raise issues and matters of concern

The individual being supervised should:

- participate and take an active role in supervision by thinking in advance about what they wish to discuss and have reviewed previous actions
- be open to hearing, reflecting and acting on feedback given
- identify job related issues and any personal issues they wish to raise
- be committed to achieving the actions agreed

## Example 3.3

### Volunteering

Volunteering initiatives are an excellent way to demonstrate generous leadership: an organisation is open about the gaps that it needs to fill; another organisation gives staff time to volunteer; and the volunteers themselves step outside their comfort zones for the benefit of another part of the sector. At Terrence Higgins Trust, we involve volunteers in many of our activities:



Volunteers fundraising and doing sexual health outreach in London



Volunteering meant I felt more encouraged to look for paid work.



Tam Degnan

Volunteer

## Tam Degnan

I have been volunteering with Terrence Higgins Trust in Scotland for around six years.

Most of my volunteer work has been through the Glasgow office but I have travelled across Scotland to support a number of activities.

These include outreach in cruising areas, running health promotion and advice stalls at community events and fresher's fairs, managing request for the free condom by post scheme (**Get Rubbered**), facilitating group work with people living with blood-borne viruses and supporting events such as Pride and **World AIDS Day**.

Being part of an organisation that supports people living with or affected by HIV is really important to me. It has helped me in my personal journey while recovering from substance misuse. It has also helped me deal with the loss and anxiety I have felt as a result of friends and those dear to me being directly infected or affected with/by HIV and other blood-borne viruses.

I also wanted to contribute to fight against stigma and gain skills to challenge the negativity that can arise from peoples lack of understanding and gain the skills to do this more effectively.

<https://www.tht.org.uk/take-action/volunteer/volunteer-stories>

## Example 3.4

### Enabling staff to volunteer

The National Lottery Community Fund organise group volunteering sessions. Staff from their Newcastle office spent a volunteer day supporting a local charity in North Shields called Meadow Well Connected. Local volunteers there play an important role in supporting a variety of community based activities ranging from employment support, breakfast and tea clubs for young children, growing fresh fruit and veg that are donated to local food-banks as well as a variety of community activities that brings all generations together.

Such sessions build relationships and improve the health of the whole ecosystem.

## Example 3.5

### Make volunteering easy

Volunteering doesn't have to be time consuming. The Careers and Enterprise Company created a network to strengthen links between education and employers so that together they can inspire and prepare young people for the fast-changing world of work. They offer a number of roles for people to volunteer their experience – one of which is "Give an Hour". This can be speaking to a class about a work sector, playing a role in a business competition or carrying out a mock interview. This demonstrates generous leadership in the way that the organisation is investing staff time for no direct benefit, but the actions help staff to feel motivated, help raise the profile of the organisation and help raise the skills and potential of those who may come to work in the sector in the future.

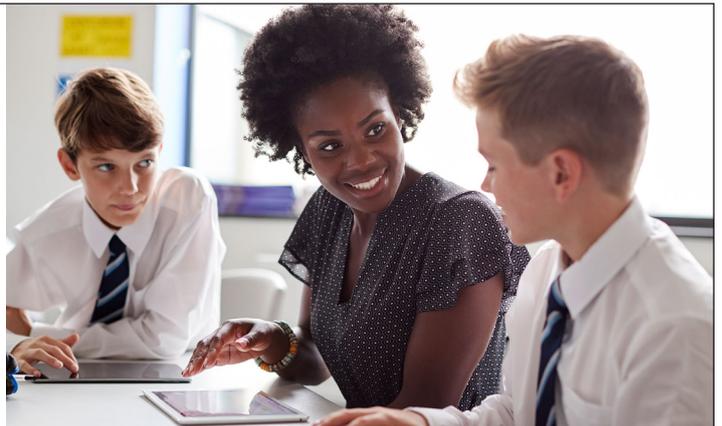
<https://www.careersandenterprise.co.uk/give-an-hour>

#### Benefits to your business

The Give an hour campaign is a great way to give something back to your community and ignite your team at the same time.

It helps give young people in your area the skills and knowledge that they need while potentially finding new recruits for your business.

By becoming involved, you can shape the future leaders in your community.



I love CV writing, interview skills and personal brand sessions with young people, it gives me an amazing feeling of giving back and the feedback I get is truly uplifting and invigorating.

**Sarah Hopkins** Director, Hopkins Longworth Ltd

At Terrence Higgins Trust, we call this micro-volunteering. By signing up to the scheme, people are notified by text of upcoming, bite-size opportunities, for example, helping preparations for fundraising activities, completing short administrative tasks, helping out at stalls or supporting the organisation at events. This is generous leadership from our perspective – being open about the gaps we have and grateful for the support of others in the work that we do, and also generous leadership by those who volunteer – doing something for the greater good of the sector.

## Evaluation

As shown in the CultureAmp report above, both management and leadership can have a huge impact on people's experience of work. Policies are a first step, but clear and accurate recording of actual practice is also needed. For example, quantitative and qualitative evaluation of annual appraisals should be conducted and openly reported on. This openness is one of the key features of generous leadership.

The NCVO summarise the benefits that volunteers can bring to an organisation:

### Why involve volunteers in your organisation?

Involving volunteers can add great value to what your organisation does and support you to achieve your mission and strategic objectives.

Involving volunteers can help you to:

- Engage a more diverse range of skills, experience and knowledge
- Reach more of your beneficiaries
- Raise awareness about your cause as well as your organisation, its profile and what you do
- Build relationships within the community in which you work and contribute to supporting others in your community. By providing volunteering opportunities you provide opportunities for social inclusion, skills development and potential routes to employment. There is also evidence that volunteering can help to improve health and well being for individuals
- Inform the development and delivery of your activities, projects or services by bringing in new opinions, ideas or approaches. This can help you to adapt, stay relevant to what your beneficiaries and community needs as well as identifying opportunities to improve what you do
- Deliver your service or projects in a more effective and efficient way which can help to save money and resources. However organisations

<https://knowhow.ncvo.org.uk/your-team/volunteers-and-your-organisation/why-involve-volunteers>

And they report that volunteers themselves gain many personal benefits from volunteering, including enjoyment and improved wellbeing. However, they also noted that more could be done by employers to actively promote and encourage volunteering. Volunteering fits so well with generous leadership that this seems to be a clear area where improvements can quickly be made (NCVO, 2019).

### Introduction

When a member of staff leaves, that is a key time for an organisation to demonstrate generous leadership. Staff often leave to go to other roles in the sector and even if they are not, they still take with them the knowledge and experience of working in our organisation which can make them great ambassadors.

Very few people expect, or want, to stay with one organisation for their whole career. A recent survey found that "43 per cent of millennials plan to leave their current jobs within two years and only 28 percent have plans to stay beyond five years".<sup>2</sup>

Rather than hide from the fact that people will leave our organisations, let's make this an opportunity to demonstrate generous leadership. We spend a lot of time and effort inducting someone when they join the organisation, but when they leave, we tend to do an exit survey at best. Staff leave – but technology now means that people don't have to lose touch.

**Ways to improve the process from a generous leadership point of view include:**

- Do exit surveys, report on them publically and tell current staff what actions you take because of them. This openness allows staff to feel listened to and will help improve the organisation in the long-term.
- Send them a letter or card from their manager, or, if realistic, from the CEO. Make it personal thanking them for the specific contribution they made to the organisation.
- Encourage staff to be on LinkedIn so they can keep in touch with colleagues – and send them an invitation from the organisation's LinkedIn account. Similarly, suggest that, if they use Twitter, they follow the organisation and re-tweet to promote the organisation.
- Tell them about Glassdoor and ask them to leave a review.
- Create an alumni network, share information with them, ask favours of them, offer them things (eg attendance at webinars, or sell courses to them and their new organisation at a discount).
- Let them know they can keep in touch, just because they have left a role, it doesn't mean that they can never ask for help or guidance from those they previously worked with.
- Add them to customer databases (in line with GDPR). Ask them to volunteer for you, or fundraise for you.
- Give them a leaflet about what they can do for you now. If this includes 3 key messages for them to state when people ask them about the organisation they just left that gives them something to focus on.
- Invite them to social events, especially in the first year after leaving.
- Have a re-union when you invite lots of leavers to meet. This is an opportunity to update them with the organisation's current messages and let them know of any job vacancies they can promote to their networks.

- Ensure you have processes to capture their knowledge and their latest actions so that handovers can be smooth and managed.
- Give time for good handover notes and archiving of work (paper and electronic)
- Have a proper handover with them. This helps the organisation retain the knowledge and helps them feel that the work they have done is valued and important
- Give them a day's leave during their notice period and ask them to come back for a day in the month after they have left so they can share any final thoughts and can tell current employees about the new organisation they work with.
- Contribute to a leaving present, facilitate leaving cards.
- Acknowledge a person's leaving in internal communications. Make it personal to the individual.

Opportunities to "leave well" are a great example of generous leadership – action now that will benefit the individual and the "ecosystem" for years to come, creating a growing group of ambassadors for your organisation both in person and online.

<https://www.independent.co.uk/life-style/millennials-jobs-career-work-salary-quit-young-people-study-a8361936.html>

## Example 4.1 Training outline

The following are training materials which support line managers acting positively and in line with generous leadership when staff leave.

### Trainer's notes

#### Managing when someone leaves

We often talk about the induction process – managing when someone starts a new role, but we rarely talk about what to do when someone leaves. Most people move jobs during their career so you are likely to have to manage the process at some point.

Each circumstance brings with it its own policies to follow and sets of emotions to be worked through. Each is a change for the individual, and also for their staff, manager, colleagues, clients, contacts in other organisations.

Applying a generous leadership approach to staff leaving can provide real benefits to an organisation. Nancy Duarte talks of the boom her company had when one of their clients made staff redundant. Those staff went to work with other companies and took with them the recommendations of her work, increasing the number of new work contracts she got. When people leave, they don't disappear, they will often join other similar organisations. Providing a positive end will help the organisation be more embedded in the sector and develop links with new organisations. You're not losing an employee; you are gaining a contact in another organisation and an ambassador for your own organisation.

This training guide provides the outline for a workshop for managers to explore the leaving process to ensure a generous leadership approach is taken. It forms a session within a wider course, but can also be used as a standalone exercise in a management meeting.

## Trainer's lesson plan

Timing	Objectives	Teacher Activities	Learner Activities	Assessment
5 minutes	Introduction	Introduce topic, state we more often think of induction, but exiting is a natural part of work too.		
10 minutes	Exploring reasons and circumstances of people leaving,	Ask the group: what are the ways people leave a role, eg, they resign to start a new role. List answers on flipchart  Then discuss – Which ways are most common? Which HR policies are relevant?	Group activity, complete flipchart	Reasons should include at least: resign to go to a new role (either in or out of the organisation) resign for family or other reasons be made redundant retirement ill-health may force them to leave death in service promotion
10 minutes	Impact of that person leaving.	Ask the group what issues are raised by a person leaving. And what emotions are raised?  Are some scenarios more difficult to deal with than others? What makes them difficult?	Split group in 2, one group to discuss possible issues to be managed; the other, possible emotions raised; Hear from both groups.	Issues should include: Continuity of service for beneficiaries; Ongoing management and support of the team the person managed or worked in; access to information and records after the person has left; contacts for stakeholders; the person themselves retaining information they need (payslips printed off, email contacts kept)
10 minutes	Issues regarding information.	Ask: what issues might occur. For each, how can you avoid, reduce likelihood, mitigate risk of it happening or being an issue.  Give handover notes handout.	Pairs to work together discussing their real work areas.	Cover: Handover notes Face-to-face handovers Deputies and pairing systems Client relationship management systems
10 minutes	Maintaining and developing the relationship.	Explain the networking effect on people moving to other organisations. Ask for ways to support this, prompt for technological ones		Cover: Keeping in touch Mailing lists LinkedIn WhatsApp Twitter Invitations to events Professional network groups Invitations to training

Timing	Objectives	Teacher Activities	Learner Activities	Assessment
15 minutes	Managing redundancies or dismissals.	Ask the group, what you as a manager will need in order to support someone else.		Need: Support yourself Background information on the redundancy/ dismissal process Knowledge of this particular case and why it is happening Knowledge about the person involved – sick record, living alone, etc. Training in managing challenging conversations
10 minutes	Supporting colleagues and replacement.	How did you support: Colleagues Newcomer (if there is one) Beneficiaries	Discussion	Link to induction processes Coaching for continuing staff Reassurance to beneficiaries Meet and greets
5 minutes	Summary	We all leave roles, the circumstances vary, but we want to make it a fair process with a positive outcome – for all.		

Handout:

### **What makes a good handover?**

Handovers are common in many roles, for example nurses use handovers between shifts to ensure continuity of care. Handovers are especially important when an individual leaves a job. Even if they are just moving to another part of the same organisation they should do a handover – it is amazing how quickly we forget key parts of a role once we have left it!

Handovers are not just what happened in the last week, but cover the past, present and future:

- Past: how did live issues begin? How long have they been owned by this team? Is there anyone else in the organisation that used to do it? What has already been agreed and what actions have been taken? What budget and other resources have been assigned?
- Current: what have been the most recent activity/ product/ interaction? Is anything overdue? Are you expecting something from someone? Where is the data held?
- Future: what has to happen next? What is in the diary? When are the key deadlines?

A good handover ensures that the new person feels supported and they can be productive from the moment they started. The aim is for service to continue without break.

You may have existing databases that help you record actions and next steps but if you don't you will probably need to start one for the final month in a role. Use it to capture things as they come up. You can use the table on the following page as a structure for this.

Don't leave it to the last minute and don't do it without notes. You and your manager will need to make sure you allocate sufficient time to the process. The handover will be good for the new person starting, but equally, it allows the person who is leaving to "leave well" in a positive and well-managed manner. We strive to be a generous leadership organisation; when a member of staff leaves, that is a key time for us to demonstrate this. We aim to provide a positive welcome to our newcomers, and maintain a positive relationship with those who leave.

Further reading:

<https://www.wikihow.com/Do-a-Handover-in-an-Office>

<https://work.chron.com/write-handover-report-3331.html>

(these are internet links so may go out of date, if so use a search engine for "job handover notes uk")

Handout:  
**Handover Table**

Topic	Ultimate goal, purpose	Most recent action	Next step required	File references	Key contacts	History/ comments
Regular meetings:						
Upcoming events:						
General contacts:						
Equipment and resources available:						

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accessed 31/10/2018

FranklinCovey OnLeadership podcast episode 18 featuring Nancy Duarte 25/09/2018