

FORWARD
INSTITUTE

IMPACT REPORT

2021/22



INTRODUCTION

The Forward Institute feels like a very different organisation to the enterprise we founded in 2015. We can see small glimmers of our contribution in lots of places. The movement of responsible leadership is growing. However the complex challenges we all faced continue to unravel.

Continuing pressures on our economy, the wider geo-political climate, the challenges on our planet, pressures on migration, and the cost of living. We have to maintain our imperative to help leaders to anticipate the road ahead. That will involve us scaling our work to a new level.

We need to think more deeply about our impact.

In 2021/22 we worked with 52 organisations and community organisations, exploring with them ethics, sustainability and inclusion among other things. Over 500 Fellows have joined our community, crafting a new movement of responsible leaders.

As we invest in scaling up our organisations to meet the demand we see, we now need to work out how to evaluate our efficacy over the long term.

So we're trying something different this year.

This is our first annual impact report. It aims to be an honest assessment of how well we are doing in terms of what we are trying to achieve. You will see what has gone well and what needs development in our approach is increase impact in the context of our strategic objectives. I hope it at least offers an insight into the hard work, joys and successes of an institute that is now 7 years old.



SIR ANTHONY SALZ
Chairman, Forward Institute

“The Forward Institute team helped break down years of entrenched learned behaviour, stove-piped ways of working, parochial thinking, and directive leadership/management. They helped us create an energised leadership team that thought broader and deeper about who, what and how we did what we did.”

**LT GENERAL
IVAN JONES**

Ex-Commander Field Army



Fellows enjoying the Sandhurst experience.

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WE'RE BUILDING A MOVEMENT

We are a non-profit Institute focused on embedding responsible leadership at the heart of influential organisations. We catalyse communities of leaders, to live the principles and practices of responsible leadership. We help them to mobilise their organisations to tackle the most important challenges faced by society and our planet by:

► **Creating Connections**

Convening leaders from the widest range of the UK's leading private and public sector organisations, to participate in exploratory, residentials and live events

► **Changing the System**

Working with partner organisations to support them to become exemplars of purpose and responsibility embedding systemic change within

► **Influencing the Conversation**

Providing policy and research to arm the wider world with the core principles of responsible leadership

We've now built a community of 500+ Fellows who work in some 35 of society's most influential organisations, all of whom are committed to making change and acting for the good of society.

From the British Army to Tesco, Barclays and BP, we work with Chief Executives and senior leaders in peer groups to support and challenge, bringing them together with community activists to learn from each other.

Ultimately, we have one goal.
To make responsible leadership
the only leadership.



CONTEXT

This report looks at the Forward Institute's work during March 2021 to March 2022, a period in which a global health crisis brought with it a focus on the challenges facing our planet and its people.

The COVID-19 pandemic demanded of the world's leaders both speed of reaction to the management of health, workplace, workforce and business viability, and simultaneous deep reflection and attention to the groundswell of issues that had become our 'normal': the disparities in our systems, processes and behaviours that lead to social inequity, destroy our planet's sustainability and thereby create irreparable harm.

No responsible leader can ever forget the conditions that led to the rise of civic activism that ignited worldwide, following the murder of George Floyd in the United States. Nor can we ignore the means by which we emerged from lockdown.

The changes to our working environments, technical capability and digital poverty; a renewed acknowledgment of the importance of human connection and engagement; the challenges to our economic, environmental and emotional survival: in 2020/21 the Forward Institute has supported leaders facing multiple challenge.

Little wonder then that our growth during and since lockdown and beyond has been significant. No responsible leader can afford to ignore the lessons learned during the pandemic: the need to embed responsibility in growth, and ingrain ethical stewardship in organisational objectives. Humility, curiosity and collaboration are the newly identified drivers of leadership. We are ambitious about supporting leaders to draw on this deep vein of experiential learning - and with them we stay humble, curious and committed to collaboration to continue to seek solutions that work for all.



ADAM GRODECKI

Chief Executive, Forward Institute

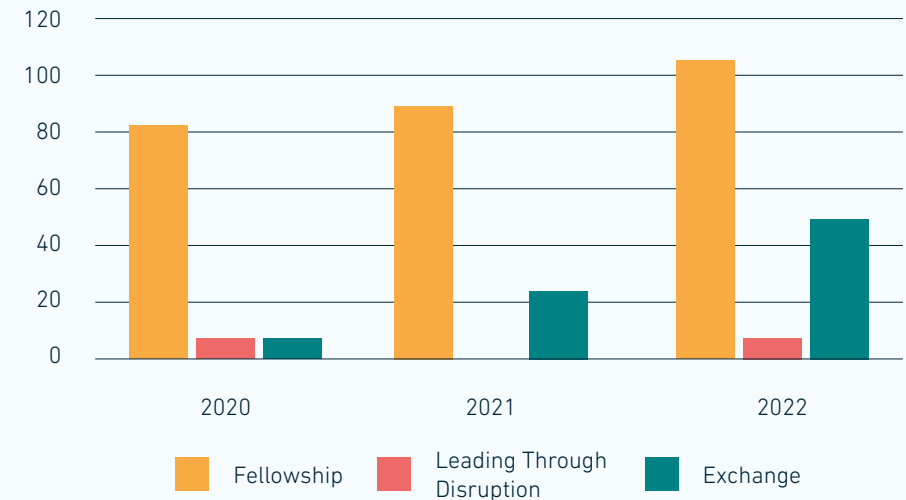
FORWARD INSTITUTE IN NUMBERS

The pandemic saw a sea change in responsible leadership as organisations sought practices and principles to look after their employees and wider society.

- ▶ Turnover increased by **79%**, from £1,551k in 2020-21 to £2,782k in 2021-22
- ▶ **The workforce has grown:** from a team of 15 people in 2021, we now employ 26 staff and have a roster of 10 contractors with whom we work regularly
- ▶ Certified "**Best in the World**" for our Workers by B Corp
- ▶ B Corp score from **87.4 to 115.1**

COHORT SIZES

The number of participants in our programmes have increased and this widens the potential impact we can have through our partner organisations.



FELLOWSHIP SURVEY 2022

Responses from the last cohort to complete our leadership programme (March 2022)



CONNECTION

EasyJet and Oxford University

The Forward Institute engenders connections across sectors and disciplines, to bring about systemic change. These connections can be most powerful when we bring together businesses and approaches that don't typically meet, and rarely mix.

We matched as Learning Partners Ed Brooks, who leads Oxford University's Oxford Character Project, with Matt Callahan, EasyJet's Director of Customer & Operations. The result: a fresh look at the impact of tourism on the climate and local communities.

What began as a conversation about EasyJet holidays' sustainability ideas and ambitions a year prior, became an opportunity for joint exploration through the establishment of a new kind of research lab at the University of Oxford. The first cohort of 20 student Fellows joined the Lab in January 2022. They were given access to a newly designed 17-week training programme, and the opportunity to work collaboratively with EasyJet Holidays on progressing its commitment to advance the UN SDGs in the area of sustainable tourism.

Since pairing up, Matt and Ed have also spent a considerable amount of time thinking about the idea of complexity and the ways in which universities and companies approach this. As Ed explains,

"Universities love complexity, but in a certain kind of way. We take a complex problem and go 'let's go really deep, exploring and understanding it as rigorously as we can.' But that takes time and so research is sometimes not as quickly connected as it might be to the context in which the complexity exists and problems that need to be addressed in the present."

In contrast, a big part of a commercial company's culture is moving at speed and the tendency to test and then move on to the next thing. By working with the Lab, Matt's learning has been 'to be comfortable being uncomfortable and bring an open mind. Just go with it and see where things could take you.'

As the Lab's first year comes to a successful close, there is huge satisfaction in seeing the first set of ideas actually coming to fruition in impactful projects that will really lead to change.

CHANGE

A new approach to public service delivery: Wakefield Council's Big Conversation

"The NHS and local government services are working with people to have the best services that they can have. But the current model is to deliver services to people in the way you think they want them, without having conversations with them about what they want.

As part of the Collective Change Initiative, we listened to a variety of incredible stories of change. We were particularly struck by the Real Living Wage campaign and how the project's leaders started out by asking people about their experiences. They started from the foundational belief that in order to build better services, with better outcomes, you need to start by genuinely listening.

It sparked something.

We realised it was important that we didn't decide by ourselves what the specific challenges and issues were for our communities. Instead of starting with our own questions, our starting point was going out, talking to the residents and letting them shed light on the issues we needed to tackle.

So we are having what is called a Big Conversation.

We have trained over eighty staff and community researchers from right across different organizations such as the NHS, housing and Healthwatch to have what are called 'asset-based' conversations with our residents. These are conversations that draw out the positive elements – or assets – of the community.

We've learnt so much from the Forward Institute. Margaret Heffernan is a great example of someone who has really pushed to have diversity of thought within teams. A lot of her work around wilful blindness is all about fostering an environment that allows people to challenge, to criticise, to listen to those voices that are different from yours. I also realised from Margaret's work that, because I'm massive optimist, for example, we need those pessimists too!"

"And how's it going? From last week, we can now say we've had 1209 conversations!"

ANNA HARTLEY & JO FITZPATRICK
Directors of Public Health

INFLUENCE

HR network

The Forward Institute has a strong network of HR professionals that we support as part of our commitment to make responsible leadership the only leadership. As a business function, HR is all about development and change. Ultimately, it lies at the heart of some of the biggest current responsible leadership debates, from flexible working to diversity and inclusion. So, what does responsible leadership look like for those working in the HR space? As part of our strategy we run a series of events and roundtables for our HR leaders to discuss the responsible leadership dilemmas they face as well as which issues we believe HR professionals are best placed to positively influence.

Diversity, Equality and Inclusion

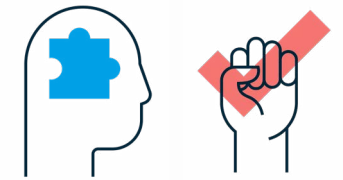
To tackle some of the most challenging issues we face as a society, we need to bring together a truly diverse set of organisations.

We regularly question if there are missing voices in the room and, where possible, use our funding to bring in organisations or individuals who offer different perspectives.

We work to ensure that our selection of leaders to our programmes does not perpetuate historic injustices around promotion, succession planning and inequality of those with protected characteristics, who are from low socioeconomic backgrounds - and we acknowledge that we've work to do, particularly on participation of disabled leaders. We regularly review applications with close attention to inclusion. We've work to do: in ensuring that inclusion is monitored across all our programmes, and also acting on the findings wherever there is room for improvement in our engagement with others.

Areas for improvement

There are a number of areas that we are still working on at the Institute. A key one is the ongoing work into the diversity of organisations involved in all our work. We have gaps we are working to fill in terms of organisations, most notably in tech, culture, life sciences and sport. We need to work more closely with our partners to build and support a more diverse pipeline of talent to ensure that we are part of the solution and a mechanism for change, rather than perpetuating existing systemic problems.



The background features a dark blue vertical bar on the left side. The rest of the image is composed of two overlapping triangular shapes. A large, light orange triangle points towards the right, while a smaller, darker orange triangle is positioned behind it, also pointing right. The word 'PROGRAMMES' is written in white, uppercase letters on the light orange triangle.

PROGRAMMES

PROGRAMMES

Over the past 12 months, the Fellowship Programme has continued to develop as we prepare to welcome the 8th Cohort of 120 new Fellows. In recent months, we have undertaken a review of the final phase of the Programme (Engage) to ensure that it is preparing Fellows to be active in the wider Fellowship. This has resulted in an adjustment to our content and delivery including stronger foregrounding the work of the Fellowship, and the introduction of a bespoke session at the Sandhurst residential focused solely on the benefits of participating in the wider Fellowship.

We will also be introducing a new meeting bringing Fellows in each Cohort face to face with their CEO and senior leaders of their organisation to set out their progress through the Programme while providing a platform to have a conversation on how a stronger culture of responsible leadership could be implemented in their organisation.



For the Fellowship Team, we assess impact through the active engagement of Fellows on the Fellowship Programme and the way in which they bring responsible leadership to their role and their organisation. We want to see Fellows completing the Programme being active members of the wider Fellowship community, hungry for change that impacts on their organisation, the community they work within, and within wider society. By making responsible leadership the only leadership, we should, through the coalition of organisations that we work with, begin to see real change in how organisations work, taking greater account of the impact that they have within wider society.



Cohort 6 residential, Wellcome Institute

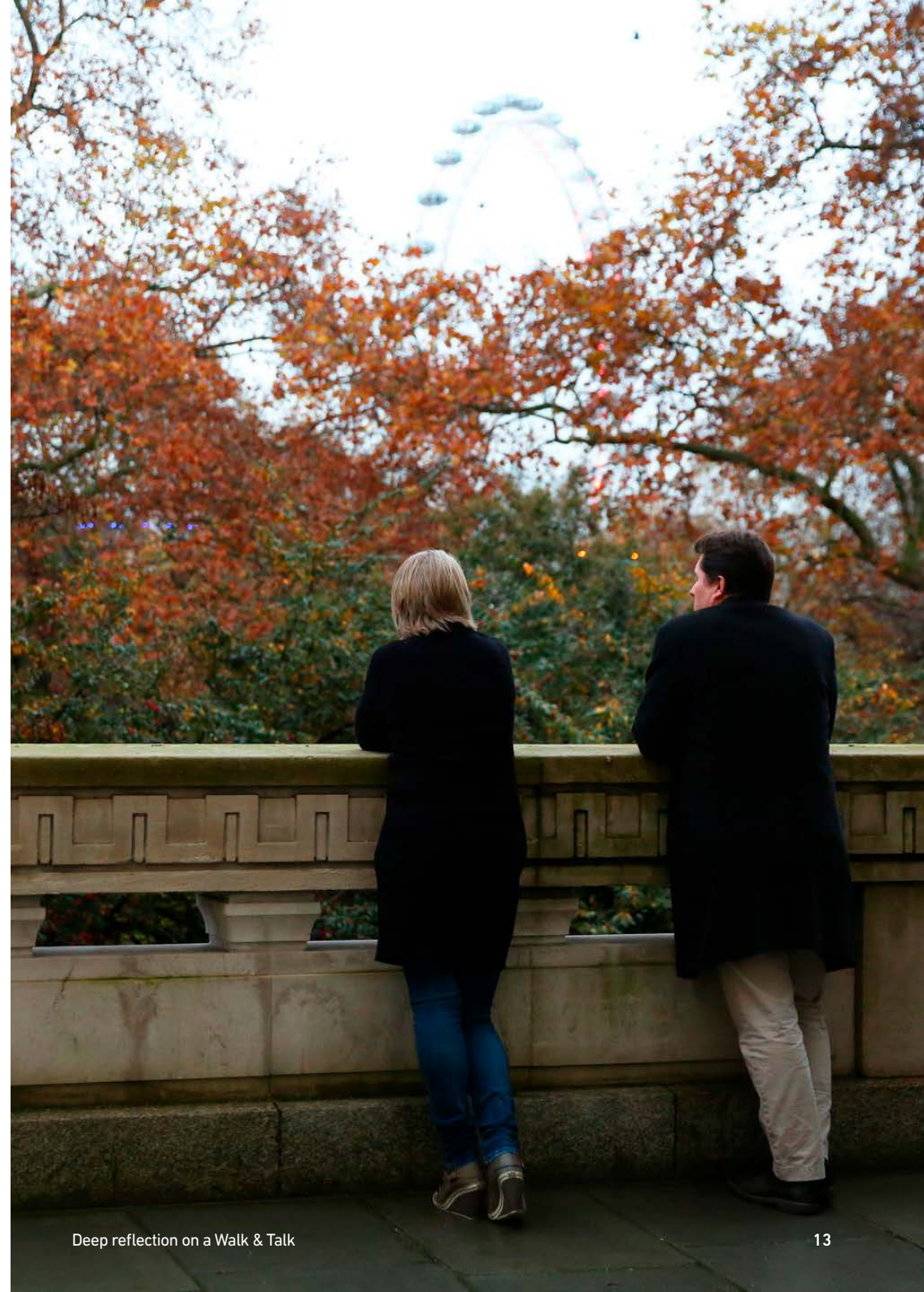
PROGRAMMES

Inspiring change through deeper listening

“One of the techniques we had been using within the Forward Institute was ‘Walk & Talks’. We would walk and talk with a Fellow or listen to a podcast on a walk and then discuss it afterwards. This simple technique inspired the idea of pairing our women officers with women who lived locally to have a conversation and hear first-hand from them what it’s like to live where we police. There was no set agenda beyond listening.

Hearing and seeing those areas where women felt unsafe. Our women officers were able to share their own reality of working in the Met – whilst problem-solving to improve safety for the local people we serve.”




COLIN WINGROVE,
Metropolitan Police Service



AREAS OF GROWTH

Our coalition wheel 2021/22



-  We are starting to explore issues of responsible leadership in big pharma, with new Fellows from GlaxoSmithKlein and AstraZeneca
-  We are partnering with a growing number of social action organisations
-  We've grown our work with the Met police to now include several new counties, including Devon and Cornwall, Greater Manchester and Merseyside

NPS SCORES

NPS scores across our events

Our NPS scores were gathered in our after event surveys and calculated with those that gave a score of 9 or 10 being seen as our 'promoters' and those that gave a score of 1-6 being 'detractors'



for 2020 - 21 our events were classed as 'good' by NPS metrics



for 2021 - 22 our events were classed as 'great' by NPS metrics

THE FELLOWSHIP

For our Fellows the journey to building responsible leadership doesn't stop once they've been through our programmes. In providing continued support to our 500+ strong community of senior leaders we aim to :

- ▶ Inspire and support them to continue to make long-term sustained change
- ▶ Provoke and influence them to engage with societal issues that really matter for responsible leadership
- ▶ Foster relationships and collaborate with others across sectors

We continue to share Stories of Change amongst the Fellowship to highlight not just 'what' Fellows are changing, but 'how' they go about it.

Looking at problems and solutions from different perspectives give leaders confidence to act, and to hold themselves accountable to deliver.



Collective Change Initiative

This year we ran our second Collective Change Initiative for 47 Fellows. The 6-month initiative provided Fellows with a guided systems approach on how to make change, to help them take action. We provided bespoke support to connect Fellows with tools, each other and external experts in their area of change.

Stories of Change

This has resulted in Wakefield Council's (see page 9), collaboration between the Scottish Health Workforce, a government agency and a high street banking organisation to improve diversity and inclusion, and Fellows' shared engagement on issues including climate action, sustainability and regional inequality. We've also launched a collective change initiative addressing the cost-of living crisis.

84%

of those who participated in the initiative told us they would recommend it to others.

THE FELLOWSHIP

"Working on my change initiative has allowed me to delve into my own experiences, reflecting deeply on the inequities I experienced and the impact these had on me as a person. Professionally, I have been able to see more clearly what needs to be done both within and outside my own circle of influence and I have had the courage to do it - and do it for the good of all."

HENRIETTA DAYO-SOMEFUN

Director, Barclays Risk, Finance & Treasury Technology



Fellows in discussion on residential at the Royal Military Academy Sandhurst

THE FELLOWSHIP



Engagement with societal issues

We aim to heighten Fellows' awareness and understanding of responsible leadership issues by organising Discovery Sessions where Fellows meet a broad cross-section of thought leaders who are actively grappling with responsible leadership in practice.

Topics included

- ▶ Responding to topical issues such as COP26
- ▶ Engaging with environmental concerns in dialogues with Natural England, and responsible customer engagement with EasyJet, central and local government
- ▶ Thinking long-term with the Future Generations Commissioner for Wales and exploring antimicrobial resistance with the Wellcome Trust

In 2021 we ran 22 Discovery Sessions with 191 Fellows participating, some in more than one session, and many Fellows taking up issues thereafter in their organisations. For example after a session on the employer's role in supporting menopause one Fellow asked their organisation what they were doing and in the absence of support set up a system of male allyship.

Fellowship Forum

In 2021 we held 3 Forums to reconnect Fellows and explore responsible leadership issues.

- ▶ In April 2021 with over 100 Fellows we explored food and responsible leadership (with Henry Dimbleby, Dave Lewis, former CEO of Tesco, Tamara Finkelstein, Permanent Secretary in Defra and Sarah Mukherjee, former BBC environment correspondent)
- ▶ In July, with 70 participants in our second Forum we looked at the role of anthropology and bringing diverse perspectives into leadership (with Gillian Tett, Editor-at-Large for the Financial Times (US))
- ▶ In September 2021 we held an in-person event with 80 leaders on Imagining a Better Future, including thinking about the future of the care sector with Madeleine Bunting.

We also issue a regular newsletter – reaching an open rate of

62.6%

which is ahead of the current benchmarks for non-profit (26.6%) and education email campaigns (28.5 %).

THE FELLOWSHIP

Convening and collaboration

On 1 March 2021, in conjunction with the Metropolitan Police Service, Barclays Bank and the Home Office, we convened leaders from 35 public, private and social sector organisations, as well as the Domestic Abuse Commissioner and the Assistant Commissioner of the Met Police Service, to raise awareness about domestic abuse and discuss what more they can do to support the 2.3m adult victims, equivalent to 6% of the population, per year (and an economic cost of around £66 billion). As a result of the session a Fellow decided to make hotels in his organisations refuges for those affected by domestic abuse.

Just under a year later we re-convened the same organisations to focus on two gaps: victim support and economic abuse, sharing examples of good practice from Boots and Lloyds Banking Group. Leaders have taken up these issues and organised awareness raising sessions in their organisation.

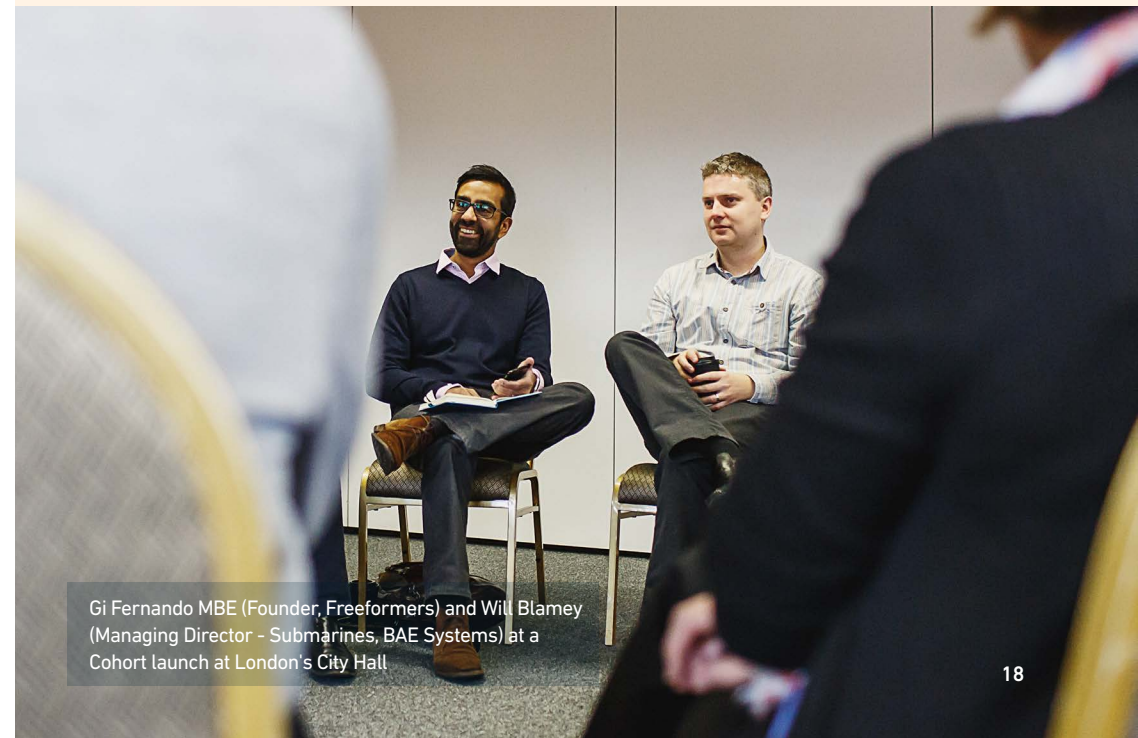
See links on latest news:
www.forward.institute/latest-news



Future Plans

We've started to bring Fellows together within our partner organisations across Cohorts to drive long- term change and this is an area we will continue to prioritise in our 2022-25 Strategy.

We also aim to provide more targeted support for Fellows who are making a difference.



Gi Fernando MBE (Founder, Freeformers) and Will Blamey (Managing Director - Submarines, BAE Systems) at a Cohort launch at London's City Hall

THE EXCHANGE



The Exchange Programme is an experiential 6-month programme centred around cross-sector leadership exchanges, offering a mirror held up to leadership, and a window into the realities of a peer's world.

The programme delivers

- ▶ Two Leadership Exchanges with senior leaders from different organisations and sectors
- ▶ Three workshops that bring together the full cohort to deepen skills and experience in the tools and practices of Responsible Leadership
- ▶ A diverse network of leaders from the private, public and social sectors
- ▶ A deep dive into the power of different perspectives and how they lead to better decision making and more responsible leadership



Over the past 12 months we have doubled the size of our delivery, working with 90 leaders in 2021. Since starting the programme, we have worked with 11 cohorts, reaching 229 senior leaders across 52 organisations.

Impact

Participants have consistently reported back that the leadership exchanges are hugely powerful and transformative experiences that have unlocked meaningful development. The workshops receive consistently positive feedback and participants have actively taken the tools and exercises back to their teams and organisations. We know from participants that it is a safe space for leaders to examine their leadership, get feedback from peers and deepen their networks and skills.

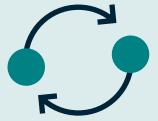
Areas of Improvement

- ▶ 2021 saw a period of significant growth in both the number of participants and across the Exchange Programme Team
- ▶ We have been reviewing the programme content, speaking to a wide range of stakeholders, to inform the next phase of programme development
- ▶ We want to work with a wider range of organisations to deepen the diversity of the cohort – reaching new kinds of organisations, leaders and sectors

THE EXCHANGE

Future Direction of Travel

- ▶ We are developing new content, working with key advisors and senior leaders in some of the UK's most influential companies, to build an even deeper focus on the power of diverse networks to drive better decision making and more responsible practice
- ▶ We are forging new partnerships to reach into new sectors and industries to continue to diversify our cohorts and bring new perspectives to the discussion
- ▶ We will continue to grow the programme increasing to 140 participants by 2024/25 as we work towards scaling the programme for greater reach and impact



By 2024/25 we will be working with

140 PARTICIPANTS

and preparing to scale for future growth, reaching into new sectors and industries



Fellowship residential, Manchester

THE EXCHANGE



Diary of an Exchange Fellow

Kim Morris, Director, Lloyds Banking Group

What a fascinating 6-month journey this has been. Having the opportunity to partner with 2 fantastic individuals who work in very different organisations and industries, with many similarities but also some fascinating differences. It's been a brilliant reminder of how beneficial it is to get feedback and insight from those totally independent and without agenda.

This programme has been an invaluable experience, giving me a strong sense of personal growth. I've reflected on my learning from the programme, and take forward three areas for progress

1 Building an inclusive and diverse workforce

One of my Exchange Partners works in a global organisation that crosses geographical and cultural boundaries, creating a more diverse workforce with conscious consideration of cultural differences in different countries.

By contrast, my other Exchange Partner's organisation is steeped in history, with strong values. They are on a journey of inclusion and diversity that felt more similar to my organisation. It helped me reflect on how big a journey lies ahead, which will need continued focus, more courage, brave conversations and action.

2 Capability development

It can be unhelpful to keep colleagues in the same role for too long. In one partner's organisation, employees move on to fresh roles in clearly demarcated timeframes. I compare this approach with my workplace, where one of my colleagues has done the same role for nearly 30 years. I understand better now how change can be unsettling and can create ambiguity for those not used to it.

There is a shared responsibility between colleague and organisation to deliver better support for transitions, clearer views on skills developed in-house and effective recruitment for specialist skills required. We need greater focus on creating psychological safety and preparation for change.

3 Unlocking potential through connecting to purpose

In both Exchanges, I observed great passion and care for the work being done and the interactions with colleagues. It made me reflect on my own individual purpose, that of my organisation, and my own teams.

During the pandemic there has been a monumental effort by our colleagues to support our customers and each other during these challenging times. How do we 'bottle' this when life becomes more normal? One of the tools that I discovered through the Forward Institute which I took back to my team to help try and capture some of this was the Culture Web, which equips us to understand and shape our organisational culture. This tool was so timely both because of the organisation's re-connection to purpose but also because in my role I was bringing two teams together into one – and this meant joining up two cultures. I was able to use the Culture Web tool with my team to think about the culture we wanted to create. It gave us a language and a structure to move past the intangibility of culture to actionable ideas that united and inspired us.

At the outset of this programme I described my dilemma as not being sure how to drive greater innovation and curiosity in a traditional, bureaucratic organisation and was seeking help with how to unlock potential. I still think this is part of my dilemma but The Exchange has definitely enhanced the direction of my work. The suite of new resources now at my disposal has really propelled me forward on my leadership journey.

LEADING THROUGH DISRUPTION



Leading Through Disruption is a highly bespoke 6 month programme for board level directors who

- ▶ Want to think hard about their purpose and are committed to building organisations that are beacons of purpose and responsibility
- ▶ Are willing to be honest, learn from others and share generously with the group. All discussions are private and off the record
- ▶ Are on the ExCo of a FTSE 100 company or major public body OR are a CEO or founder of an influential smaller organisation or fast growing disruptive company

So far, we've worked with 24 senior leaders, from across the private, public and social sectors. The senior leaders are highly engaged ExCo members, working in small peer groups so they can support and challenge each other on the realities of leading responsibly.



During the programme, the senior leaders have been introduced to Change Makers from 8 community focussed organisations, including Contact Theatre, Support When it Matters, Refugee Education UK and Debt Free London. These introductions succeeded in broadening the group discussions and allowing the senior leaders to think more deeply about the impact of their organisation on the wider system. A number of follow up conversations and partnerships have also been had as a result of the initial introductions.

The senior leaders also completed Leadership Exchanges during the programme, which enabled them to reflect on their own leadership and allowed them to reconsider their individual approach to leadership within their organisations.

Beyond the initial programme, relationships amongst the senior leaders and with the Forward Institute have continued to develop. There have been numerous informal events and formal roundtable events held with Nick Hampton, CEO of Tate & Lyle, and Professor Veronica Hope Hailey, Professor Emeritus from the University of Bath.

LEADING THROUGH DISRUPTION

The Leading Through Disruption programme enables leaders to make responsible decisions.

The programme allows them to apply a responsibility lens to the decisions they're making now and for the long term. The monthly small group sessions give them a space, amongst their peers, to reflect on the ultimate purpose of their organisations and their leadership.

The current focus for the groups is on three main areas:

- ▶ Energy and the climate crisis
- ▶ The cost of living challenge
- ▶ Navigating rapid changes in the political and economic environment

Future plans

To continue to work closely with each member of the growing LTD community, making connections between those senior leaders on the programme and others in their organisations who are also interacting with the Forward Institute

To make a greater cumulative and collective impact, with the growing group of senior leaders who have been through the programme.

Impact

24 senior leaders from 17 different organisations

"I've gained a network of people I trust and value in sectors very different to mine"

"I've found that talking to people outside of my workplace, who share some common challenges, has helped me be more courageous in my work"

"This job can be lonely, I didn't realise how much I needed this group"

"Brilliance comes from giving yourself space to think and do things differently"

"It's been a great wakeup call"

"My responsibility to my organisation is to do more of this"

"I'm incredibly grateful for this opportunity, I've loved every minute"

I've realised my problems are smaller than I thought and I need to get out more"

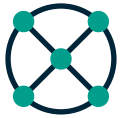
"I've realised that I think I'm clever but bits of my brain haven't worked hard enough, they really needed this"

"I've found a group of other leaders with positive intent; the challenge and the support of that group has been so powerful"

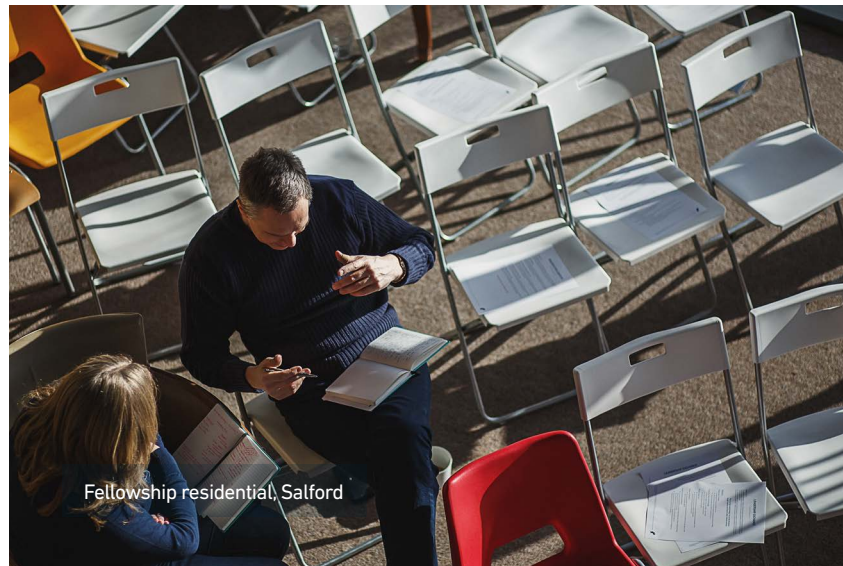


ORGANISATIONAL CHANGE

ORGANISATIONAL CHANGE



The organisational change team was established in response to requests from our Fellows to take what they have learnt on the programme and embed it within their organisations. We work with a handful of our partner organisations at any one time, via bespoke engagements to support them to become exemplars of purpose and responsibility.



Fellowship residential, Salford

Over the past 12 months, we have continued to work deeply with 5 of our partners - with their FI Fellows, their executive and extended leadership teams. Our work this year includes:

- ▶ Design partners for bespoke senior leadership development programmes for national healthcare providers
- ▶ Development of Leadership Frameworks, sustainability strategies and EDI strategies for charities
- ▶ Design and delivery of speaker series, proving external provocation on topical issues facing senior leaders
- ▶ Design and support for an off-site strategy development week for a multinational energy company
- ▶ Delivery of in-house community connections programmes to help leaders understand how community leaders have achieved change with resource constraints

This work has been conducted drawing upon the energy of Fellows, the practices of responsible leadership and the principles and methodologies of driving change in a complex system.



ORGANISATIONAL CHANGE

AADP case study

The AADP is the Army's development programme for those Officers and Civil Servants who have been identified as having the energy, intellect and acumen to excel and have the potential for senior leadership positions.

The aim of the AADP is to develop a high-calibre cohort who are connected, invigorated, openly enquiring and committed to the Army. Possessing first rate analytical skills and a capacity for novel thought, this group of officers and civilian staff are readily able to lead, conceptualise and apply their professional knowledge alongside advanced business techniques to solve significantly complex problems and deliver outcomes within the most demanding military environments and more widely.

AADP is at the centre of Army HQ business, and is a unique opportunity to influence the shape of the Army for the future. Teaching people to think differently, act more responsibly and more reflectively is not easy nor it is done by many organisations. AADP participants are the changemakers of the future: this training ensures that inclusivity is at the forefront of their thinking and that they fully embrace the principles of responsible leadership as they progress to command and senior staff positions.



Fellowship Forum, London



AADP training session, London

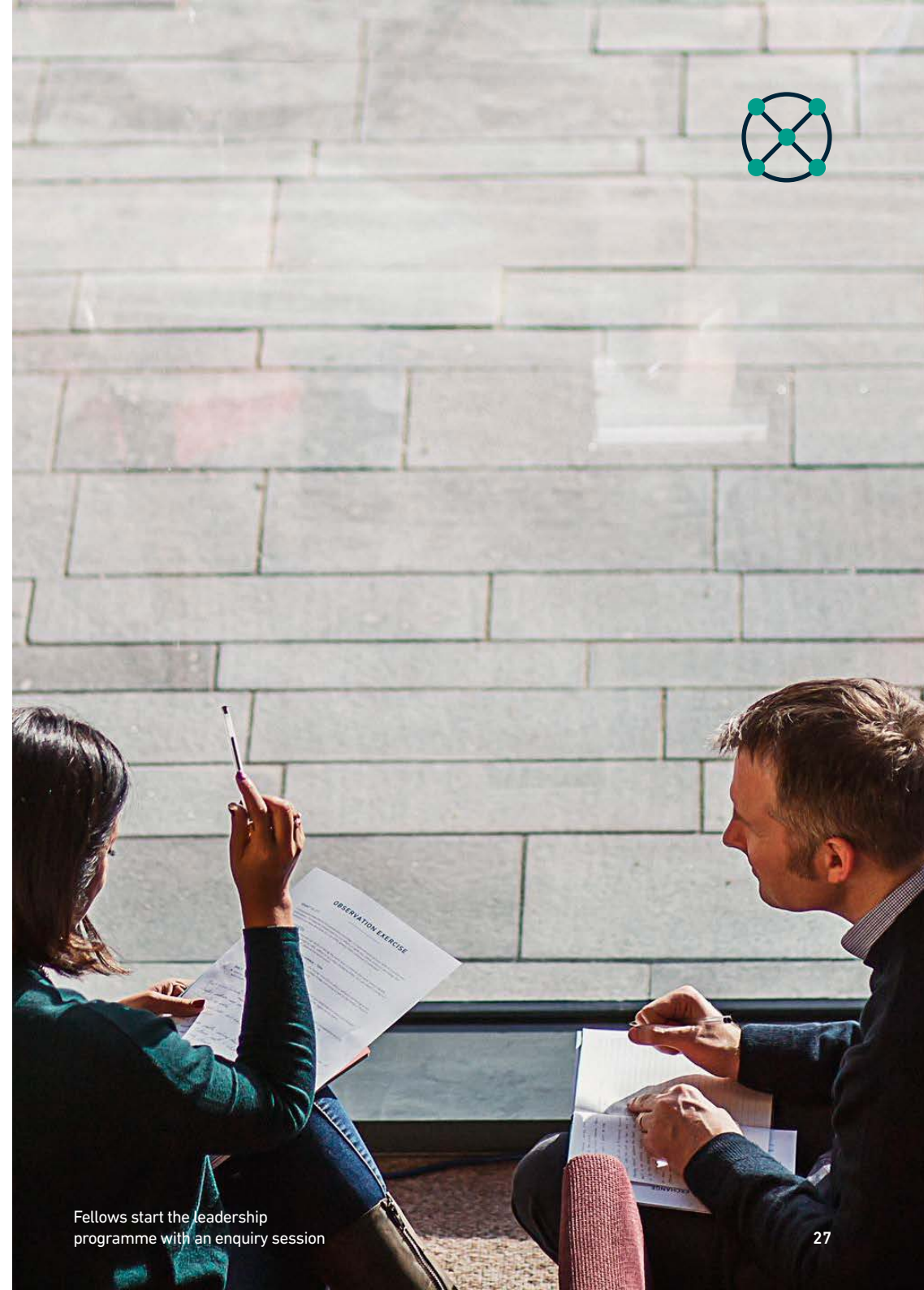
ORGANISATIONAL CHANGE

Lloyds Banking Group case study

In 2020 we began working closely with the leadership development team at Lloyds Banking Group, walking alongside them as thought partners in their approach to their senior leadership development offering.

Through a periodic series of workshops with the core design team, key stakeholders and target participants, we have held space to reflect on the overall leadership experience Lloyds Banking Group want to create and were invited to hold them to account in ensuring a thread of responsible leadership ran through the programme.

Opportunities to bring in more diverse voices, external provocation and learning from other sectors and leadership experiences led us to support their Speaker Series and to co-create an in-house Community Connections programme.



ORGANISATIONAL CHANGE COMMUNITY CONNECTIONS

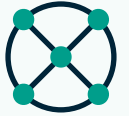
Working with our partner organisation, we co-designed, piloted and have gone on to deliver 4 cohorts of an in-house Community Connections programme. The purpose of the programme is to provide inspiration, stimulation and provocative, fresh, emotionally resonant perspectives on purpose-led leadership and provide a reaffirmation of the power and resources executives already hold.

Participants engage with three evening experiences, where we create the conditions for very different, authentic and intimate conversations with inspiring leaders in the community who share their stories of change, driven by purpose and achieved in spite of resource and power constraints.

The programme invites diverse community guests, to share perspectives and the lived experiences of under represented groups and engage in two way dialogue with senior leaders.



ORGANISATIONAL CHANGE COMMUNITY CONNECTIONS



To improve how we evaluate our programmes and how we conceptualise impact. We are:

- ▶ Capturing more robust and standardised survey data of both our community guests and participants to build a better understanding of the diversity we are engaging through this work
- ▶ Resuming some in-person community dinners, offering a blend of virtual and in-person experiences
- ▶ Offering bespoke 1-to-1 calls with executives after the impact session to help sustain momentum after the programme finishes

We worked with

66 SENIOR LEADERS

across 4 cohorts of the programme

100% OF LEADERS

from cohorts 1-3 either strongly agreed or agreed that the experience had strengthened a commitment to embedding more responsible leadership practices, including:

- ▶ Reminded them to actively seek diverse and divergent viewpoints when making decisions
- ▶ Highlighted the importance of stepping back and reflecting as an individual and encouraging others to do the same
- ▶ Challenged them to be braver and willing to walk towards problems, even though they may make mistakes along the way



POLICY & RESEARCH

POLICY & RESEARCH

Our goal is to position the FI as the leading voice on responsible leadership – translating research into practical guidance for industry and convening to influence the investment, regulatory and educational landscape.

Through our partnership with Oxford University, we will activate the findings of Oxford Character Project (OCP), a 3-year initiative that aims to examine character, values and responsible leadership.

We will do this through convening dialogues and cross-pollinating ideas from the OCP research into business environments.

Our research will support FI's ambitions for expansion in technology and creative and cultural industries, through producing original research interrogating the challenges of leadership in tech businesses, in collaboration with university partners and UK tech leaders and influencers. We will also seek partnerships within the creative and cultural sector to develop research that draws out the differences and synergies to be had from adopting creative leadership styles into non-creative businesses.

“Our goal is to influence the Conversation: influence others so that responsibility is front and centre of how leaders are developed everywhere, by sharing learning and helping to shape the wider system”.

AMANDA PARKER,

Director, Policy, Research & Communications

From 2022 - 2025, we hope to:

- ▶ Build FI's following on social media to 2500 people
- ▶ Have shared and worked up policy - informed by FI research - in 20 workshops and/or across 50 HR leaders

POLICY & RESEARCH RESEARCH PUBLISHED 2021/22

Responsible business through crisis

Insight from senior leaders on how they have maintained trust and resilience during the Covid-19 pandemic.



[View full report](#)



"Responsible business has been steadily climbing up the agenda, driven by growing investor and regulatory interest in responsibility and sustainability, and an organisational focus on values and purpose. A shift in business practices is needed to ensure work is a force for good, and the CIPD calls for businesses to balance all stakeholders' needs and ensure employees benefit from the value created in our workplaces. The research conducted by our UK colleagues tells the story of responsible business and trustworthy leadership through the peak and the aftermath of the COVID-19 pandemic.

It gathers the perspectives of more than 80 senior leaders, including HR directors, across organisations that include FTSE 100 companies, large local authorities and household names. Through their candid reflections, we offer a unique insight into leading an organisation during both phases of the crisis and key learnings to consider to become a responsible business and embed cultures of trust."

Written by

VERONICA HOPE HAILEY,

Emeritus Professor, University of Bath, Director of Policy and Research, Forward Institute, FAcSS, MCIPD,

DR SCARLETT BROWN,

Policy Consultant at the CIPD and Research Lead at Board Intelligence.

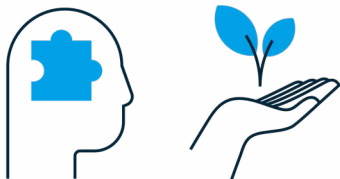
POLICY & RESEARCH RESEARCH PUBLISHED 2021/22

A Founder's Reflection – Adam Grodecki

A Founder's Reflection



[View full report](#)



“In the last six years the Forward Institute has grown from a curious hybrid – simultaneously a scrappy start-up and a coalition formed by the leaders of some of the UK’s most significant organisations – into an influential and innovative non-profit. More than 500+ leaders from organisations such as the Army, Bank of England, Tesco, Barclays, BP and easyJet have gone through its 18-month responsible leadership Fellowship programme. It works with their chief executives in peer groups to support and challenge, and brings together senior leaders with community activists to learn from each other. The Institute declines to ‘teach ethics’, instead putting people through experiences that ask them to walk towards dilemmas and seemingly intractable problems; and helping them form long-term relationships with people from different sectors and perspectives.

But how does an organisation dedicated to ‘responsible leadership’ define such a woolly concept? Professor Veronica Hope Hailey, former Dean of the School of Management and Vice President of Bath University, interviewed Adam Grodecki, its founder...”

Written by

VERONICA HOPE HAILEY,

Emeritus Professor, University of Bath, Director of Policy and Research, Forward Institute, FAcSS, MCIPD,



GOVERNANCE & TEAM

GOVERNANCE

Our proactive and dedicated board provides governance, stimulus, challenge and reflection to our work as a non-profit organisation. The Institute is also supported by our faculty members, a cross-sector group of experts who provide operational and strategic steer to our ambitions. Our work is supported by facilitators, associates and advisors whose expertise span a wide range of disciplines.

B Corp

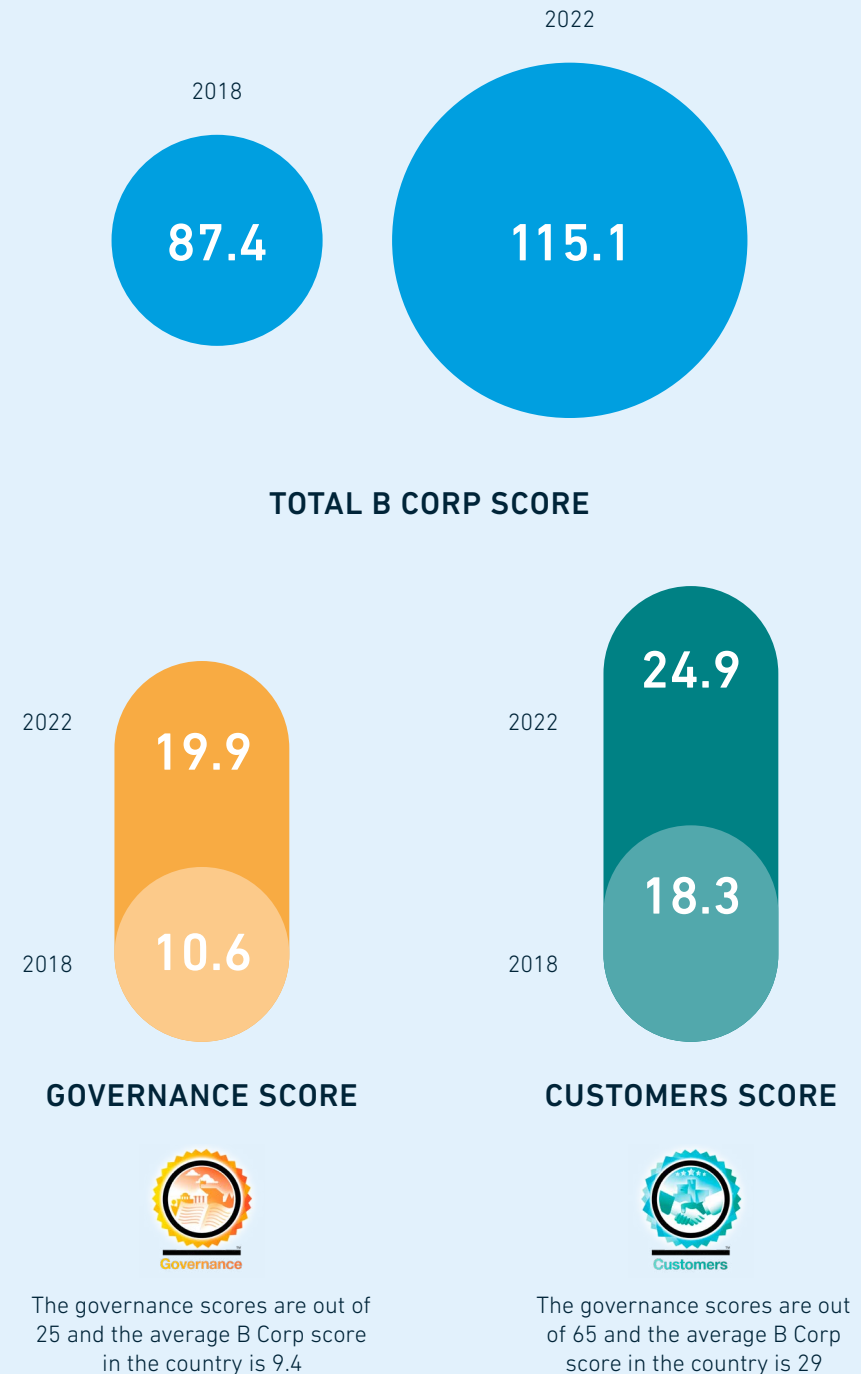
B Corps share a purpose - to harness the power of business for good. As an organisation that seeks to spread responsible leadership practices, becoming a B Corp allows us to uphold this core purpose within our own organisation.

In 2018, we gained B Corp status, joining a rapidly growing global movement of companies committed to doing business responsibly. We are thrilled to recertify with a significant leap in score from 87.4 to 115.1, and again have been named 'Best for the world' for our Workers. Improvements in our environment score result from our proactive approach to improving environmental impact, embedding sustainability at the heart of each pillar of our work. Our sustainability working group continues to consider ways to accelerate our commitments.

We are in a privileged position to be able to influence our partner organisations, wanting to ensure we use this influence in the best way possible. We will continue to use our B Corp assessment as a guide for how we can improve and keep ourselves accountable.

JESS DENNIS,

Director of Finance, People & Operations, & B Corp Officer



TEAM

Our team is our greatest resource: we know that the way people are treated has an impact that lasts far beyond working hours.

This is why we're so proud to have been honoured as a 'best in the world' B Corp in the workers category with a top 5% score'.

The Best For The World B Corps in the Workers impact area defined by B Corp as having achieved a top 5% score by putting in place exemplary employee-friendly practices, such as ownership opportunities, job flexibility, and fair-chance hiring policies.

Our scores below on a scale of 0-50 are ranked above the median score for our country of 22.

2019 Score: 36.9

2022 Score: 37.9



Wellbeing and cost of living

We're committed to reducing inequalities and supporting our staff with financial security regardless of paygrade. We are a London Living Wage Employer for staff and interns.

Gender Equality

We've received top marks in our policies for primary and secondary caregivers, making the FI an attractive place to work for all care givers.

Learning and Development

We aim to foster a sense of curiosity, self-reflection and a thirst for learning. We have our responsible leadership library, regular training sessions, and a generous, personal training budget for every member of staff. This continues to be a priority for our staff development.

We also believe in high-quality, honest feedback, in all directions. Our in-depth annual survey is shared in full with all staff, and ask staff how well we live our principles and practices. Our highest scores are in the categories 'care more' and 'work generously'. 94% of the team agree/strongly agree that they are happy working with us and are proud to be part of the FI.

Staff Retention

We have strong retention rates – with 11 staff joining in 2021/2 and just 2 leaving.

PEOPLE OPERATIONS

Fulfilling last year's commitments

- ▶ Last year we committed to implement a number of new policies including Modern Slavery and a Supplier Code of Conduct which all new starters now have to sign and all staff sign annually. We are committed to reviewing our supplier lists according to these policies too, improving upon them year on year
- ▶ We've brought in a number of regular team activities including team days, socials, weekly policy sharing and a 'thank you' box to increase information sharing and positive feedback

Areas of improvement

- ▶ We reviewed and enhanced our internal recruitment process by reviewing the language and style of job specs, expanding our choice of advertisers and separating the interview & task process to minimise bias through the recruitment process
- ▶ We've Improved the diversity of our board

Future direction of travel

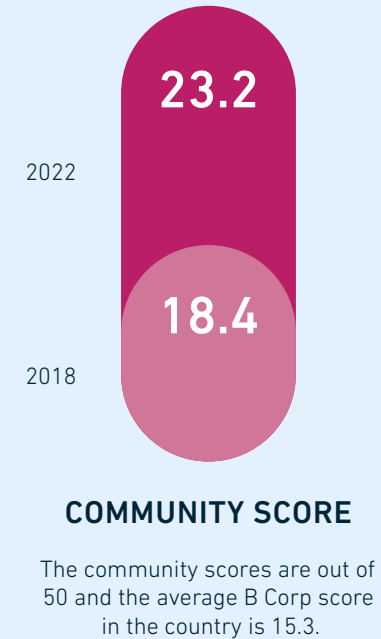
- ▶ We will continue to improve our recruitment practices to ensure we continue to improve the diversity of our team
- ▶ We are introducing pulse surveys through the year alongside our annual team survey to ensure we track and take action on the views of our team throughout the year
- ▶ We are growing our operations team to support the wider team better as we grow the FI
- ▶ We will improve our internal processes to ensure we are providing as effective a work environment as possible for our team
- ▶ We will continue to consider ways to provide support for our team through the cost-of-living crisis, as well as bringing more visibility to the benefits that we already provide

COMMUNITY

Our volunteering policy means staff can take up to 5 days a year to volunteer with a charity of their choice. Organisations we have volunteered with include Waterloo City Farm and Doorstep Library.

Our Community Connections Initiative brings these Community hosts closer to our work. Hosts have included Harrow Samaritans, We Belong, Mr Moneyjar and Dayrise.

By the end of 2022 we will bring our community leaders together to share their reflections from working with us and thank them for their valuable contributions.



Community Connections dinner at Waterloo City Farm

ENVIRONMENT

Our events have considerable environmental impact.

By planning our events through the lens of environmental sustainability, closely tracking attendees to reduce waste, carefully selecting sustainable suppliers and event venues, and working with them to adopt our approach, we promote sustainable behaviours and reduce waste and pollution.

We offset our carbon annually through [OurCarbon](#). We support The Gold Standard accredited offsetting scheme and purchase Gold Standard offsets.

We offset more than our emissions each year to reach net zero, purchasing beyond the emissions we are practically able to measure.

We view carbon offsetting as the last step in a mitigation hierarchy of avoid, reduce and offset, and are committed to regularly evaluating how to avoid and reduce our impact.



ENVIRONMENT SCORE

The environment scores are out of 20 and the average B Corp score in the country is 4.9.

We are delighted to have nearly tripled our score in the environment area, as this was an area of impact we wanted to improve since our last certification.



SUPPORTING INCLUSION

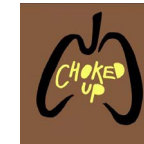
We are partnering with a growing number of social impact partners



SUPPORTING EQUITY

Our charitable donations

£15,441.85



GLOSSARY

Forward Institute - Principles



Be brave



Be honest



Care more



Value diversity



Think for the long-term

Forward Institute - Practices



Observe & listen



Reflect more



Work generously



Take action

B Corp Badges



Programmes



Fellowship



Leading Through Disruption



Exchange



Policy & Research

FORWARD
INSTITUTE

IMPACT REPORT

2021/22

Registered as Responsible
Leadership Foundation Limited
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London, WC2A 1HP

