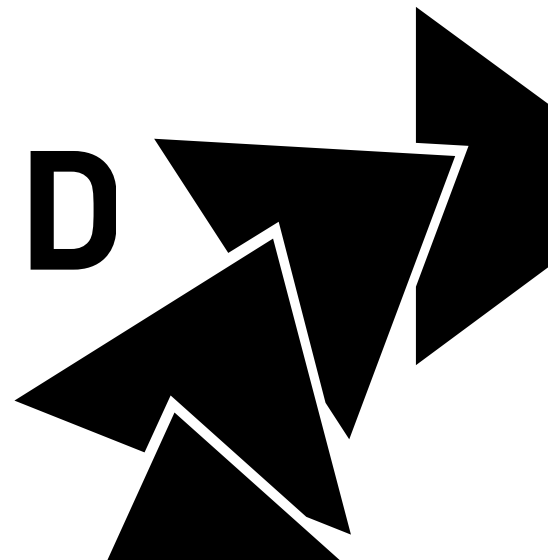


**FORWARD**  
INSTITUTE





▶ The truth won't set us free  
- until we develop the skills,  
the habit, the talent and the  
moral courage to use it. ◀

**Margaret Heffernan**  
Forward Institute

Fellows on launch day, 2015

# WHO WE ARE

The Forward Institute was set up by a small group of major organisations to help the next generation of leaders meet the complex challenges facing business and society.

In 2014, supported by The Boston Consulting Group, we came together as a cross-sector coalition to commit to a commercially rigorous exploration of responsible leadership and to find new ways to embed these principles in our future leaders.

Each year we work with 25 significant organisations to select a diverse cohort of 60 accomplished leaders from the public, private and social sectors to join our distinctive 18-month Fellowship programme.

Our focus is on institutional, not just individual, impact.

## OUR FOUNDING ORGANISATIONS





# THE CHALLENGE

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Systemic challenges are placing significant pressure on leaders. Yet the way we develop our leaders has failed to evolve sufficiently. Never has so much been invested in leadership development, yet the gulf between the public and institutions continues to grow. New capabilities are needed to succeed.

## PROFOUND CHANGE, DECLINING TRUST

The world is changing rapidly. Technological disruption, growing transparency, political instability, climate change, mass migration and changing employee expectations are challenging traditional assumptions and ways of working.

Public trust in capitalism and its institutions has been shaken. In the face of profound social and environmental challenges, organisations need to demonstrate a social licence to operate alongside traditional (often short-term) metrics of success. They increasingly face tough questions about how they choose to operate.

## INSULAR CULTURES

Recent reputational crises have exposed insular cultures that stifle innovation and enable corrosive norms to develop. Traditional career paths and the incentives to get ahead encourage people to become ever more inward looking and siloed.

The result can be a senior cadre who are technically brilliant but isolated from wider society and ill-equipped to meet the challenges and opportunities of the years ahead.



'Occupy London' protest outside St. Paul's, London

# OUR PURPOSE

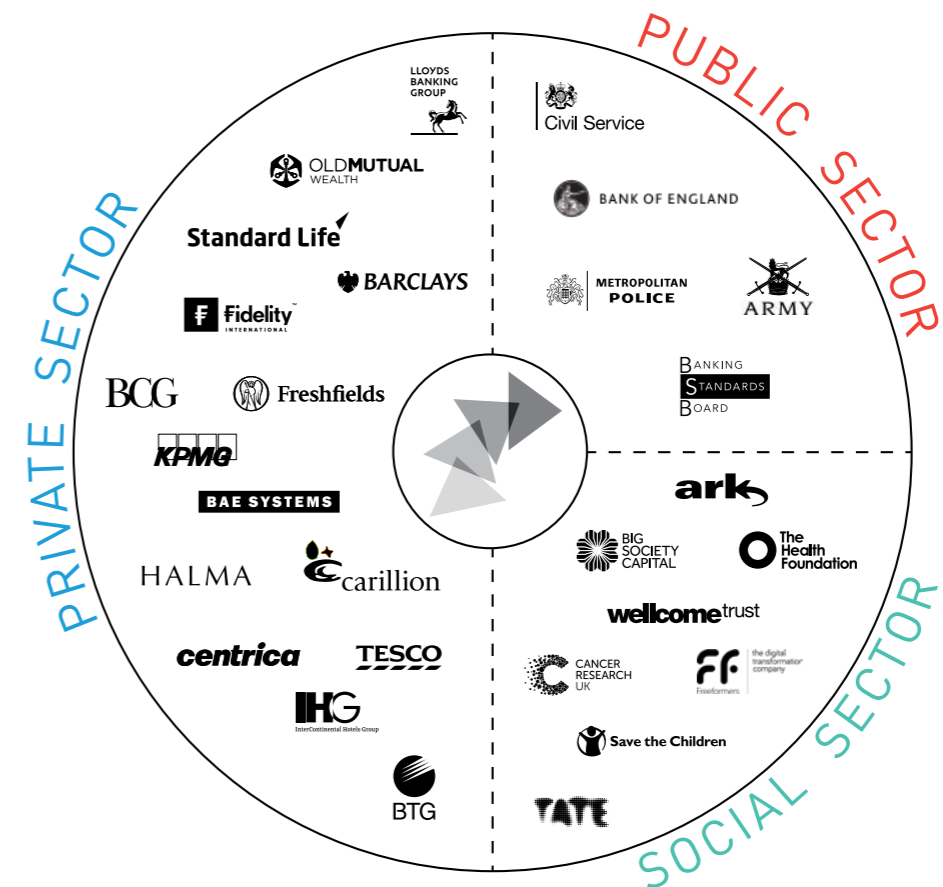
Our purpose is to create change within major institutions to help them act more responsibly. We do this by building and supporting a movement for responsible leadership within and across organisations.

We believe that to thrive in today's complex and evolving world, organisations must be outward looking, responsive and responsible. Our Fellowship programme supports the next generation of senior leaders to broaden their perspectives, explore their values and hone their leadership. We challenge and support them to make a real difference in their organisation.

We are a non-profit organisation and form part of the broader movement towards a fairer and more responsible society.



# OUR PARTNERS



We are not a third party training provider, but a coalition of major organisations facing shared challenges. The Forward Institute is an exercise in collaboration and experimentation between all involved.



# OUR FELLOWS

Each year we select a Cohort of 60 exceptional Fellows nominated by the CEOs of our partner organisations. Fellows are high-performing individuals viewed as potential future CEOs, CIOs, CFOs, COOs and CMOs. Many have recently taken on a significant new leadership role.

We aim to identify a small group of leaders from each partner - helping them to integrate principles of responsible business into the fabric of their organisation.

## OUR FELLOWS INCLUDE

### **Natalie Black**

Deputy Director - Policy Unit  
Prime Minister's Office

### **Karalee Close**

Partner & Managing Director  
The Boston Consulting Group

### **Michael Cockroft**

CFO - Europe  
InterContinental Hotels Group

### **Richard Copperthwaite**

CIO - Central Europe  
Tesco

### **Michael Docherty**

Director of Digital & Supporter Experience  
Cancer Research UK

### **Gi Fernando MBE**

Founder  
Freeformers

### **Kevin Fletcher**

Chief Economist & Director  
HMRC

### **Ranjani Kearsley**

Head of HR  
Fidelity International

### **Lubaina Manji**

Head of Rise & Group Innovation  
Barclays

### **Catherine Roper**

Chief Superintendent - Islington  
Metropolitan Police

### **Andy Morris**

Head of Digital & Marketing  
British Gas

### **Andrew Shapland**

Solutions Director  
Carillion

### **Ian Stevenson**

Managing Director - Naval Ships  
BAE Systems

### **Nick Thompson**

CEO  
Africa Governance Initiative

### **Hanlie van Staden**

Client Service Director  
Old Mutual Wealth

### **Emmajane Varley**

Head of Insight, Culture &  
CEO Comms, HSBC

### **Tina Yu**

Country Director - Malawi  
Save the Children

### **Martin Zhang**

Sector VP - Infrastructure Safety  
Halma



Gi Fernando, Freeformers

▶ The Forward Institute has been extraordinary. Never before in my professional life have I been exposed to such intellectual diversity. Therefore, it is unsurprising that my takeaways from the 18 months are numerous and varied.



**Rob Hedderwick**  
Commanding Officer  
3 SCOTS  
**British Army**

▶ My time on the Fellowship was a period of profound personal and professional change...a true catalyst to reassess what I am doing in my professional life and how I interact with others...it became apparent to me what a dearth of leadership there currently is, yet how much people crave strong leaders.



**Lauren Anderson**  
Head of EU Withdrawal  
**Bank of England**

▶ Having reawakened my passion and found a number of co-conspirators, my personal commitment is to continually seek opportunities to make a difference to the social diversity agenda within traditional city firms.



**Jon Bingham**  
Partner  
**KPMG**

▶ As a responsible leader I can no longer assume that someone else is dealing with these overwhelming challenges – as leaders of influential companies we need to stand up and take action



**Rosalind Ford**  
Transmission &  
Distribution Director  
**Carillion**



Fellows during a residential, 2015

# OUR APPROACH

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It's easy to agree we need more responsible leadership; harder to define and enact it. What responsible leadership looks like varies between organisations and over time. We believe moral choices are shaped by the interaction between our character, the company we keep, and the context in which we operate.

The programme examines:

- PERSONAL LEADERSHIP
- NETWORKS & COLLABORATION, SYSTEMS & COMPLEXITY
- MAJOR CHALLENGES FACING ORGANISATIONS & SOCIETY

Instead of a set curriculum, each programme is shaped and co-created with the cohort of Fellows, allowing content to respond to the challenges they are facing. Underpinning each programme is an exploration of underlying principles; that responsible leaders will be accountable, purposeful, open, fair, diverse, human, and think and act for the long-term.

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## LEARNING OBJECTIVES

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### HEIGHTENED RESPONSIBILITY

Deep conviction and understanding of the principles of responsible business and the ability to articulate a business case for them.

### BOLDER LEADERSHIP

Strengthened values, moral compass and sense of purpose. Mindset of experimentation and collaboration. Heightened courage and ability to lead innovation and change.

### BROADER PERSPECTIVES

A member of a diverse, collaborative and dynamic network; broader worldview - thinking beyond organisational boundaries and alert to emerging opportunities and challenges.

# THE PROGRAMME

18

MONTHS

3

RESIDENTIALS

1

LEADERSHIP EXCHANGE

20

FIELD VISITS & SEMINARS

1

CHANGE CHALLENGE

## INVESTIGATION

Self-reflection and preliminary investigation into responsibility within Fellows' own organisations.

INQUIRY  
2 Months

## LAUNCH

A full day of inspiration and provocation to welcome new Fellows.

**Hosted by:** Bank of England, Tate Modern, London's City Hall.

FOCUSED PROGRAMME  
12 Months

## RESIDENTIALS

Three residential retreats allow time to slow down, build relationships and engage with issues at a deeper level. Sessions include provocations from senior leaders, field visits to groundbreaking projects, structured exercises, community dinners and reflection time.

**Hosted by:** Wellcome Genome Campus, Royal Military Academy Sandhurst, City of Manchester.

EXPERIMENT  
6 Months

## DISCOVERY SESSIONS

Regular roundtables exploring critical issues. Hosted by our Advisory Board, CEOs and thought leaders. Discussions are probing and off-the-record.

EXPERIMENT  
6 Months

## THE FELLOWSHIP

An active programme of events allow Fellows to keep connected, inspired and collaborate across cohorts.

BEYOND THE PROGRAMME

## CHANGE CHALLENGE

Throughout the programme Fellows identify and work on an important issue within their organisation that requires responsible leadership.

## LEADERSHIP EXCHANGE

Paired Fellows spend two days observing each other in their respective organisations studying how responsibility and leadership is enacted.

## DISCUSSION GROUPS

Fellows navigate the programme in facilitated small groups. Meeting at residentials and between them.

## DISCUSSION GROUPS

Fellows focus on their Change Challenge with support and provocation from their Discussion Group in half-day sessions.

## CONCLUSION

The cohort share learning and celebrate. Fellows afterwards present back to their Executive Committee and colleagues at work.

**Hosted by:** Mansion House.



# RESPONSIBLE LEADERSHIP

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## ▶ ACCOUNTABLE

'Wilful blindness' is both a legal concept and the name of a book by our lead faculty, Margaret Heffernan. Through exercises and discussion, Fellows help each other consider their own areas of wilful blindness, and widen the scope of what they will take responsibility for.

## ▶ PURPOSEFUL

Fellows debate the dynamics of profit and purpose. Sessions including Mary Gentile's work on Giving Voice to Values help Fellows articulate their values, raise questions about ethics and tensions, and close the gap between aspirations and actions.

## ▶ LONG-TERM

By bringing together insights from different sectors and examining long-term societal trends and new technologies, Fellows explore the challenge of short-termism and the opportunities for systemic change.

## ▶ OPEN

Innovation theory and practical experimentation feature strongly. Fellows investigate the promise and risks of transparency and how to create a culture of candour – open to new ideas and challenge.

## ▶ DIVERSE

Increasing diversity of thought is a core theme. Connections across the Fellowship are mapped and developed during the programme and beyond. Fellows are exposed to different perspectives and socialise with people they wouldn't usually encounter. They are encouraged to build more diverse teams and networks.

## ▶ FAIR

Listening skills are honed, un-regarded voices heard, and the wider consequences of individual and organisational actions considered. Fellows are proactive in involving teams and wider stakeholders during their time on the programme.

## ▶ HUMAN

We consider hubris, humility, failure, friendship and fulfilment. Addressing the physical, mental and emotional aspects of work, the programme helps Fellows build their individual resilience and wellbeing and drive a more human, healthy and progressive workplace.







Laura Wallis, Bank of England

# WHAT MAKES US DIFFERENT?

## SENIOR SPONSORSHIP

Each organisation must have a senior sponsor to champion the work internally. Typically the CEO or COO. In addition, Fellows benefit from the direct guidance of our Advisory Board and other senior leaders.

## DIVERSE COMMUNITY

We bring together corporates, government, regulators, investors, professional and financial services, and NGOs. This mix exposes Fellows to different perspectives and allows them to build broader networks.

## ORGANISATIONAL FOCUS

Fellows are encouraged to disseminate new working practices and ideas; and to identify and tackle a Change Challenge within their organisation.

## PRACTICAL & EXPERIENTIAL LEARNING

Practical in approach. Experiential in design. Field visits, immersive sessions, and rapid and iterative experimentation help embed the Fellows' learning.

## VALUES-DRIVEN LEADERSHIP

We were set up to help tackle the gap between stated values and lived actions in organisations. The entire programme is an exploration into the principles and practices of responsible leadership.

# CREATING IMPACT

An integral part of the programme is for the Fellows to apply their learning within their organisations, undertaking experiments to explore different ways of doing things day-to-day.

Fellows also work on a 'Change Challenge' - an important issue they identify that requires responsible leadership. This is agreed between Fellows and their sponsor, ensuring the topic is strategically important for the organisation.

Change Challenges are primarily self-directed work. Time is given at all events for Fellows to develop new approaches and focus on leveraging the insight, experience and cross-sector network of our partner organisations.

Fellows are expected to spread their ideas inside their organisation - starting conversations and sharing techniques from the programme. Designed by our Faculty, we are building toolkits on core topics and key techniques so that ideas can be widely shared.

## PAST CHANGE CHALLENGES

### TECHNOLOGY & MENTAL HEALTH

Multiple organisations collaborating to assess the impact of technology on mental health and to develop interventions based on findings.

### TACKLING FOOD WASTE

Two large multi-nationals partnering with multiple social entrepreneurs to experiment with combining scale and agility in addressing the moral and commercial issue of food waste.

### PSYCHOLOGICAL SAFETY

Creating environments in which people feel able and energised to innovate, speak up and take risks in order to uncover areas of wilful blindness.



Helen Millichap, Metropolitan Police

▶ I have launched a major clinical leadership programme (2020) based on the Forward Institute that brings together clinicians and managers from across the NHS to develop a whole-system approach to healthcare delivery.



**Peter Bibawy**  
Medical Director  
Hampshire & Farnham CCG

▶ I've been using materials and tools from the programme in my own team meetings and across the organisation to support individual development and drive a different set of behaviours.



**Vicki Baker**  
Head of HR  
Old Mutual Wealth

▶ I have set up a year long leadership course for my own Battalion based on the programme. I will be pleased if it is even partly as effective as the Forward Institute has been!



**Rob Hedderwick**  
Commanding Officer  
3 SCOTS  
British Army

▶ We're aiming to prove (or disprove) a link between the rise of tech and mental ill health at work. Our survey of 15,000 people across 4 major organisations provides vital data to raise awareness and support subsequent stages of the project. This cross-sector investigation is only possible because the Fellowship brings organisations together to tackle common problems.



**James Neale**  
Managing Director  
Macro  
Barclays





# BEYOND THE PROGRAMME

We are building a movement for responsible leadership within and across organisations, so continuing to work closely with the Fellows after the programme is vital to our success.

## FELLOWSHIP

All Fellows from every cohort are brought together for an annual Forward Institute event - building a movement for responsible leadership. Meanwhile, Fellows are encouraged to continue to meet in their original Discussion Groups to support and challenge each other throughout their careers.

## COLLABORATION

Many Change Challenges continue and grow beyond the programme, with Fellows from each cohort joining each other's challenges, and recruiting colleagues to assist.

## INSPIRATION

We recognise the need for regular stimulus: our series of Discovery Sessions on aspects of responsible leadership is open to all Fellows regardless of cohort. Our monthly email provides news articles and questions for Fellows to debate and share with their teams.

## RESOURCES

Through our Creative Commons licensing agreement, Fellows can use Forward Institute exercises and materials with their teams to develop and share good practice.

## MENTORING & COACHING

Fellows mentor future Fellows, and can draw on the community of Forward Institute mentors and coaches.





## OUR ADVISORY BOARD & SPONSORS

**Sir Anthony Salz**  
Chair, Forward Institute

**Sir William Castell**  
Chair, Foundation for Future  
London

**Sir Ian Cheshire**  
Chair, Debenhams

**Katherine Garrett-Cox**  
Former CEO, Alliance Trust

**Professor Lynda Gratton**  
London Business School

**Andrew Hutchings**  
Partner, Freshfields

**Charlotte Hogg**  
Former Deputy Governor  
Bank of England

**Sam Laidlaw**  
Former CEO, Centrica

**Sir Richard Lambert**  
Chair, British Museum

**Jonathan Moulds**  
Philanthropist

**Robert Phillips**  
Co-Founder, Jericho Chambers

**Stuart Roden**  
Chair, Lansdowne Partners

**Sir John Rose**  
Former CEO, Rolls-Royce

**Daniela Barone Soares**  
Non-Exec Director, Halma

**Jasmine Whitbread**  
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Head of the British Army

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CEO, Banking Standards Board

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Director, Wellcome Trust

**Paul Feeney**  
CEO, Old Mutual Wealth

**Sir Jeremy Heywood**  
Cabinet Secretary  
Civil Service

**Tony Hoggett**  
COO, Tesco UK

**Katherine McLeland**  
Head of Investor Relations  
Barclays

**Rod Paris**  
CIO, Standard Life

**David Rhodes**  
Senior Partner, BCG

**Dominic Rossi**  
Global CIO, Fidelity International

**Janti Soeripto**  
COO, Save the Children

**Nigel Taylor**  
CEO, Carillion Services

**George Turner**  
EVP and General Counsel, IHG

**Charles Woodburn**  
COO, BAE Systems

## OUR FACULTY & FACILITATORS

### FACULTY

**Margaret Heffernan**  
Lead Faculty, Forward Institute;  
Entrepreneur & Author

**Professor Jonathan Gosling**  
Lead Faculty, Forward Institute;  
Emeritus Professor  
Exeter University

**Dr. Gabe Adams**  
Assistant Professor of  
Organisational Behavior  
London Business School

**Heather Bewers**  
Former Director of Innovation &  
Foresight, KPMG

**Dame Louise Casey**  
Director General, Casey Review  
Team, UK Government

**Professor Sir Cary Cooper**  
Head of Organisational Psychology  
University of Manchester

**Steven D'Souza**  
CEO & Founder, Deeper Learning

**Mary Gentile**  
Director, Giving Voice to Values

**Ed Gillespie**  
Co-Founder, Futerra Sustainability  
Communications

**Professor David Grayson**  
Director, Doughty School for  
Corporate Reputation, Cranfield

**Professor Veronica Hope Hailey**  
Dean of School of Management  
Bath University

**Geoff McDonald**  
Mental health campaigner  
Former Global VP HR, Unilever

**Lord Puttnam**  
Filmmaker & Educator

**Matthew Taylor**  
Chief Executive, RSA

### FACILITATORS

**Jane Drabble**  
Former Director of Education  
BBC

**Geraldine Haley**  
Former Global Head of Executive  
Talent, Standard Chartered Bank

**Andy Caldwell**  
Director, CoCreate Consultancy

**Bhanita Mistry-Russell**  
Founder, LAB-Innovation



**Margaret Heffernan**  
Forward Institute

▶ Leaders at all levels face an array of complex questions in a world that seems to be ever more complicated. It helps hugely to have friends to debate, support and challenge on the journey.

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