
Ramping Up for Distributed Leadership



A Brief Exploration of Two Cases

This case study is one in a series of five exploring the practice of distributed leadership. Commissioned by the Hewlett Foundation's Performing Arts Program, Open Mind Consulting and Informing Change describe the experiences and insights shared by seven organizations that demonstrate distributed leadership.

Introduction

The processes for distributing leadership provide opportunities for leaders at every level of an organization to decide how to use and allocate organizational resources—for example, time, money, and talent. Each organization distributes leadership in its own unique ways, influenced by different organizational histories, the processes they choose for distributing leadership, and the opportunities and challenges unique to their contexts. Through conversations with California Shakespeare Theater (Cal Shakes) and Terrain, we discovered different factors that shape and reshape how these two organizations ramp up to distributed leadership over time and to different degrees.

The factors that shape distributed leadership processes for these organizations fell into three categories:

Inflection Points: Organizations adopt distributed leadership processes at key inflection points and continue to adapt them as the organization evolves.

Timing: The particular moment when an organization initiates distributed leadership processes (e.g., changing their leadership culture after many years versus building on a tradition of distributing leadership) presents different opportunities and challenges.

Staff Hierarchy: Implementing distributed leadership processes often takes more time when many layers of authority already exist within an organization.

Snapshot: Terrain

Terrain was established in 2008 to reinforce artistic vitality in Spokane, WA by knitting together a community of artists and innovators across generations. From the start, Terrain was a collaborative endeavor. Founding members relied on work groups and volunteer committees to carry out the organization's work: offering gallery space to local artists, developing affordable event venues, and running a storefront business featuring the work of local artists. Nevertheless, as Terrain began to expand its offerings and role in the community, board members and many of the early founding artists identified a need for increased oversight of day-to-day activities while still remaining committed to their grassroots beginnings. Formalizing distributed leadership processes felt like the

Terrain: Factors Influencing Distributed Leadership

Inflection Point: Rapid growth has required more staff and formalized systems

Timing: Founding tradition of collaborative leadership

Staff Hierarchy: Very little, but introducing positional authority as it formalizes

perfect fit as they considered staffing up. They hired a full-time executive director in 2017 and have since increased the number of paid staff positions to 2.5 FTEs.

Distributed leadership manifests most profoundly in Terrain’s collaborative decision-making processes. Despite her positional authority, the executive director includes volunteers, board members, artists, community members, and now paid staff members in making significant decisions. Staff describe a common practice of coming to shared conclusions, where everyone involved in decision making shares their perspectives, proposes various solutions or courses of action, and asks questions of one another, ultimately reaching unified agreement within the group. This process takes time, but the ED acknowledges that the benefits of building trust within the organization and with community members far outweigh the costs of a slower process.

Terrain Quick Facts

Location: Spokane, WA
Board of Directors: 15
Staff: 2.5 FTE
Formal Volunteers: 18
Budget: \$343,000

“I think that we would be doing a disservice to the organization if we didn't continue to embrace that idea of really strong collaboration.”

– Terrain Board Member



With events like its annual flagship performance, Terrain has contributed to a thriving arts community in Spokane. *Photo courtesy of Terrain.*

Challenges & Possibilities

Terrain is at a unique inflection point. It is moving from a completely volunteer-run organization to one with paid staff and an executive director. This has brought up questions about how to make decisions and formalize staff and board roles in what had been a completely decentralized organizational structure that relied heavily on collaborative processes.

The early stages of formalizing any nonprofit organization come with many decisions on how to structure roles and reporting. Adding the layer of distributing responsibility for these foundational decisions could muddy an organization’s clarity and resolve during a period when momentum and clear-sighted vision are necessary to moving to the next stage of organizational growth. Terrain’s board of directors recognize these challenges associated with distributed leadership. To mitigate them, they are working with the executive director and staff to develop an organizational structure that carefully balances processes for distributing leadership with ensuring the organization can still move at a pace that is responsive to change, both internal and external to Terrain. Board members are developing an organizational chart and complementary guidance documents that will reflect its practice of cultivating many decision-makers throughout the organization.

“I don’t think either one of us would make the same decision if we weren’t working together on something and saying to one another, ‘Okay, well, have you thought about this? Has this been something you’ve thought about?’”

– Terrain Operations Director

“I don't want to lose our connection to community. We're here because we love our community and we want to serve our community. Right now, of big importance to me is how do we maintain and preserve the essence of who we are as an organization but also formalize in a way that allows us to be sustainable and grow?”

– Terrain Executive Director

Snapshot: California Shakespeare Theater (Cal Shakes)

In the last five years, Cal Shakes, a regional theater in Orinda, CA, has set out to make its programming, staffing, and audience base more diverse, equitable, and inclusive. Rather than producing a season that consists of classically framed Shakespeare plays, Cal Shakes reorients Western classical works to be rooted in contemporary cultures and times, and complements its programming with adaptations and plays by living playwrights of color. Now, narratives and playwrights from beyond Western classical theater are a more visible part of Cal Shakes' programming, and the organization prioritizes initiatives that bring to the theater audiences who range in race, income level, and age, for example.

Taking a more inclusive approach to programming, however, was not a simple matter of the artistic director unilaterally deciding on what plays to produce. To make good on its commitment to diversity, equity, and inclusion, staff at Cal Shakes came to recognize and embrace the value of honest communication, shared decision making, and more participatory leadership within the organization. Given the interconnections between the programs they put on, the staff they hire, and audiences they reach, and the extent to which those elements reflect values of diversity, equity, and inclusion, the two co-directors (artistic director and managing director) at Cal Shakes saw an opportunity to bring more staff into decision-making processes.

Cal Shakes began exploring different processes and structures for facilitating a more participatory decision-making process. Already, Cal Shakes had structural opportunities for distributing leadership, at the very least, among its artistic director and managing director. Using this co-director structure, the managing and artistic directors could model and refine practices of honest communication, collaboration, and shared decision making for the rest of the organization. Co-directorship allows for a distribution of positional authority between senior leaders, but it was not going to be enough to move Cal Shakes toward the level of inclusion and participation it sought from the rest of its staff; they needed additional processes and tools to bring more people into decisions that matter.

Rather than seeing his position as at the top of a triangle, the artistic director emphasizes the metaphor of a circle, where individuals can choose to step up and speak or step back and listen, regardless of their formal place in the organizational chart. For example, to decide on the most recent season of its programming, Cal Shakes introduced

Cal Shakes: Factors Influencing Distributed Leadership

Inflection Point: Renewed commitment to diversity, equity, and inclusion in their work

Timing: Exploring distributed leadership practices while undertaking a series of efforts to expand diversity, equity, and inclusion

Staff Hierarchy: Several layers of positional authority throughout organization

Cal Shakes Quick Facts

Location: Orinda, CA

Board of Directors: 22

Staff: 50 FTE

Formal Volunteers: 150

Budget: \$4.5M

a programming matrix.¹ All staff could contribute to the matrix, adding plays they wanted Cal Shakes to produce, and weighing in on considerations like market demand and alignment with its commitment to diversity, equity, and inclusion. The matrix provided a place for staff to go to bat for a play they felt passionate about in a format that wasn't overwhelming to take in. From this input, the artistic director could work more collaboratively with the managing director and board of directors to make final decisions on the season's programming. For several plays in Cal Shakes' 2018 season, these leaders made decisions they wouldn't have otherwise made without collaborative engagement with staff. In addition to processes like the programming matrix, Cal Shakes assembles an Artistic Circle to discuss programmatic decisions and their implications for the theater—as a way of including more staff in the artistic direction of the organization. The Artistic Circle includes staff from across several departments: artistic, production, education, community engagement, marketing and fundraising.



Participatory decision-making processes rallied Cal Shakes' staff around productions such as Octavio Solis's *Quixote Nuevo*, directed by KJ Sanchez. Photo courtesy of California Shakespeare Theater. Credit: Kevin Berne

“What I love about this model is it often makes me a braver person. Left to my own devices, I wouldn't be as inclined to take risks. But, when there's a collective embrace of a choice, there's a shared sense of commitment—to the success of the work, to the opportunities the work affords. You recognize that you're not alone in your love of it, and that brings courage.”

– Cal Shakes Artistic Director

Challenges & Possibilities

Much of Cal Shakes' audiences have come to expect a British canonical repertoire, so Cal Shakes' departure from the Western canon in an effort to incorporate more diverse voices in its productions runs a risk of losing some audience members. The programming decisions, however, don't happen in a vacuum. Staff are advocating for more diverse and inclusive productions. Because more people in the organization weigh in on decisions, leaders feel more confident in making decisions that differ from the theater's history.

At the same time, in bringing more staff into the decision-making processes, directors and the board grapple with the degree of responsibility that this widened circle of leaders should carry, especially when it comes to the financial health of the organization. Departmental directors are still developing their abilities to lead through more distributed practices. Many in this widened circle do not have access to the organization's financial details, nor are they compensated equally with directors. Therefore, individuals with positional authority (i.e., the artistic and managing directors and the board), still have the final say on decisions. Distributed leadership at Cal Shakes remains an ongoing process of experimentation and learning.



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¹ Learn more about Cal Shakes Season Planning Matrix in the case study, *Cultivating Distributed Leadership: Tools and practices that build a participatory culture*.