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ACCOUNTING

Shared Leadership in Action:

Perspectives, Principles, and Practices

Executive Summary

To explore the growing trend of shared leadership in nonprofits, Brazen Consulting and Accounting undertook a study how shared leadership is impacting Baltimore-based and national organizations. During this exploratory phase of the study, we gathered information from 11 nonprofits (nine in Baltimore) with experience of shared leadership. We wanted to understand shared leadership more fully and how it can benefit the broader nonprofit and funding communities. To do this, we used group interviews with each organization's leadership, individual surveys, and one large group meeting with representatives of all 11 nonprofits. During this phase, the participants identified motivations, benefits, and challenges of shared leader ship.

Motivations for considering or adopting shared leader ship include:

» Leadership transition, including succession planning

» Increase of organization's effectiveness and efficiency

» Organizational mergers

» Desire for more collaborative leadership

» Prevention of executive burnout

Benefits of shared leadership include:

» More effective decision making

» Organizational growth

» More inclusive organizational culture

» Less isolation and better work-life balance for leaders

Challenges include the need for:

» Role clarity

» Education for funders about shared leadership

» Communication with boards and staff

To meet challenges, recommendations include:

» Space and time to plan how shared leadership will work in individual organizations

» Opportunities to learn from others using shared leadership

» Tools for communicating with funders

» Methods to measure the impact of shared leadership

Ultimately, as we continue this study, we aim to develop resources and strategies to support effective shared leadership, to strengthen the nonprofit sector in Baltimore and beyond.

Introduction

In recent years, more nonprofits have adopted shared leadership, rather than the traditional top-down structure with one executive director. This trend is also growing among the Baltimore nonprofits, indicating that organizations want more collaborative, distributed governance and decision-making. As a result, the Annie E. Casey Foundation engaged Brazen Consulting and Accounting to study the shift to shared leadership and its impact on organizations, particularly in the Baltimore region.

Shared leadership challenges traditional top-down leadership by fostering collective ownership, empowering diverse voices, and distributing responsibility across team members. While shared leadership has grown in popularity, we do not know much yet about how shared leadership works in practice, its benefits, and its unique challenges. To find out more, we consulted many stakeholders— especially those with experience with shared leadership. This study will explore their experiences in depth.

Over several months, we studied nine organizations from the Baltimore region and two outside this area.

How We Conducted the Exploratory Study

We began with an in-person session facilitated by Brazen. Participants were BCS by the Annie E. Casey Foundation's Baltimore Civic Site (BCS) Team. During this session, participants openly discussed and suggested questions to understand shared leadership more fully. Participants differed in what they knew about shared leadership and how to implement it in their roles as program officers.. Additionally, we learned more about funders' experiences with organizations using shared leadership.

The BCS team explained the study's key components but also invited feedback, which helped us refine the study's objectives. The participants' recommendations and shared knowledge will guide the BCS team in future investments and strategic decisions.

For this exploratory study, we used the following methods:

Group interviews	Individual surveys	A collective group session
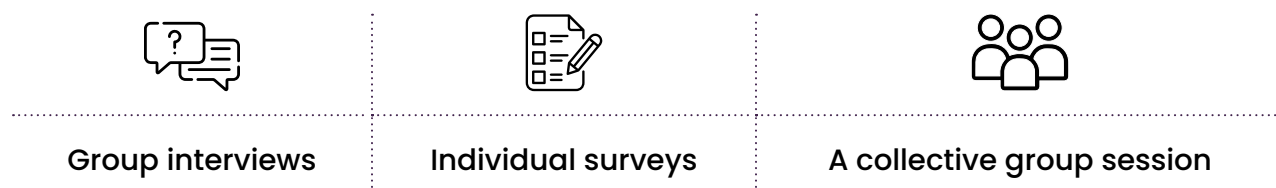
This combination provided both personal and collective reflections on shared leadership in action.

Group Interviews: We conducted group interviews, in virtual meetings, with leadership teams. We explored team dynamics, shared responsibilities, decision-making processes, and the successes and challenges of shared leadership. Participants shared different perspectives, giving a comprehensive view of each team's leadership structure. **Individual Surveys:** Each leader completed an survey about their views on shared leadership. Leaders gave candid feedback on sensitive topics. Survey data highlighted various perspectives among teams and offered quantitative insights about accountability, trust, and the essential qualities for effective shared leadership.

Collective Group Session: In a large group session, we brought all participants together. Leaders shared experiences, discussed common challenges, and explored best practices of shared leadership. Additionally, this session highlighted ways that philanthropic supporters can champion organizations practicing shared leadership.

By using this holistic approach, we captured a balanced view of shared leadership from multiple perspectives, providing actionable insights for organizations and funders alike.

A Short History of Shared Leadership

In Baltimore, the roots of shared leadership models date back to the mutual aid societies formed by free Black communities. Organizations like the National Association for the Advancement of Colored People (NAACP) later built on this foundation, advocating for leaders to collaborate to achieve civil rights goals. This collective work led to greater impact and efficiency in the movement.

During the 1990s and 2000s, nonprofits saw a significant shift, as organizations like the Baltimore Community Foundation, Healthcare for the Homeless, and Wide Angle Youth Media began prioritizing stakeholder engagement, adopting team-based leadership models, and empowering youth as co-leaders in programming and advocacy. Another transformative moment came with the 2015 Baltimore Uprising, which forced organizations to examine their leadership structures with a renewed focus on equity and inclusion. This introspection highlighted the need for leadership models that better reflect the values of shared power and collective decision-making.

By 2024, many organizations locally and nationally are exploring shared leadership, particularly at the executive level. Yet despite growing interest, there remains a lack of research and evidence on the model and few tools or opportunities for organizations to exchange knowledge about shared leadership. Participants in this study often felt their models worked but lacked ways to measure effectiveness.

As shared leadership continues to grow, we have an opportunity to understand the model more fully and explore how to put it into practice in different settings. These findings open pathways for further research and support to strengthen shared leadership.

Our Study Participants

- » Art with a Heart
- » Baltimore Corps
- » Baltimore's Promise
- » W. Haywood Burns Institute
- » CASH Campaign
- » Code in the Schools
- » Common Future
- » Impact Hub
- » RJ Village
- » Station North Tool Library
- » UMBC Shriver Center

Our Findings

What We Learned From the Group Interviews

Each organization's leadership team answered several questions about how and why they use shared leadership. They also shared about implementing shared leadership structures their nonprofits.

Definition and Philosophy of Shared Leadership:
Each organization defined shared leadership differently. However, their definitions shared common ideas including:

» Heightened ability to collaborate

» Distribution of accountability and responsibilities

» Reallocation of power/non-hierarchical structure

» Collective decision-making

» Value-based/Value-driven

» Adaptive and flexible

» Heavily relational

» Shared learning and development

» Able to leverage diverse strengths and perspectives

Motivation for Transitioning into Shared Leadership:

Each organization had its own reasons for adopting shared leadership. Out of the 11 participants, only one has used a shared model from the start. Motivations for adopting shared leadership include:

» Succession planning

» Transition of leadership

» Increased organization capacity and growth

» Prevention of executive burn out

» Organizational mergers

» Alignment with organizational mission of collaborative leadership

» Reallocation of roles and responsibilities

Benefits of Shared Leadership:

Organizations highlighted how shared leadership benefited their nonprofit, both for the organization and for the leaders themselves. For them, the impact of shared leadership extended far beyond the day-to-day needs of the organization. Shared leadership also enhanced the personal development and home life of leaders.

Benefits include:

» Enhanced decision-making

» Organizational growth and efficiency

» Reduced isolation and increased support

» Diverse perspectives and thought partnership

» Increased resilience

» Feedback and shared responsibility

» Better work/life balance

» Increased personal and skill development

» Unified organization vision

» Leveraging strengths

» Burnout reduction

» Staff empowerment

Challenges in Shared Leadership:
While we highlight benefits of shared leadership, we must also understand its challenges. Many challenges may be addressed with additional structure or coaching, while other challenges will need extra support.

Challenges include:

» Maintaining clear, consistent communication (internal and external)

» Balancing power dynamics

» Making sure leaders are all on the same page

» Refining the shared leadership model consistently

» Making time and space to properly plan and implement the shared model

» Clarifying roles

» Navigating board and external partners not familiar with shared leadership

» Making decisions

» Dealing with different leadership styles and personalities

» Building trust and being vulnerable

» Helping staff adjustment to model

» Knowing when to lead and when to follow

» Budgeting and justification of shared leadership to funders

Organizational Structure and Distribution of Roles:
We also learned that participants structured their shared leadership in three main ways.

1. Flat structure, where people have equal responsibilities across the organization.

2. Structure based on the strengths and experiences of each leader

   » Someone with programming expertise may lead those responsibilities, while another co-lead would manage operations. This division of roles and responsibilities allow

individuals to work where they thrive most. Focusing on specific areas, however, does not keep leaders from contributing to other areas.

3. Project-based leadership, which allows for better collaboration among project teams.

From this study, we learned that each organization works hard to identify the best structure for their work. Many expressed interest in learning more about the different structures, as they had not tried other ways to implement shared leadership. Many were seeking ways to refine their current structure.

Decision-making and Conflict Resolution:
Shared leadership emphasizes collaboration, inclusivity, and collective accountability in decision-making. This runs counter to top-down models where decisions are often made in silos and without input. Among the participants, however, decision making is often fluid, relies on consensus, and promotes shared ownership of outcomes. Additionally, participants resolve conflicts collaboratively based on the organization's values and culture.

Building open communication and trust takes time but is critical for effective shared leadership.

Some participants noted the importance of anticipating potential conflicts and having proactive conversations. Setting expectations upfront and having tools, strategies, and established processes streamlined the decision-making or conflict resolution. None of the participants identified challenges or decisions that they could not resolve as a team. Helpful tools include:

- » Resolution methods in bylaws
- » Leadership Charter

Monitoring and Evaluation:
Shared leadership models require constant learning and adaptability. Most participants do not have a "formal" method to monitor implementation or effectiveness. When discussing the effectiveness of shared leadership, participants expressed different views. Some participants focused on the metrics of their organization, while others spoke about their own personal feelings and overall wellness.

Most organizations relied on feedback from staff and stakeholders to determine effectiveness or need for adjustments. Ongoing discussions, observations, and surveys contribute to this decision making.

Participant's metrics focused on the organization or the personal:

Organization-focused:	Personal:
» Financial health of organization » Participation of those served » Information from directors and board meetings	» Blood pressure reduction » Emotional wellbeing » Stress reduction » Fewer hours worked

External Relations and Stakeholder Engagement: Shared leadership encourages authentic, two-way communication, both internally and externally. Many organizations communicated the shift to shared leadership via newsletters, social channels, and blogs.

During the study, two needs surfaced—additional education and building support. Communicating the shift to shared leadership externally presented challenges. Most people are used to the idea of a single executive director and are unfamiliar with shared leadership. This adds to the organization's work, as it must keep educating about shared leadership, its benefits, and why it was a good decision for the organization.

Participants noted that they particularly needed to engage and educate funders. Funders typically expect to relate to an executive director. Working with multiple leaders is an adjustment.

When seeking funding, simple challenges include not having enough space on grant portals to list more than one leader. More complex challenges include justifying the salaries of multiple leaders and their different roles.

Cultural Impact and Internal Dynamics: By spreading out decision-making and leadership, shared leadership amplifies diverse voices and perspectives, rooting an organization's culture in equity and mutual respect. This approach encourages open dialogue, shared accountability, and the co-creation of values that align with team goals.

Shared leadership also encourages collective growth and wellness. Consistently, participants noted the impact on personal wellness and well-being. For many, the release of pressure and responsibility has been life-changing. The benefits of shared leadership included better health conditions and the opportunity to spend more time with family.

Shared leadership does not just exist at the executive level. Many organizations use methods that include all staff members. All staff may not have the same amount of influence, but the ability to contribute promotes more buy-in to the organization's mission.

Even with all the benefits of shared leadership, it does create a dynamic that may need additional management. Many people are not familiar with how shared leadership works in practice, and several participants noted that having more information or experience before making the shift would have helped. Prior research would not have eliminated all challenges, but it may have given more insight about managing the transition.

Consistently, participants noted role clarity and communication as critical factors in internal dynamics. Touching base frequently was important both among the leadership team and with additional staff. Several organizations were still seeking the best method for communicating among staff. While leadership roles are being fleshed out, decision making and knowing who to contact for an issue can be challenging.

What We Learned From the Individual Surveys

What We Learned From the Collective Group Session

In this session, leaders identified key strategies, needs, and considerations for shifting to shared leadership.

Key Strategies for Succession Planning

1. **Supporting Emerging Leaders:**

   » Clearly define steps, tools, and resources for leadership development.

   » Provide opportunities for mentoring, networking, and introductions to key stakeholders.

   » Align expectations with the realities of shared leadership, emphasizing the distributed nature of responsibilities.

2. **Role Clarity and Communication:**

   » Develop and communicate job descriptions that separate, merge, or delegate responsibilities across leadership roles.

   » Inform stakeholders about what shared leadership entails to build understanding and buy-in.

   » Emphasize that the executive director role is not a singular position but a collective effort under shared models.

3. **Feedback and Engagement:**

   » Create systems for staff to provide feedback on leadership transitions.

   » Foster open communication to address concerns and align on organizational priorities.

Needs

For shared leadership to be effective, participants highlighted the following critical needs:

- » **Space and Time:** Allow for planning and the natural growth of shared leadership structures, recognizing that there is no one-size-fits-all approach.
- » **Funding:** Secure financial resources to support multiple full-time leadership roles and restructuring efforts.
- » **Board Training:** Equip board members with the skills and understanding to work within shared leadership frameworks.
- » **Sector-Specific Insights:** Explore trends, differences, and practices within various sectors and larger institutions to guide implementation.
- » **Relationship Development:** Build trust and relationships within teams and with external stakeholders to ensure smooth transitions.

Considerations

- » Participants noted the need to evaluate whether to merge existing roles or start from scratch when restructuring for shared leadership.
- » They discussed the different formations of organizations (mergers vs. startups).
- » Participants also emphasized assessing how processes and outcomes may differ based on organizational context, scale, and structure.
- » For instance, the challenges for an organization that is part of a larger institution could differ greatly from an independent organization.

Group Session Conclusion

Succession planning in shared leadership is complex but necessary for effective leadership transitions. By addressing these strategies, needs, and considerations, organizations can create a more inclusive, adaptive approach to leadership—ensuring long-term success and alignment with shared values. Additionally, some key needs require additional outside support.

In Conclusion

More and more nonprofits are adopting shared leadership to share responsibilities, bring in diverse perspectives, and build a collaborative culture. Shared leadership offers significant benefits, including improved decision-making and increase organizational effectiveness. However, it also poses challenges, such as defining roles, maintaining effective communication, and addressing external perceptions. Organizations are continually refining their shared leadership practices and educating stakeholders to build broader support for this innovative framework.

This report provides funders and other stakeholders with preliminary data on the needs of organizations using shared leadership. Additionally, this report also helps organizations currently using or considering shared leadership, with insights from nonprofits with experience in shared leadership. Leaders often have questions about their approach, so learning from other leaders can inspire confidence, inform adjustments, and highlight areas for growth. The study participants expressed a shared desire for greater awareness of shared leadership in action. With this report, we sought to meet that need, laying a foundation for action and further exploration.

Recommendations

1. Community of Practice:

Participants expressed a strong desire for a dedicated space for ongoing learning and engagement. Establishing such a space, housed and facilitated by the right organization, could offer invaluable support to those practicing shared leadership. In this space, leaders would be able to share:

» Experiences

» Tools

» Implementation and operational methods

» Data and research

» Networks

By helping leaders to work together and exchange expertise, this space would empower organizations to strengthen their shared leadership practices and contribute to the broader nonprofits' growth and success.

2. Invest in coaching or consultants:

Several participants reported that grant-funded coaching and consulting significantly improved their transition experience. Access to resources to bring in third-party experts provided critical guidance for navigating the steps through an equitable transition. These consultants offered valuable perspectives on anticipated challenges, and helped leaders think through issues throughout the process. After the immediate transition, consultants equipped organizations with tools and strategies to address future challenges, ensuring long-term benefits and a smoother shift to shared leadership.

3. Bring together funders and share findings:

Funders need education to address the information gaps they may have about shared leadership. Bringing funders together or finding other ways to share gathered data with them could significantly benefit shared leadership. Participants identified specific challenges, including limitations in application processes (such as insufficient space to list all leaders) and communication barriers. Raising awareness about the growth, benefits, and challenges of shared leadership among organizations will help funders better understand and support shared leadership.

4. Support justification for funding:

Many participating organizations face challenges with budgeting and providing justifications for funders. Organizations want to know how to better educate and communicate with funders and budget structures about shared leadership..

5. Support with communications:

Organizations identified both internal and external communication as critical to their success. They would like to learn effective strategies for engaging key stakeholder groups, including:

» Funders

» Board members

» Staff

Clear and consistent communication with these groups is essential for fostering understanding, alignment, and support—ultimately enhancing organizational effectiveness and cohesion.

6. Develop an assessment tool or method to measure shared leadership effectiveness:

Most organizations have no way to measure shared leadership effectiveness other than feedback and typical data metrics. These metrics often describe how the organization is operating (such as number of participants or amount of funding) but may not tell how shared leadership impacts performance. Some leaders shared the personal impact, noting their improved overall health and wellness. However, a streamlined assessment method with a holistic look at shared leadership would help organizations educate others.

7. Deepen understanding of:

» The impact of industry and structural differences
» Mergers vs. startups

Each organization has its own motivations for considering shared leadership. Additionally, each organization implemented shared leadership differently. Experiences often differ greatly based on an organization's structure. For example, a participant operates within a highly hierarchical institution. Despite this structure, the center's leaders are shifting the internal culture towards shared leadership. This context has nuanced challenges that independent organizations may not face. Exploring these differences could yield deeper insights into how shared leadership works in different settings.

8. Create a roadmap/guide on transitioning to shared leadership:

Organizations shared that a roadmap to guide their transition to shared leadership would have helped them tremendously. While recognizing that no single process fits every organization, a roadmap could provide foundational guidance for creating a transition plan and supporting leaders in charting a path forward. This tool would be a starting point, helping organizations navigate the complexities of implementing shared leadership.

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