

Support for preventing and resolving conflict

Report from working group, May 2023 to April 2024

The background

Whilst everyone across Citizens Advice shares the same aim of serving clients, there are inevitably times when conflict situations arise. This includes tension within local leadership teams, for example between a chief executive and a chair of trustees.

Previously there hasn't been clarity on the resources available to support those involved, or indeed the responsibilities of different roles (for example, the extent to which the national organisation would or wouldn't be involved). In light of this, a working group to look at support for preventing and resolving conflict was set up in mid-2023.

The aim

The [outline plan](#) for the group, which was proposed at the first meeting, identified four areas for the working group to look at.

- **Written or recorded resources and guidance** - existing or new materials that can be shared with local offices facing conflict situations
- **External organisations / support** - external organisations who can provide support, even if this is chargeable. This might include existing partners like NCVO, or those we're not currently linked with, like ACEVO or the Association of Chairs
- **Peer support** - a more structured approach to peer support in conflict situations, whilst fully exploring confidentiality and other issues
- **Relationship managers** - how relationship managers work in conflict situations, noting that the current focus is on the local organisation (and therefore the trustee board)

The process

In May 2023, local leaders and national staff were invited to join a working group exploring this issue. Chief executives were approached by Pippa Mackie (then chief executive at Citizens Advice Kingston), primarily through the peer group, whilst the opportunity was [promoted to trustees by Claire Graham on Workplace](#) and via Trustee News. A number of national colleagues were approached by Toby Parsons (senior relationship manager), particularly from teams likely to engage closely with local offices.

As well as these initial invitations, further opportunities were promoted more widely during 2023, particularly for the third meeting of the group in December 2023, which was included in the weekly emails from Michele Shambrook to chairs and chief executives.

Four meetings took place, as summarised below (the meeting notes are linked from the dates);

- [31 July 2023](#) - agreement on scope of group and approach, plus initial discussion

- [2 October 2023](#) - developing initial proposals, via break out rooms; email discussions to continue during Oct/Nov
- [12 December 2023](#) - detailed discussion of initial proposals; sub groups set up for Jan/Feb to progress to final recommendations
- [12 March 2024](#) - final review and agreement of recommendations

A small number of group members presented the work to the Trustee Liaison Group on 25 April 2024, leading to a useful discussion.

A review meeting has been scheduled for 2 October 2024, in order to assess the impact of the recommendations and any follow up that may be needed.

The discussion points

The opportunity to engage in constructive discussions led to a number of observations which are important to keep in mind;

- **Conflict can result from the approach taken by one or both parties** - both chairs and chief executives noted that fault can lie on either side, although it's rarely fully attributable in one direction only. A [fictitious example](#) produced within the working group highlighted how situations can deteriorate even when everyone involved is seeking a similar outcome and genuinely believes they're taking the right steps
- **Those who are most likely to need support are least likely to engage with it** - the group recognised that this applies in many situations, not just in relation to conflict. A local office which is struggling with governance and operational delivery may be resistant (either deliberately or simply due to bandwidth) to seek or receive support
- **Conflict can arise about a wide range of issues, including seemingly minor ones** - it was acknowledged that there is no single cause of conflict, and that the seeds can often be sown through small interactions that build up hostility over time. When conflict is triggered by a single issue, it is often one of the following;
 - Level of performance information required by the board / provided by the chief executive
 - Differences of opinion on funding gaps and how / when to restructure
 - Feedback from staff or volunteers about the chief executive, particularly if shared 'informally' with trustees
 - Contrasting expectations on trustee access to IT systems, records, etc

The notes from each meeting can be viewed in the previous section, but some of the key discussion areas included;

- **The importance of good governance** - the experiences shared by members of the group highlighted that poor governance, and even just lack of clarity about delegated authority and processes for addressing issues, is a key driver of conflict. The group explored how and if the leadership self assessment could help with this

- **The importance of good relationships** - whilst good governance and clear processes are clearly important, the group acknowledged that it's fundamentally about relationships. Ensuring these get off on the right footing when a new chair or chief executive starts, and investing time in maintaining them, is really important (although sometimes easier to say than to do)
- **The focus of national Citizens Advice** - the challenges involved in supporting both sides of a conflict situation were acknowledged, as was the issue of a chief executive suddenly being abandoned by those who normally support them (e.g. relationship managers), if the national organisation focuses only on the trustee board. This was a particularly difficult topic, but on balance it was recognised that it's not possible, with openness and integrity, for national staff to support both sides. It's important instead that a wellbeing offer and peer support are available to chief executives
- **The potential of mediation** - it was highlighted that a number of trained mediators exist within the Citizens Advice service, and exploring professional mediation at the earliest possible stage can potentially avoid significant financial and emotional costs to a local office. The group was keen to facilitate this (by creating a list of mediators) and to strongly recommend that mediation is promoted and considered in any possible conflict situation

The recommendations

It was recognised at an early stage that there are many resources already available, particularly around induction and training, which were identified as two key areas for the preventative angle. Any new material would be likely to be a duplication, and even a summary document has an element of that.

The group therefore focused on creating a [set of recommendations](#) to be made available to all local offices. In the combined experience of both the network and national colleagues in the group, these recommendations constitute best practice and all local Citizens Advice are encouraged to follow them.

Practical steps taken

The recommendations from the working group were shared in the weekly email to chairs and chief executives on 27 June 2024 (from Marios Leptos, covering for Michele Shambrook).

The recommendations were also shared with national colleagues who may encounter conflict situations, for example relationship managers. There has additionally been discussion within relevant teams as to how this guidance can best be promoted and used.

The leadership self assessment (LSA) guidance was updated to reflect good practice which is likely to prevent conflict arising, in line with the working group discussions and recommendations.

A [list of mediators](#) was created, following an invitation to anyone in Citizens Advice to share details of accredited mediators with experience of working with the network (whether themselves or individuals / companies they're familiar with). The list is currently short, but the option remains to add new information, which can be emailed to toby.parsons@citizensadvice.org.uk

The option of hosting a 'show and tell', or other form of webinar, was considered after the final working group meeting. Capacity pressure, along with the range of other issues facing chairs, chief executives, and national colleagues, meant that this wasn't taken forward.

The people involved

The following people regularly took part in working group meetings or actively participated in other ways. This included 9 chief executives, as well as a number of local trustees and members of national staff. There were also several others who attended one meeting, or who shared specific thoughts, but who aren't listed below. Thank you to everyone for the time that's been invested in this work!

- **Andy Brown** Chief executive, Citizens Advice Manchester
- **Ayub Khan** Chief executive, Citizens Advice Harlow
- **Biddy Mayo** Chief executive, Citizens Advice Fareham
- **Chris Roberts** Chief executive, Citizens Advice Bromsgrove & Redditch
- **Claire Graham** Trustee Engagement & Support Lead, national Citizens Advice
- **Dawn Kirsopp** Head of Member Relations & Support, national Citizens Advice
- **Jan Stewart** Chief executive, Citizens Advice Dover & Deal
- **Kush Saini** Trustee, Citizens Advice Camden
- **Max Beseke** Relationship manager, national Citizens Advice
- **Maxine Bromyard** Chief executive, Citizens Advice East Herts
- **Paul Hardy** Chief executive, Citizens Advice Maidstone
- **Rachel Irvine** Performance manager, national Citizens Advice
- **Steve Gray** Trustee, Citizens Advice Tendring
- **Suzanne Green** Trustee, Citizens Advice Bromsgrove & Redditch
- **Tal Michael** Chief executive, Citizens Advice Gwynedd
- **Toby Parsons** Senior relationship manager, national Citizens Advice
- **Venice Marriott** Lead strategic change consultant, national Citizens Advice
- **Zoe Bradley** Chief executive, Citizens Advice Bournemouth, Christchurch & Poole