**In the role of leader**

Check off ☑ each item when you have considered how it applies to your situation and decided what you must do.

**Identify personal support**

1. [ ]  **‘Champions’** -who support your ideas and help you achieve them
2. [ ]  **‘Critical friends’** who you trust for honest criticism that helps you learn and to avoid mistakes
3. [ ]  **Peers** in similar leadership roles, with whom you can exchange ideas
4. [ ]  **Emotional support** People outside of the circle you lead, with whom you can be honest about your feelings, frustrations and successes.
5. [ ]  **Friends and family,** so you can step out of leadership roles at times and be yourself
6. [ ]  **A mentor** Someone who can share relevant experience and advice
7. [ ]  **A coach** A neutral experienced person who acts as a confidential sounding board for your thoughts).

**Create an inspiring vision**

1. [ ]  **Be clear of your aims** Consider this before taking on a leadership role. Think through what you want to accomplish in the role: What could you help to improve? What are your goals? What would the signs of success?
2. [ ]  **Consider the appeal:** why would your vision appeal to most or all of those you need onside in order to bring it into being? What is in it for them?
3. [ ]  **Sum it up** Put your initial vision into a few words and, ideally, a compelling image. Be able to state this, easily, if asked what you want to achieve.
4. [ ]  **Talk it through** When in role, discuss your vision with key stakeholders before broadcasting it widely. Take advice on how best to refine and communicate it.
5. [ ]  **Enable others to contribute** If possible, involve the whole team or organisation in shaping and refining your vision from as soon as you are leader, so they feel it belongs to them fully, too.
6. [ ]  **Crystallise the vision** Draw on the various inputs in order to refine and finalise the vision.
7. [ ]  **Communicate it** Keep the vision alive through involving stakeholders in discussing it, updating it, providing news of progress, infographics, data, etc.

**Delegate effectively**

1. [ ]  **Clarify tasks** Identify the key areas of work that need to be done.
2. [ ]  **Share tasks** Decide whose abilities and preferences makes them the best to take on particular roles or tasks.
3. [ ]  **Clarify expectations** to avoid misunderstandings – such as for roles, targets, milestones, completion dates, and on who is in charge of tasks that fall between two roles, etc.
4. [ ]  **Sharing** Agree how you will all keep track, communicate, and provide updates
5. [ ]  **Provide space** Let people get on with their jobs. Allow individuals opportunities to develop their own plans for meeting goals
6. [ ]  **Ask** When new tasks arise (as they will), don’t be afraid to ask others to do these.
7. [ ]  **Recognise and utilise talent.** Appreciate others will do certain things better than you. Enable others to work to their strengths.

**Show appreciation**

1. [ ]  **Ask opinions** Provide opportunities for the team to help you devise strategy, make decisions, set targets and evolve solutions
2. [ ]  **Respect the effort** Enable people feel encouraged to contribute again in the future.
3. [ ]  **Notice what others contribute** – so that your appreciation comes across as genuine
4. [ ]  **Close the loop** Let people know how their suggestions and comments have been considered and adopted.
5. [ ]  **Specify contribution** Ensure everyone knows how they contribute to the end goal
6. [ ]  **Say thank you**. **Give praise** When you appreciate or admire the way someone has done something, say so. Be specific.
7. [ ]  **Give public credit** Be ready to say when someone else’s ideas or work was significant. Draw attention to achievements that are less visible.
8. [ ]  **Share the glory** When things go well, make sure everyone feels they are part of the success.
9. [ ]  **Be fair and even-handed** in giving recognition, praise and thanks.
10. [ ]  **Celebrate** Provide opportunities to celebrate milestones along the way as well as at the end.

**Take responsibility**

1. [ ]  Lead by example.
2. [ ]  Set the ethos – establish the values and expectations of ethical behaviour

1. [ ]  Act with integrity. Aim to do the right thing, and own up to your mistakes.
2. [ ]  Check that the right mechanisms are in place for enabling everyone else to work effectively, with due care for their well-being.
3. [ ]  Be available for others to raise important matters with you.
4. [ ]  Ensure the team function smoothly; if not, help it resolve the issues.
5. [ ]  Where relevant, ensure that you and/ or the team have access to expert advice for matters that affect the security, finances, data, well-being and for understanding legal responsibilities.
6. [ ]  Follow through on your promises. Don’t make promises you can’t keep.
7. [ ]  If things go wrong, take the necessary steps to put them right.

**Clarify expectations**

1. [ ]  Negotiate clear goals or targets
2. [ ]  Specify how each person’s work connects to the work of others
3. [ ]  Set, or negotiate, clear ground rules
4. [ ]  Clarify what would be regarded as successful outcomes
5. [ ]  Keep uncertainty to a minimum.

**Develop the strategy**

One of the main tasks of a leader is to develop the strategy, harnessing the team’s ideas, talents and experience to devise and plan it. This orchestrates all efforts and resources towards the main goals.

1. [ ]  Research thoroughly; what has happened up to now, the data available, the options open to you, the risks and opportunities etc.
2. [ ]  With the team, identify what needs to be done in order to achieve the vision/ goals.
3. [ ]  Agree a realistic overall schedule for ensuring tasks are completed in a timely way.
4. [ ]  Put communications in place to enable everyone to keep up to speed with what they need to know.

**Get the basics right**

**1. Manage reputational risks**

1. [ ]  Act with honest and integrity.
2. [ ]  Be sensitivity to how your words or actions could be interpreted.
3. [ ]  Undertake ‘due diligence’: check details carefully before taking action.
4. [ ]  Sound out experts for advice.
5. [ ]  Check your online profile. Remove material that could undermine you or others.
6. [ ]  Ask friends or colleagues to help ensure you avoid unintended reputational risks.

**2. Manage time**

1. [ ]  Always have your diary/ planner to hand
2. [ ]  Book ‘down time’ to recharge energy
3. [ ]  Book yourself time to think and plan
4. [ ]  Book time to keep in touch with the team
5. [ ]  Avoid double booking: always check before confirming invitations and requests
6. [ ]  Have someone else ready to cover key meetings and tasks in case of emergency

**3. Be seen to be fair**

New leaders are often taken aback at how apparently petty matters (such as who they smile at, agree with, spend time with or help out) are interpreted as signs of favouritism.

1. [ ]  Treat everyone with respect and courtesy
2. [ ]  Use objective measures or feedback to check that you are being fair
3. [ ]  Establish fair processes to help avoid inadvertent favouritism - such as for allocating roles, hearing all sides of an argument, and sharing out resources.