

Final Report

Towards a More Vibrant Social Leadership Ecosystem

Insights Paper | Social Leadership Project | October 2025

The Social Leadership Project was started by a group of funders—including [Collective Futures](#), the [Hg Foundation](#) and the [Henry Smith Foundation](#)—with a shared interest in social leadership.

In March 2025, [System Shift](#) was appointed to lead a nine month project to gather insight about the current state of the field and scope the potential for greater funder collaboration.

The research phase has focussed primarily on social **leaders** and leadership development **providers**. By 'social leader' we mean anyone who mobilises people, ideas or resources to drive positive change in society: an intentionally broad definition at this stage.

We conducted:

- Three focus groups with social leaders (totalling 24 participants)
- Two focus groups with providers of social leadership development (16 participants)
- 13 interviews (nine with providers and four with leaders)
- A providers survey (28 responses). [See full analysis.](#)
- A survey of those self-identifying as leaders (262 respondents). [See full analysis.](#)

There is no single dataset on the scale or activities in this field. To enable us to develop an indicative picture of characteristics we built a database of social leadership development provider organisations and 'offers' – discrete training courses, fellowships or learning communities. Where possible, we gathered data on the scale of participation of those offers, and financial data on the providers. We also worked with datasets from the Charity Commission and Companies House to build out a picture of the field. This data is illustrative, not comprehensive.

This paper is for research participants to summarise some of the key insights from the activities outlined above. It has three sections:

1. Leading Change – insights captured about the conditions for social leaders today, their engagement with leadership development and barriers to accessing support
2. Growing Leaders – mapping the ecosystem of providers – what they offer to whom, and how they innovate.
3. Funding Development – analysis of the kinds of business models developed by providers and what they shared about their experience of fundraising for their work.

System  Shift

Section 1: Leading Change

Social leadership in the UK in 2025 is varied and diverse.

Civil society is made up of a tapestry of groups, projects and institutions, led by civically-minded leaders working with different theories of change and philosophies. These leaders include public servants, charity leaders, campaigners, politicians, community organisers, and many more.

Analysis of our survey pointed to the fact that today's social leaders are not necessarily single-sector professionals. Those working in the field have likely developed their skills and leadership capacities in different sectors and settings.

"I can't express enough how working across sectors has been critical to my professional success."

Social Leaders Survey Respondent

When asked about sectors they had previously worked in, most identified at least one that was not the charity sector. 46% identified themselves as *currently* working in two or more sectors. Many of the leaders we engaged with in interviews and focus groups adopted multidisciplinary approaches and strategies within their own social change work.

The mood is dark: challenges across the social sector are increasing and leaders are feeling the strain.

Across the social sector, there is a growing sense of instability. Years of shocks—from the pandemic to austerity and the cost of living crisis—have stretched organisations and shaken communities, while austerity eroded vital income streams. Stress, anxiety and burnout emerged as major themes across focus groups, raised by both leaders and providers. We heard accounts from leaders in migrant or racial justice fields who are facing online hate or even threats to their physical safety.

Social leaders are contending with new challenges, like disinformation powered by AI. These pressures limit leaders' staying power, impact and personal wellbeing.

"We've been in this state of stress for many, many years...it takes its toll on the body."

Social Leader

Focus Group Participant

Many leaders are struggling on modest or low incomes, particularly those in smaller organisations and grassroots settings. Some face personal financial insecurity. Pro Bono Economics report a 7% pay gap between charity sector workers and those working in the rest of the economy¹.

"Financial vulnerability in this sector is huge...some of the people...that are held up as leaders can't friggin' pay their rent"

Social Leadership Development Provider

Focus Group Participant

In focus group conversations, leaders described a culture of self-sacrifice in the field, with fears that taking time out to pursue development would be seen as self-indulgent.

They highlighted the importance of a supportive board and funder(s), who can unlock leaders' ability to access development opportunities by emphasising the value of learning, development and rest.

"We need boards to be saying, 'We're not signing off this budget because there's no element in it for leadership development.'"

Social Leadership Development Provider
Interview Participant

¹ [The price of purpose? Pay gaps in the charity sector](#), Pro Bono Economics, August 2022

Leaders see considerable value in participating in leadership development.

100% of respondents to the survey of leaders reported participating in some form of learning or leadership development activity in their career, and 85% had participated in formal social sector training or leadership development. Across our engagement with social leaders, the value placed on leadership development came through clearly—particularly peer support, mentoring and coaching.



Source: Social Leaders Survey (July 2025)

Respondents answered the following questions and were allowed to tick more than one option:

"Which of these types of development activities and experiences have you taken part in?"

"Looking back, which of these types of development activities and experiences have you found most valuable in your journey?"

"Thinking about where you are now, which other activities and experiences would have been useful to you on your journey or would be useful to you now?"

Short courses, peer support networks and people management training were the most common activities that respondents engaged in. Peer networks were the only activity of those three also ranked highest for being most valuable to development—alongside **mentoring and coaching** and **communities of practice**.

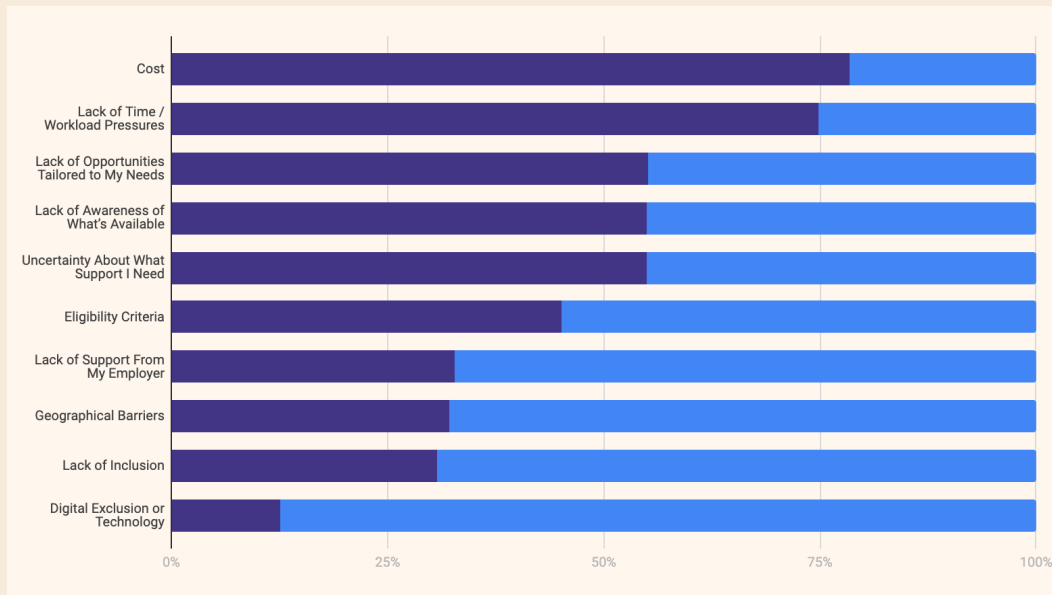
Free response fields revealed that networks and peer learning experiences were valued as spaces to share experiences, explore challenges dynamically and reduce feelings of isolation.

"Peer support = making connections to individuals who can help break down doors, create opportunities and support one another...[this] is forever important"
Social Leaders Survey Respondent

40% of leaders selected **systemic leadership training** as something they'd find useful now, highlighting a growing awareness that confronting entrenched issues requires collective action across systems.

Access to leadership development can be limited by cost, workload and suitability of provision.

Social leader survey respondents were asked to rate barriers to accessing leadership development. Across all respondents, the most highly rated barriers were **cost** and **lack of time** to participate. Leaders also flagged challenges navigating the field, with a **lack of awareness of what's available** and **uncertainty about their individual support** needs as the next most highly rated barriers.



Source: Social Leaders Survey (July 2025)

Respondents answered the question "To what extent do you feel the following are barriers to you accessing relevant development opportunities?"

Other answers referred to format and delivery challenges; confidence, identity and imposter syndrome; learning styles and neurodiversity needs; and personal circumstances.

While not as highly rated as a barrier in the survey, challenges around **inequity and exclusion** came up in free response fields in the survey and focus group conversations about access and provision, including the North-South divide, managing childcare responsibilities, neurodivergence, age, race and class. These issues persist despite 47% of respondents to our providers survey stating that addressing inequity in social leadership was an explicit aim of their programmes.

Of providers that explicitly focussed on addressing inequity in social leadership, a range of methods were referenced, such as:

- Offering living wage stipends and bursaries to ensure financial access;
- Targeting underrepresented groups through recruitment partnerships;
- Unconscious bias training and blind recruitment; and
- Equity-centred curricula that integrate social justice and anti-oppression topics.

Alongside (but distinct from) equity considerations, there has been a focus on the contribution made by 'experts by experience' in the social impact field over recent years. Despite this increased attention, leaders and providers told us that lived experience is still undervalued relative to academic qualifications.

"We're seeing leaders emerge from lived experience, and that creates a different kind of identity—one not always recognised by traditional structures."

Social Leadership Development Provider
Focus Group Participant

Many leaders told us about the lack of shared lived experience between themselves and the providers and funders of social leadership development.

Section 2: Growing Leaders

The menu of social leadership development offerings is wide-ranging.

We identified 228 organisations that provide social leadership development opportunities in the UK and 258 ‘offers’ – discrete training courses, fellowships or learning communities. This is not a comprehensive list but it provides a good indication of the range of provision.

We surfaced an emergent typology of social leadership development providers. Although no typology is perfect (some providers may not fit in any ‘type’; others may identify with more than one), this typology helps us understand the constituent parts of the field and how their leadership experiences the ecosystem as a whole.

Public Service Placement Schemes Typically place early career leaders in public service delivery roles as part of a structured leadership programme. e.g. Teach First	Charity Sector Training Providers Offer high-volume training sessions and courses (online and in-person) for charity sector professionals. e.g. intrac	Social Enterprise Incubators Recruit small cohorts of social enterprises to help fund and catalyse their growth, most commonly over a 3-6 month period. e.g. Bethnal Green Ventures
Specialist Public Sector Programmes Provides bespoke training to public sector leaders and political representatives. e.g. Local Government Association	Cross-Sector Leadership Programs Long-term programmes running alongside a full time job aiming for transformative change in the capabilities of the participating leader. e.g. Forward Institute	Movement Building Training Orgs A small cluster of specialist organisations focussed on building power and influence in social justice movements. e.g. Advocacy Academy
Academic Programmes Social impact-specialist academic programmes within universities and academic institutions. e.g. Centre for Charity Effectiveness at Bayes Business School	Mainstream Learning Platforms Large-scale, online, on-demand mainstream learning platforms that also offer a small number of social change-related courses. e.g. Udemy	Peer Networks and Communities A small and emergent cluster of organisations, usually informal, that convene peers for mutual learning and reflection. e.g. Mycelial Network

For 63 of the 228 identified providers we collected data on the annual number of participants. This pointed to a total of over 23,000 participants in social leadership development programmes each year. For 97 of the 228 identified providers we collected annual revenue data. This gave us a total of over £400 million annual revenue for the leadership development providers we captured data on².

Although both of these datasets are just part of a bigger picture—with academic programmes and mainstream learning platforms being particularly hard to gather participation and financial data on—they give us an indication of relative scale.

On both measures (volume of participation and annual revenue), Public Service Placements Schemes ranked highest. Cross-Sector Leadership Programs and Social Enterprise Incubators were the next largest by revenue.

² Sourced from the Charity Commission or Companies House. Note that many providers do more than leadership development and, as such, these figures do not represent a market size for the social leadership development field.

Providers play a role at different stages of individuals' leadership journeys, supporting people into, through and even *out* of social leadership.

Providers support leaders across a range of career stages. Each year, a cluster of schemes ([Teach First](#), [Frontline](#), [Police:Now](#) and more) recruits thousands of potential young leaders into public service. Other programmes ([On Purpose](#), [Escape the City](#), [Public Practice](#) and others) explicitly aim to support mid-career professionals to transition into a career with purpose. Emerging leaders are served by an array of social enterprise incubators (like the [School for Social Entrepreneurs](#)), specialist programmes (like those delivered by the [NHS Leadership Academy](#)) and fellowships (like the [Forward Fellowship](#)). Established leaders benefit from bespoke 1:1 support such as coaching or, for established leaders of organisations, direct strategic support from their funders and investors. Some providers (like [The Decelerator](#)) facilitate endings or departures from positions of leadership.

Interviewees and focus group participants told us that there was seemingly good provision for those with positional authority, i.e. the CEO or Executive Director, but less for middle managers or leaders of micro-enterprises. Some also reported that there were fewer high-quality opportunities for established leaders, dealing with the most complex social challenges.

The majority of the social leadership development providers we surveyed stated that they served leaders in the charity sector and/or social enterprise sector. Our database painted a similar picture. When offers were coded by domain (e.g. public sector, social enterprise, politics, etc.), 47% of their offers we identified were for leaders of charities or social enterprises; while 10% of the offers identified primarily serve leaders of community organising, activism or campaigning activity. Other domains identified were politics, policy and public service (22%) and cross-sector (21%).

While there is considerable diversity in philosophy and approach, some approaches commonly referenced in the survey of providers included:

- Systems leadership – interconnectedness and leading in complex, ambiguous environments.
- Understanding power and justice – challenging the status quo; promoting leadership that challenges inequity and integrates antiracism and environmental justice.
- Collective leadership – collaboration, distributed power, peer learning and collective decision-making; the idea of leaders as facilitators.
- Human-centered leadership – relational skills, empathy and building trust.
- Self-Awareness – built through coaching and reflective practice.

Approaches that were referenced by providers, but less commonly, included:

- Lived experience – working with and uplifting leaders with direct experience of the issue they aim to tackle, who are seen as best equipped to drive change.
- Creativity – promoting imaginative and visionary leadership with leadership development tools that encourage play and improvisation.
- Place-based strategies – leadership that is rooted in and accountable to a specific neighbourhood, city, or region.
- Feminist leadership – promoting the values of collaboration, community and care pioneered by women and non-binary leaders.

Despite an appetite for innovation, providers are poorly resourced to experiment and collaborate with each other.

There is no shortage of ideas for how the social leadership development ecosystem could better support Britain's leaders. New practices are emerging continuously, but not all of these go on to flourish. For example, in recent years there has been growing demand for leadership development which offers an analysis of power, builds movements and drives systemic change.

Other emerging practices include a bolder focus on equity and representation, a rise in mutual aid-style peer networks that are not reliant on institutional philanthropy, place-based leadership models, and cross-sector learning experiences.

Market dynamics, however, limit the potential of providers to innovate, renew offerings or adapt unstable business models—particularly those reliant on grants.

Providers described a field characterised by short-term funding that does not fully account for true costs, and a culture of competition for funds that discourages collaboration.

"The lack of investment feeds into anxiety around doing anything different... it shuts down innovation."

Social Leadership Development Provider
Focus Group Participant

Grant-dependent providers described having to focus their funding asks on short-term projects that follow the latest trends in philanthropy—and distract them from their core strategy.

Providers also told us of a desire to collaborate with peers more: learning from each other, coordinating to boost impact, and creating more signposting to support leaders' onward journeys.

"There's intense competition for resources... and I think that's driving a sense of fatigue."

Social Leadership Development Provider
Focus Group Participant

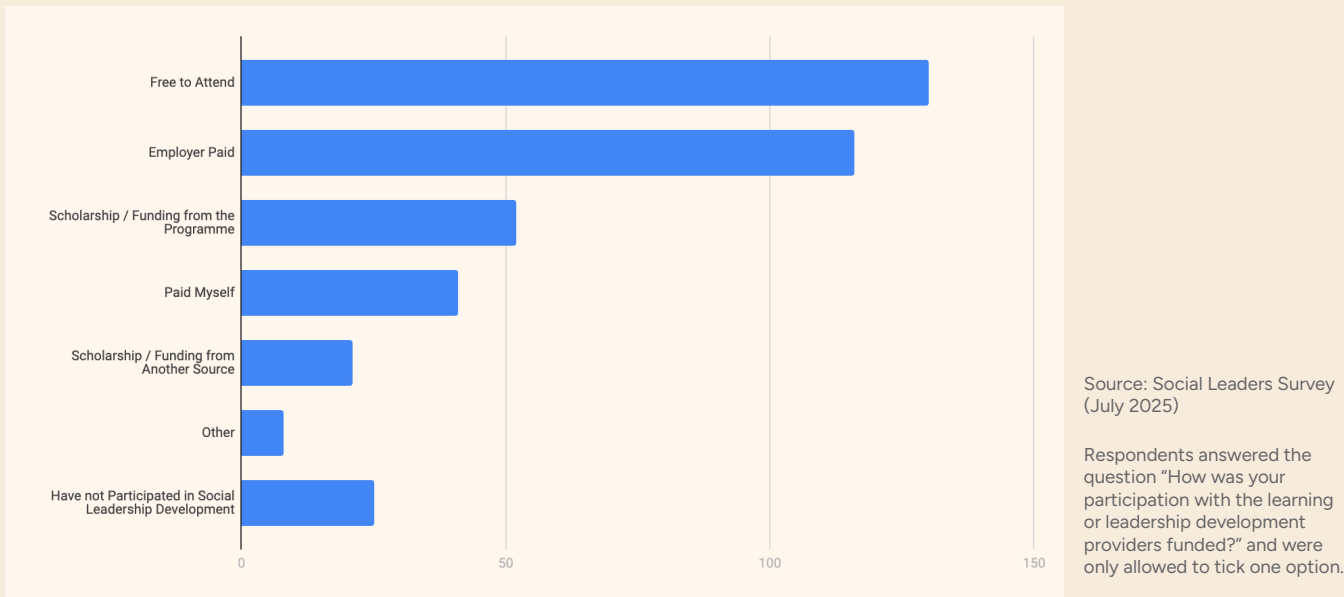
The [Collective Leadership Group](#) is one manifestation of that appetite for and commitment to collaboration. The group is formed of a collective of providers from the social enterprise sector who came together in 2020 to discuss their organisations' responses to the pandemic. Today it is a network of over 50 organisations that build capacity for leaders and enterprises aimed at driving social and environmental change, offering a forum for providers to share, learn and collaborate with each other.

Section 3: Funding Development

Unlike in the private sector, social leadership development provision is dependent on third party funding from government or foundations.

In the private sector, employers invest considerable amounts in their workers’ training and development. According to the Department of Education, the total UK employer investment through all training in 2024 was £53 billion with an average investment in training of £1,700 per employee³.

While the employer picks up the bill in the private sector, only 32% of respondents to our leaders survey who had taken part in social leadership development reported that their employer paid.



Providers told us that there was strong demand for learning and development from leaders, but limited ability to meet the costs. This gap is bridged by third parties. This might involve providers cross-subsidising social sector places with fees from private sector participants, conducting advisory work for clients with deeper pockets or, most commonly, seeking grant-funding.

Leadership development providers employ various business models

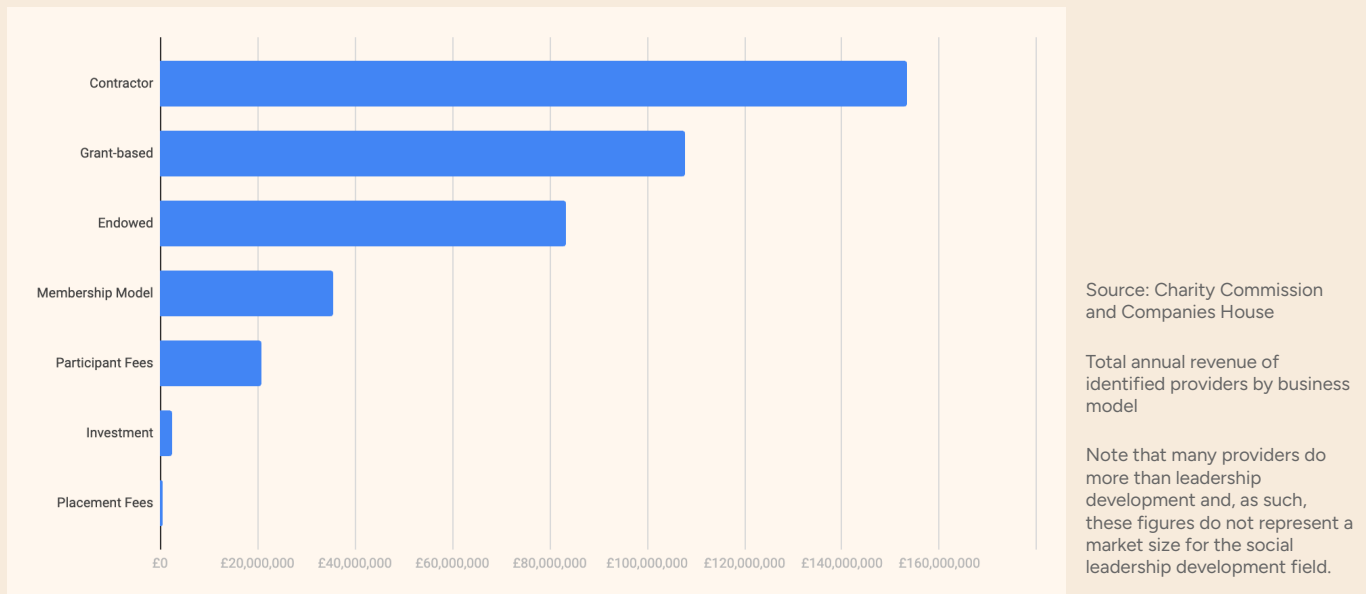
We identified seven business models used by providers (sometimes in combination):

- **Contractor** – Providers bid for contracts from governments, charities or public bodies.
- **Grant-based** – Providers fundraise from trusts and foundations.
- **Endowed** – Organisations with an endowment or ongoing corporate backing.
- **Membership Models** – Training and leadership development offered as part of a wider package of services for paying members.
- **Participant Fees** – Providers charge learners directly for participation, often on a sliding scale.
- **Investment** – Providers raise investment and take equity stakes in ventures they support.
- **Placement Fees-based** – Providers earn income from fees charged to placement hosts.

³ [Employer Skills Survey 2024](#), Department for Education, July 2024

In addition to a survey of providers, we were able to gather data on organisational revenues from Charity Commission and Companies House datasets. We cross-tabulated these figures with our own coding of providers by business model⁴.

The largest group of providers, by annual revenue, were those with the Contractor business model. According to our analysis, these organisations collectively generate an income of over £150 million. Leadership development providers whose primary income source was grants reported revenue of just over £100 million.



Providers struggle to raise philanthropic funds for leadership development

In the absence of a real 'market' for social leadership development, philanthropy has played a vital role in sustaining the field. But providers say fundraising for social leadership development is challenging.

Among those providers that have philanthropy as part of their income mix, providers consistently reported that leadership development was hard to fund.

They told us that while there is some interest in social leadership, it is often seen as less compelling than topics like climate for example. There is a sense of a zero sum game between funding leadership development and funding frontline delivery.

"It feels like there is an emerging interest from funders in social leadership development but there is a long way to go"

"I think leadership development is seen as a bit of a luxury at the moment."

"It isn't seen as urgent as service delivery work which gets funded more readily"

Social Leadership Development Providers

In interviews and focus groups, providers described expending an enormous amount of time and energy developing business models to cover the cost of their programming. In addition, eligibility criteria regarding legal status, asset lock and the scale of grantee organisation are perceived as restrictive. They can inhibit some providers' from reaching sustainability.

⁴ Note: this dataset is not comprehensive, it is illustrative.

Possible Directions

Much of the insight we have gathered has pointed to challenges and opportunities in the current ecosystem. Many of these challenges—such as low salaries across the social sector or a recent rise in xenophobic and racist hate—cannot be wholly addressed with more philanthropic investment or alternative funding approaches to social leadership development.

However, there are a number of challenges and opportunities where a concerted approach to supporting social leadership development could prove impactful. We provide some illustrative examples below:

For leaders:

- **Navigation and access:** difficulties in identifying and accessing development opportunities across what some described as an 'opaque' field.
- **Inequity:** uneven provision of social leadership development or barriers to access due to race, class, geography and other factors.
- **Prioritisation:** amidst competing pressures for time and finite resources, in some quarters there is a culture of investment in leaders being de-prioritised, both by leaders themselves but also on the part of trustees and funders.
- **Evolving needs:** an appetite for high-quality programming to help leaders address systemic problems and respond proactively to new trends and technologies in a volatile environment.
- **Crisis response:** in the face of financial pressures, the risk of burn out and even personal threats, leaders in some parts of the sector point to a need for buffers and safety nets. .

For providers:

- **Sustainability:** difficulties finding and maintaining a viable business model exacerbated by unstable grant funding with asymmetric power dynamics.
- **Experimentation:** a lack of space and support for innovation and experimentation, often as a result of thin margins and short-term funding cycles.
- **Resourcing Collaboration:** limited capacity to collaborate with, and learn from, other providers and then to direct leaders onwards to access further support.

For funders:

- **What works:** Limited insight into the relative impact or value of social leadership development and what kind of provision might be most effective for which leaders.
- **Making the case:** the need for a stronger account of the intrinsic value of social leadership to make the case (to boards, etc) for investment in tandem with other strategies for social impact.
- **Strategic alignment:** limited collaboration around social leadership, with important funder initiatives often operating in parallel rather than being joined-up.

Research Methods

We conducted two surveys that are referenced in this report.

Survey	Notes
Providers Survey	Conducted in June 2025 and received 28 responses, sharing a total of 43 'offers' (discrete courses, programmes or services for social leaders) Full Analysis.
Leaders Survey	Conducted in August 2025 and received 262 responses. Survey respondents were ethnically diverse and broadly representative of the national population; they were based across the UK, though those based in London were overrepresented in responses; and the age range of participants was wide, with the median age of a respondent being in the 40s. Full Analysis

Data on providers was collected by desk research and interviews in order to:

- Build a database of 228 social leadership development provider organisations and 258 'offers' – discrete training courses, fellowships or learning communities.
- Gather data on the annual number of participants for 63 of 228 leadership development providers, and 91 of 258 leadership development 'offers'.
- Categorise providers by *domain*, leadership development *vehicle*, and *business model*.

We also made use of two additional datasets:

Dataset	Notes
Charity Commission	A data set that pulls the latest financial information from the Charity Commission for those providers and funders that have a charity number. For providers, "Annual Income" has been used as a proxy for size.
Companies House	A data set that pulls available financial information about companies, for those providers and funders that do not have charitable status.

None of these datasets is perfectly representative but, collectively, they give a good indication of the size and the shape of the field in broad terms.