



ADVANCED BOARD LEADERSHIP AND CHANGE MANAGEMENT

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**ADVANCED TRUSTEE LEADERSHIP AND FIDUCIARY EXCELLENCE
PROGRAMME**

DATE: 26th – 30th January 2026

VENUE: Pride Inn Paradise, Mombasa

GOVERNANCE . TRAINING . EMPLOYEE BENEFITS . TECHNOLOGY

EXPECTED OUTCOMES

1. Understand leadership's role in driving change.
2. Explore advanced board competencies for transformation.
3. Learn strategies to manage resistance and build buy-in.
4. Apply emotional intelligence in governance.
5. Sustain change through culture and evaluation.

WHY CHANGE MATTERS

- ❖ **Dynamic pension landscape: regulation, technology, stakeholder expectations.**
- ❖ **High failure rate of change initiatives.**
- ❖ **Board's fiduciary duty during transitions.**
- ❖ **Quote: "Leadership is the engine of change."**

FOUNDATIONS OF CHANGE LEADERSHIP

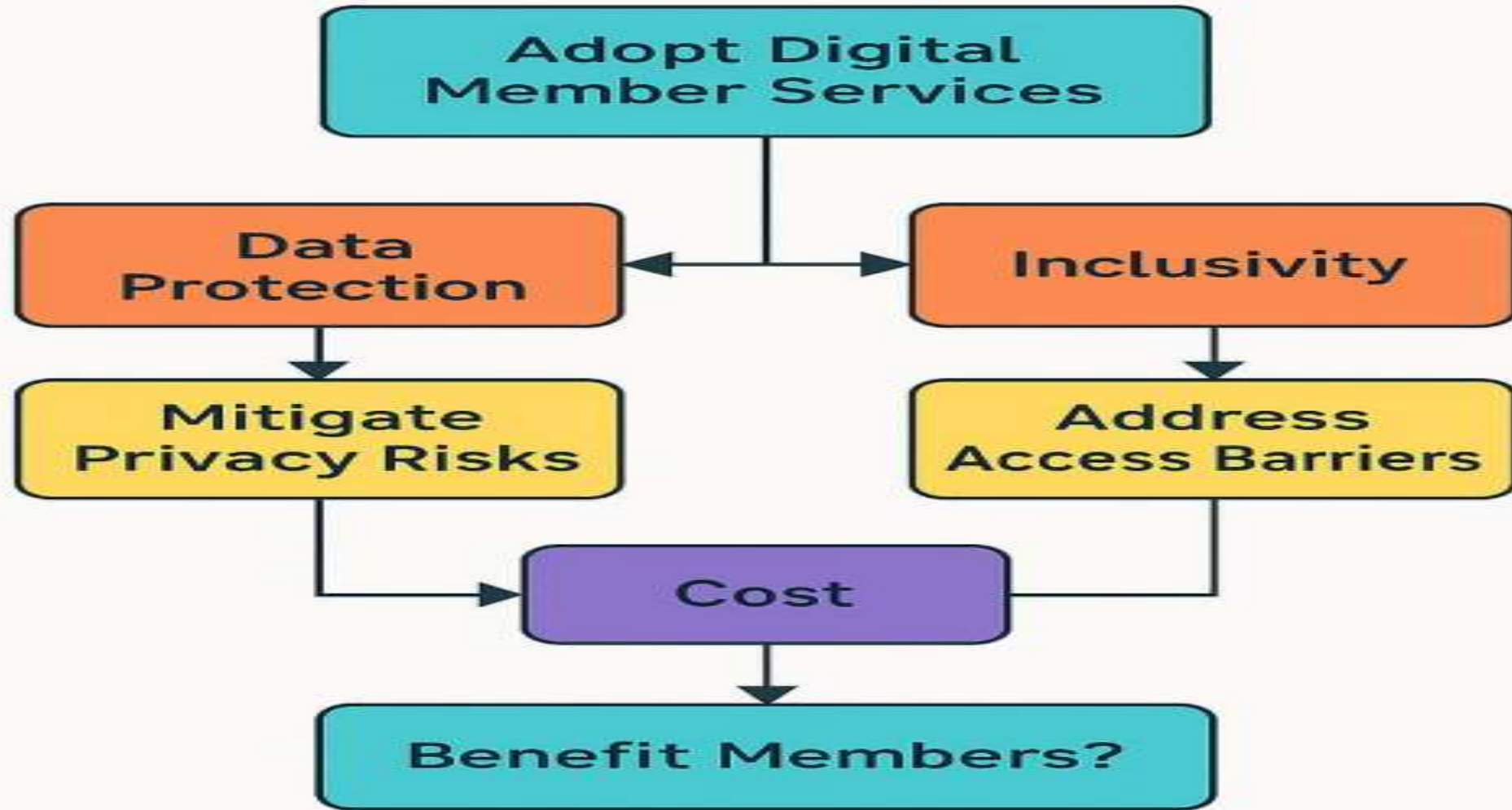
- ❖ **Vision setting and strategic direction.**
- ❖ **Governance alignment with transformation goals.**
- ❖ **Risk and compliance oversight.**
- ❖ **Accountability and transparency.**

ADVANCED BOARD LEADERSHIP COMPETENCIES

<p>Systems Thinking seeing interdependencies</p>	<p>A holistic approach to leadership that views the organization as an interconnected system.</p>
<p>Adaptive Leadership flexibility in uncertainty</p>	<p>The ability to lead through uncertainty by adjusting strategies and empowering teams.</p>
<p>Ethical Anchoring fiduciary responsibility</p>	<p>Grounding decisions in fiduciary duty, transparency, and member-first principles.</p>
<p>Strategic Stewardship beyond oversight</p>	<p>The board's proactive role in shaping the long-term direction, resilience, and ethical integrity of an organization.</p>

CASE STUDY 1: Digital Member Services

THE CHANGE	A pension scheme is considering digitizing member services eg. Statements, queries, onboarding.
THE CHALLENGE	Trustees must evaluate: <ol style="list-style-type: none">1. Data Protection2. Cybersecurity3. Inclusivity4. Cost
THE DECISIONS	<ol style="list-style-type: none">a. Mitigation Strategiesb. Stakeholder Engagementc. Board Alignment



MANAGING RESISTANCE

Resistance is natural, not failure.

Strategies:

- ❖ Transparent communication.
- ❖ Early stakeholder engagement.
- ❖ Psychological safety for dissent.
- ❖ Kotter's 8-Step Model adapted for boards.



CASE STUDY 2: Adoption of AI Driven Compliance Monitoring

Scenario:

Your Pension Scheme is considering implementing AI driven compliance monitoring to improve efficiency and reduce human error. The Trustees must decide whether to approve this initiative

Group 1: Arguments for

Group 2: Arguments against

Tip: consider how the decision would affect different stakeholders.

EMOTIONAL INTELLIGENCE IN LEADERSHIP

- ❖ What is Emotional Intelligence:
- ❖ Self-awareness – biases toward change.
- ❖ Empathy – member/employee anxieties.
- ❖ Relationship management – trust-building.
- ❖ EI as a differentiator in successful change.

WHY IS EMOTIONAL INTELLIGENCE SO IMPORTANT?

“...Success in Business today is 15% Expertise and 85% Emotional Intelligence....”

Harvard School of Business

“The Emotions of man are stirred more quickly than man’s intelligence”

Oscar Wilde

WHY IS EMOTIONAL INTELLIGENCE SO IMPORTANT?

SELF-AWARENESS

Leaders with self awareness understand their strengths, weaknesses and triggers. They do not let emotions control their decisions. This helps them stay grounded and genuine.

EMPATHY

Empathetic leaders go beyond surface-level listening. They actually try to understand what their team members are going through, creating an environment of trust and support.

SELF-REGULATION

Strong leaders do not react impulsively. They pause before responding, allowing them to handle challenges calmly and make thoughtful decisions under pressure.

SOCIAL AWARENESS

Emotionally intelligent leaders pick up on unspoken cues. They are attuned to the team's morale and can sense when things are off, addressing issues before they escalate.

MOTIVATION

They are driven by purpose, not just personal gain. This type of leader brings energy and focus to their goals, inspiring the team to stay committed even during tough times.

CONFLICT RESOLUTION

Emotionally intelligent leaders tackle conflicts head-on. They address issues directly and fairly, promoting open communication and maintaining team unity.

EMOTIONAL INTELLIGENCE REFLECTION

Objective: Strengthen self awareness and empathy in board leadership

Instructions:

1. Individually reflect on the following questions
2. Write down your answer
3. Share one thing that surprised or that you realized

Reflection questions:

- How do I personally react when faced with resistance?
- Do I listen actively in board debates?
- How do I manage conflict constructively?
- What is one EI skill that I can strengthen to improve my leadership?

Note Down:

My EI Strength is

My EI growth area is

Action step

Challenge: momentum fades.

- Best practices:

- Regular board evaluations.
- Integrate change metrics into strategy.
- Celebrate milestones.

REFLECTION:

Take a moment to reflect.

1. What individual/ group commitments will you make as a trustee or as a board to foster sustainable change?
2. How will these commitments be tracked and evaluated?

These should be practical steps to strengthen your leadership in upcoming changes.
Share with the group.

Leadership drives change success.

- ✓ Boards must be adaptive, ethical, emotionally intelligent.
- ✓ Sustaining change requires embedding it in governance culture.

"If you are still doing things the same way you did five years ago, you are doing something wrong."

– Jack Welch

REVISITING THE EXPECTED OUTCOMES

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