Clore Leadership-AHRC Online Research Library Paper

Secrets of Success: Older female workers and their post-institutional lives

Author: Kathleen Soriano

Supervisor/s: Virginia Tandy,

University of Manchester

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SECRETS OF SUCCESS
Report for the Clore Leadership Programme
Kathleen Soriano, February 2023

How do older female workers, previously in leadership positions within museums, libraries and galleries, approach building a career post institutional life?

What sustains them and supports their success, and what led them to make the change in the first place?

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INTRODUCTION

> *I have never liked the word* **retirement***. It doesn't feel like a modern word to me.*
> *I've been thinking of this as a transition ... Maybe the best word to describe what*
> *I'm up to is* **evolution***.*[1]
>
> Serena Williams, 2022

When, in May 2022, the Clore Leadership Programme issued an invitation to Clore Fellowship alumni to submit proposals for further research that was of practical relevance to their area of work, and that would be of public interest and benefit, it provided the perfect opportunity for me to consider the idiosyncrasies of my own career path and experience in the light of the experience of other women with similar histories in the sector.

After more than 35 years of working within large-scale, visual arts organisations, many of those in senior leadership positions, I set up my own business in April 2014. With no previous experience of working for myself I established a Limited Company and a thriving arts advisory business, as well as running a successful career as an arts broadcaster alongside. In so doing I have found that others are keen to know what the secrets are to building a successful independent life away from the museums and galleries that have so 'protected' us over the last decades. While it is easy for me to offer up my own framework as a model, I am aware that there are many others out there who have made similar departures from full-time employment and was interested to understand what has worked and what has not worked for them, to learn more about the range of activities undertaken, as well as the ways of living and working that independent workers from the cultural sector have developed in recent times.

In the early 2000s several senior leaders, many of whom were women, stepped away from their full-time employment, however many of them had no intention of calling an end to their time of being useful to the profession. Quite possibly the first or second generation of professional women who have 'retired' yet continue to work, this shift in attitude and interest in continuing to be useful, usually for financial recompense, required further study. Of further interest was the parallel development of coaching and facilitation skills, facilitating a more enabling culture, there to support organisations and individuals, both personally and in their institutional lives. Ultimately this research aims to identify the elements involved in building what is in effect a second career for many.

As the Office of National Statistics (ONS) reports currently show, older generations of female workers have been leaving the workforce and their organisations in dramatic numbers, particularly since the pandemic. *People Management* magazine recently reported that 'this trend isn't so much driving a 'great resignation' as a 'great early retirement' with figures from the ONS showing that record number of women aged over 50 are now retiring earlier than expected.'[2]

According to the ONS report dated 14 March 2022, professional occupations saw the largest volume increase in the flow of workers aged 50 to 70 years to economic inactivity in 2021, compared with pre-coronavirus. Full-time workers were the largest driver of increased flows to economic inactivity for 50- to 70-year-olds and of those, workers with a degree or equivalent saw the largest increase in movements to economic inactivity. The report went on to note that the pandemic led to a wave of resignations and early retirements with 3 in 5 over-50s leaving the workforce sooner than planned.

Alongside this, statistics tell us that 50% of the working population will be over 50 from 2030, by which time under 60% of the total population will be of working age. It is no surprise therefore that Jeremy Hunt, Chancellor of the Exchequer, chose to announce a series of incentives planned to encourage older people back into the workplace on 27 January 2023. However, his observation that this particular demographic are currently on the golf course would be shown to be inaccurate in relation to the group taking part in this study.

A 2021 Department for Digital, Culture, Media and Sport (DCMS) report recorded that almost one third of the creative industries workforce is made up of the self-employed, double the rate across the UK more broadly. Since 2008, 45% of all UK employment growth has come from self-employment and

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[1] 'Serena Williams Says Farewell to Tennis On Her Own Terms – And In Her Own Words', by Serena Williams, as told to Rob Haskell, *Vogue*, August 9, 2022

[2] How to stem the tide of senior females retiring early, *People Management* (8 July 2022)
https://www.peoplemanagement.co.uk/article/1792573/stem-tide-senior-females-retiring-early

it is professionals who represent the biggest share of the UK gig economy, with under 30s being the most rapidly growing sector, followed closely by the over 60s. Some do gig work as fill-in between full-time jobs but more are deliberately choosing it (Eden McCallum study: 59% of independent consultants saw freelance as a deliberate choice post-financial crisis (2008))[3].

This report takes the form of an intuitive enquiry and considers a group of female individuals from the creative sector who are part of that current exodus from the workplace, looking to understand their motivations for departure as well as their current activities. They have all developed deep institutional expertise and knowledge across a range of functions over their time as leaders in full-time employment (ranging from 20-45 years). All have stepped away from their organisations with the intention of continuing to work in, or be useful to, their sector in some form or other. As Chris Phillipson writes,

> 'retirement is now a contested institution in the 21st century, fragmented across different pathways and transitions affecting people in their fifties and sixties.'[4]

The study around extended working lives is a recent development that has grown in significance, even since this research began. While this study endeavours to identify a pathway or range of pathways for others who will want or need to take this route in future, as well as examining motivations and drivers for such change, the models are not yet there to test this group against or to place them within. Hopefully, the information gleaned through this series of discussions that form the basis of this report will contribute to thinking around this issue.

METHODOLOGY AND KEY FACTS

Over a period of 3 months (November 2022-January 2023), 17 women from the charitable, cultural sector, from across the UK, were identified as having the required characteristics in relation to the focus on this study and were then interviewed by me. Individuals were chosen based on the author's knowledge of the sector but also on recommendations from groups such as Museum as Muck, Space Invaders, Women Leaders in Museums Network, SHIFT, and individuals with connections to the sector. Interviews were undertaken anonymously and moved through a series of crafted questions (see Appendix 1) that interviewees had sight of in advance.

Qualifying characteristics included having been Director of a cultural organisation, or Director of departments within an organisation, and Executive Team member; being over 40 years of age with a minimum of 20 years' experience in the sector; working independently for a minimum of 1 year at the time of the interview; and female.

All interviews took place on zoom and ranged from an hour to just under two hours. While guided by the questions that had been formed into a carefully structured sequence, the interviews were semi-structured, allowing room for conversation to develop freely around the subject areas. Interviews were recorded and detailed notes were taken during the interviews themselves. While the first few were fully transcribed, directly from the recordings, the process developed into one of detailed notetaking rather than transcription.

The analysis of the information gathered was approached in two ways. Firstly, specific headline information was collated from across the interviewees related to age (now and at point of departure), income, business status (sole trader, limited company, VAT registered), etc. The second stage of analysis involved a lateral consideration of answers to specific questions so that a broad understanding of responses from the sample was taken across the study, rather than focussing on individual answers to the questions in their entirety. This approach served to highlight patterns, common themes and a sense of hierarchy of particular influences and experiences (eg reasons for leaving institutional work) which are reflected in the report.

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[3] How to stem the tide of senior females retiring early, *People Management*, 8 July 2022
https://www.peoplemanagement.co.uk/article/1792573/stem-tide-senior-females-retiring-early
[4] *'Fuller' or 'extended' working lives? Critical perspectives on changing transitions from work to retirement* by Chris Phillipson, published online Cambridge University Press, 2018, p1

In addition to the interviews, a study of relevant podcasts, websites and literature related to the subject area were reviewed (see Bibliography, further research resources and literature) and served to support many of the learnings from the interviews themselves.

From the 17 interviewed, 9 were previously Directors of their organisations and 8 had been senior executives with responsibility for large departments. Working independently from 1 to 17 years, they had previously been in the full-time employment workplace for 20 to 45 years. Of those, 3 (18%) left the workplace in their 40s, 9 (53%) in their 50s and 5 (29%) in their 60s. The majority, 10 (59%), came from museums and galleries with 1 each (6%) from commercial galleries, libraries, arts funding, heritage, dance and film. Only 4 (24%) interviewees were from diverse backgrounds which reflects the lack of diversity at senior level within the cultural sector. While this is a serious and important issue, it is not a specific area of focus in this report.

Only 6 (35%) were currently working internationally, although the appetite to develop further opportunities was cited by many. All but one of them worked from a home office, and of the 17, 6 (35%) undertake coaching as a distinct part of their portfolio with 10 (59%) having a connection to the Clore Leadership Programme (Clore Fellow, short course participant, etc) that has supported this report.

Given my own career as director of an independent museum, and senior director within a national gallery, a lack of critical distance from this topic could be justifiably presumed. However, this very experience, coupled with my inside knowledge of the profession, enabled me to access a range of women who were willing to speak openly to me. Furthermore, it was through drawing on my personal experience that I was able to frame a set of questions that drew out important issues. While my own responses to the questions posed are not included in this study, my experience of working at a senior level within the cultural sector for 30 years, and subsequently as an independent for the last 8, brings tacit knowledge and an empathic approach to the way in which this research was conducted.

FINDINGS

As Chris Phillipson, Professor Sociology & Social Gerontology, Manchester Institute for Collaborative Research on Ageing, University of Manchester, pointed out in his 2018 study -

> 'Research on older workers and retirement has yet to adjust fully to an environment influenced by a combination of demographic change, technological developments and economic recession. A key dimension to the changing relationship between ageing and work is the tension between policies to extend working life and the increasingly fragmented nature of late working life, with the emergence of varied transitions, including: bridge employment, second/third careers, part-time working, early retirement and other variations.'[5]

In his report he commented on the view that 'retirement had become a "lost" institution' given the raising of pension age, going on to suggest that it might be argued that 'retirement rather than being "lost" was "evolving" in new and distinctive ways'.[6]

Arthur Brooks, Professor of the Practice of Public Leadership at Harvard Kennedy School tells us that,

> 'We're at the vanguard of the ideas economy. If we have a business to do with ideas there's a whole industry dedicated to telling us that we can work longer ...'

He goes on to admit that decline is a normal part of living but that as cognitive abilities fall (fluid intelligence), crystallised knowledge increases based on the 'stock' that we have rather than the flow of knowledge – 'wisdom', recognising this reinvention as the second curve.[7]

Chip Conley, who set up the Modern Elder Academy in the US and wrote *Wisdom at Work: How to Reinvent the Second Half of Your Career* in 2018, argues that a new kind of elder is emerging in the workplace, where we now have 5 generations working together for the first time. These elders are appreciated for their relevance and ability to apply wisdom to the modern world, yet 'they are as much an intern as they are a mentor' ... learning as well as sharing what they know.[8]

In her TED talk, the octogenarian actor and activist Jane Fonda not only tells us that older women are the largest demographic in the world but argues that rather than seeing the journey of life as an arc that rises in mid-life then 'slumps into decay', that we should see it as an ascending staircase with the gaining of 'experience, wisdom, wholeness and authenticity.' She goes on to argue that women in this third act, as she refers to it, get better, happier.[9] The 17 women interviewed for this study were certainly more content in their independent roles - in control of their own destinies, earning, and finding enough interest and learning in their projects to sustain them.

As a growing field of study, behavioural or business model comparisons are hard to draw out, but what is apparent is that the individuals considered in this report have developed a way of working that comes immediately out of their institutional experience and for all but a few, their independent lives see them offer up those skills and expertise in which they have confidence, with only a very small number building businesses in new fields and with diversified income streams.

The path from institution to independence

Taking the step

Of the 17 women interviewed, 14 (82%) had left their organisations of their own choice and 3 (18%) were made redundant. The majority had worked consistently within full-time employment, whereas 3 (18%) had moved in and out of organisations into occasional independent working, two or even three times during their career.

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[5] Ibid

[6] Ibid

[7] Arthur Brooks – You Tube https://www.youtube.com/watch?v=WU2XajpRdgM

[8] *Wisdom at Work: The Making of a Modern Elder*, Chip Conley, October 2018 https://www.youtube.com/watch?v=XPvjm7B5iew

[9] https://www.ted.com/talks/jane_fonda_life_s_third_act?language=en

The reasons cited for departure were varied but the majority quoted a level of disillusionment with the senior leadership (largely male) in their organisation – either at Board level or a direct superior executive – with a lack of decision making and strategic thinking being foremost. Some referenced abusive work situations either in relation to workload, individuals or sexism and racism. For many of these women, with a minimum of 20 years' experience in the business, there was no doubt that a sense of knowing how things should and needed to be done that added to this frustration. Coupled with a reassessment of work-life balance at a mid-life period, with some being close to conventional retirement age, a range of good reasons to enact change were present for all.

An instinctive sense of it being time to carve out another path and the fact that seniority had taken them further away from their original passions contributed, with a desire to escape repetitive institutional bureaucracy, and for some an element of burn-out (particularly for those from diverse backgrounds) encouraging their decision. For a few, it was that they felt that they had done what they needed to do, and what they were able to do, within and for their organisations.

It is also important to remember that after so many years of experience, many of these women had developed a built-in appetite for bravery, innovation, calculated risk-taking and swift decision-making. One for example, prior to making the decision to leave, made a list of the services that she could provide, and another of people that she knew she could go to for work. This resulted in two lengthy lists which led her to recognise that if only 5% of her contacts took up 5% of the services she could offer, that she could survive financially in an independent world.

Explicitly identifying expertise, specialisms and niches in which they could operate, or offer services, was an important factor for many. Areas identified from within the study group included:

- leadership and training
- diversity and leadership
- organisational culture, transformation and change management
- capital projects
- placemaking, cultural strategy, policy, vision, business planning
- marketing and communications
- fundraising
- interpretation, public engagement and community
- artistic direction, curatorial, collections, exhibitions
- production, project management
- literature, libraries
- film
- dance
- heritage, archaeology, conservation, environment
- mentoring, coaching

Over half of the study group left their organisations with work already in place, with some designing an incremental departure so that they built up their independent practice prior to leaving. While many had intended to take a period of leave before starting their independent working lives, only 7 (41%) managed to do this and escape the pressures of immediate freelance projects.

In this group, while the pandemic did have an impact on workload and income it did not influence a departure from full-time employment, as the majority were already working independently. However, as reports on the subject of women departing from the workforce in their 50s and 60s will corroborate, at least 8 (47%) of those interviewed for this report stated that factors influencing their departure included personal illness or duties of care to elderly relatives.

Making the step

As Lynda Gratton and Andrew Scott *wrote* in their 2016 book *The 100 Year Life,* 'If you want to work for ever, having your own business is a way to ensure that you can.' For many of the women in this study – whether they call themselves freelance, independent, solopreneurs or small business owners –

they are doing just that. A September 2021 *Hubspot* article recorded that 82% of independent workers report feeling happier working alone than they did for traditional companies.[10]

In redefining oneself post-institutional life, many of those interviewed chose to refer to themselves as freelance, a smaller number as independent with only two choosing to define themselves as running their own business. The apparent reticence to associate oneself with the idea of a business after so many years of working within complicated organisations may be behind this, but it perhaps reflects a level of self-effacement and humility related to the apparent smaller scale of what one does now, as compared to previously in their careers.

Organisational titles such as Director, CEO, CFO, etc carry a weight, and suggest expertise and authority. The portfolio nature of many of the study group's post-institutional careers can, as most acknowledge, make it difficult to describe what one does in a few words. Consequently, titles range from -

> Arts Consultant to Cultural Entrepreneur, Consultant & Mentor
> Museum Consultant & Advisor to Museums & Heritage Consultant
> Non-Exec to Portfolio Career
> Coach to Management Consultant

These titles were often felt to be inadequate, or open to misinterpretation, when attempting to describe the full range of what the individuals were able to offer. Where they strove to clarify that range, longer descriptions such as the following were referenced:

> 'Portfolio career – strategic consultant in art, science, ecology and technology for foundations, arts organisations, higher education arts institutes, curator, producer, writer, mentor of young leaders'
> or
> 'Management consultancy within the cultural and creative industries, and leadership development'
> or
> 'I work as a strategic consultant, facilitator and coach for culture, heritage and creative industry organisations helping individuals, teams and organisations plan their future and fulfil their potential.'

Possibly, in these times when business cards are no longer de rigueur, the two- or three-word title is no longer required but the inability to describe the full breadth of one's responsibilities and services remains a frustration for many. For most in this study group, their names alone and reputations in their chosen fields would probably suffice.

Clearly the value of organisational experience, and at a senior level, is key to the success of independent workers, pivotal even, as recognised by the entirety of this study group who were largely confident that they would not have had the success as independents that they had enjoyed without the experience, the opportunity to benefit from large training budgets in their previous roles, and access to broad and creative networks.

Credit was also given to the chance to develop strategic, big picture and political thinking in working for large, complex organisations, and the consequent skills learnt, such as pragmatic problem solving, quick, instinctive decision-making, managing upwards, holding a vision, discipline and focus, as well as refining specialisms and expertise. Working in a large organisation also meant that these individuals were clear on their abilities and the value of different thinking, the importance of specialist expertise and team working so, in their independent working, are not frightened of bringing in others to support them in areas where they feel lacking in a specific skill. All characteristics maybe of a more mature and experienced professional.

More importantly, considering their future independent careers, their professional credentials were boosted by the status and reputation provided by their previous employer, and relationships with other organisations as represented on CVs. This acted as a hefty endorsement in their new independent

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[10] https://blog.hubspot.com/sales/solopreneur

working, making them more attractive as a potential Board member or contractor. That credibility also made them more relatable to senior clients who tended to take them more seriously as there is a genuine understanding and experience of the pressures of the job. Ultimately, one of the prime benefits in a world of cultural consultancies was that this group of women had, in the words of one -

> 'walked the walk and talked the talk – I wasn't just a consultant who had only ever consulted.'

Furthermore, those years of experience provided considerable confidence to many that they were providing valuable and accurate guidance to clients.

The process of transition

Less than a quarter of those interviewed found the transition to independent work difficult. Most saw it as a natural progression and were ready for this next step. For those who had experienced the shock of redundancy there was a natural impact on confidence and self-esteem as they struggled to work out how to be a consultant (juggling clients, providing one's own IT and diary support) and what their business might offer, although this was not limited to those who had been made redundant. Others noted a sense of impostor syndrome in selling themselves as they no longer had the full weight of an institution behind them, finding it awkward to promote themselves as individuals. For some, there was also a sense of loss of the community of the workplace, but most went on to find 'team' in the work that they developed post-institutional life.

In their book, *From Work Life to New Life,* Mike Mister and Rebecca Hill identify the options considered by professionals when contemplating what they refer to as their 'encore' career[11]

- Taking on board roles
- Applying experienced entrepreneurship
- Making an impact – mentoring, volunteering, investing
- Becoming an interim executive
- Becoming a consultant
- Going plural – creating a portfolio
- Retraining – preparing for a new path
- Asking "is it okay to retire retire" (is it ok to do nothing?)

This process of transition has been referred to as psychological and social by Herminia Ibarra, Charles Handy Professor of Organisational Behaviour at London Business School[12]. She goes on to elucidate that where change is moving from a to b, transition is the process of moving from one to the other while the 'other' is still in development. That transition is non-linear, with views and choices changing along the way, particularly given that it is undertaken alone, outside of an institutional framework, often with no pattern to follow, a range of paths that could be taken and a lot of unknowns. It is therefore a process of experiment and learn, more iterative and instinctive in its progress so that the road to independent success is one where risk-taking, confidence, maturity and experience are key. This may go some way to explaining the more organic way in which most women interviewed for this report established their new ways of working.

For most, the largest issue was around trusting that work and money would come, especially for those who were the main or sole breadwinners (13/76%). This was followed closely by the lack of a long-term view, with work often not been seen beyond 4 months, a difficult position for many who were used to 3- or 5-year plans.

In his YouTube presentation, Harvard Professor Arthur Brooks references 'The Law of Psycho-Professional gravitation – that when you go up high (in your career), you're going to notice (more) when it's not there anymore.'[13] However, while 11 (65%) of women interviewed acknowledged the shift

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[11] Mike Mister and Rebecca Hill, *From Work Life to New Life: Rewriting the Rules of Retirement for Smart Professionals* (2022), p33
[12] https://www.london.edu/think/time-to-reinvent-your-career
[13] Arthur Brooks – You Tube https://www.youtube.com/watch?v=WU2XajpRdgM

in status following their departure from their institutions, the majority found that it did not really concern them, with many commenting that in some ways they felt that their status was higher now as they were being judged as themselves – their work and what they stand for - rather than as their former institution.

Most found ways to manage the change in status, with many finding that their work on charitable Boards helped. All but 2 in the study group play an active role in voluntary charitable Boards, committees or advisory groups, with a number mentoring or coaching individuals that they wanted to support without charge. Importantly, 1 member stated that they could not afford to support this type of pro-bono activity within their portfolio. For the majority the value in relation to status, profile and network-building was noted; however most went on to comment that the activity itself was also rewarding and educational, keeping you up to date with new ideas and meeting interesting people, as well as satisfying their desire to 'give back'.

Time commitments were estimated at between full-time (1 individual:6%) and 1 day a month (3:18%), with the highest number (5:29%) suggesting that it took up 2 days a month on average. However, given the number of Boards etc that members of the study group took part in, it is likely that the actual time involved was underestimated, with many commenting that they would 'read the papers in the evening' or on the train, thereby not framing it within the working day, or the context of potential earning hours.

In setting themselves up as independent workers, this study group were notable for doing very little. While many considered creating a website, less than half did, with many of those who had finding that it did not ultimately drive work, when compared to the power of word of mouth. Hardly any considered creating a logo for their new business. The key preparation for independent life focused on updating their CVs, utilising elements of their institutional work that they had created or been involved in (eg contact lists, contract templates), producing a business card, and creating stationery templates and selecting fonts, colour palettes, etc, with a few seeking out professional indemnity insurance.

Many applied themselves to social media, particularly LinkedIn, and a few invested in computer or online business training, or secured the services of an accountant or bookkeeper, others setting themselves up with an income projection spreadsheet.

Only 5 (29%) sought out a coach to support them in the transition, with one individual employing a marketing expert to help identify the services that they might offer. Similarly, only 5 (29%) created a business plan.

Certainly, this group were fully aware of what one is supposed to conventionally put into place (business plan, website, etc) but the fact that very few did possibly speaks to their experience and knowledge, as well as to their appetite for risk as leaders, and as leaders used to dealing with high-level issues, moving fast, making educated and carefully calculated choices along the way. Here, the value of instinct and experience in knowing one's areas of expertise as well as business interests is paramount, but of course what it really brings into focus is the vital importance of networks and how 20-45 years' worth of carefully building and nurturing those contacts has a significant impact on future business. Unsurprisingly therefore, all were aware of the need to nurture their networks and to transfer them, where possible, to their new working lives.

Developing a business

Those interviewed were clear that it was through networks that work comes, and that the care of those networks was the most important thing that one could do to protect and grow your business and income. Many commented that their entire post-institutional working life was based on networks, or that all their work came through this route – something aided no doubt by having worked in the sector for a considerable number of years and encountering a large number of people. Maybe, not so coincidentally, the study group universally commented on the fact that they take pleasure and energy from engaging with others, enjoy connecting people and building relationships, recognising too that this is often how work follows, although it may be 'some years after that first cup of coffee'.

Issues were noted about the considerable unpaid time involved in nurturing and pro-actively developing new networks, however most recognised that it was essential in relation to learning, identifying what services might be required and by whom, as well as effectively being a form of marketing.

In building their business, most admitted to having an organic approach that was more reactive than proactive, with a strong sense of being strategic in what they would not take on. At best they activated their networks, used social media as a tool, and worked hard to maintain their profile and presence at cultural sector events. However, less than half of the study group thought actively about brand, although there was clearly an innate understanding of it and its direct connection to personal reputation, respect, values and integrity.

In considering their drivers, which one could argue are associated closely with brand, most referenced a love of the arts and cultural sector itself as well as the opportunity to support and work with interesting people, especially cross-generationally, and an appetite for change, innovation, and new ways of doing things. The intellectual challenge of being a consultant, with its related learning and need for problem solving was also cited as helping with self-improvement. After many years of leading their institutions, it is maybe no surprise that for this study group, a key driver is to be useful, to make a contribution and a difference so that they can take pleasure in their work, working hard and feeling valued while remaining actively engaged. Naturally, earning an income as a means to enjoy life and family was also noted as a key element in influencing their commitment to developing their business.

Moving out of institutional life for many has resulted in a nervousness about keeping up to date with new methods and thinking in the sector, especially for older members of the group and specifically in relation to terminology around diversity and inclusion. In order to ameliorate this issue, the study group variously used their Board memberships, clients, and work projects to develop learning and skills. More informally, they kept up to date through reading and podcasts; conference and webinar attendance; visits to museums, theatre, artist studios; memberships eg Museums Association, ICOM, Shift; media eg Arts Professional, e-newsletters; social media; and through spending time with younger people and artists.

While all in the study group offer their services around areas of expertise developed over many years of institutional working, a small number chose to develop a new skill in professional coaching. Of the group of 17, 6 members (35%) now offer coaching as a particular strand of their business. As a distinct activity, it is worth noting that the majority of the group regularly mentor individuals, sometimes for a fee, more often than not pro bono.

Another string to bows developed by this group is in taking up a position as an associate within consultancies working in the cultural sector. Of the study group, 6 (35%) work regularly with such consultancies, with 3 of that group being associated with more than 1 consultancy. Benefits quoted included the opportunity to learn, the sense of team and peer support when working on shared projects, and their proactive approach to seeking work opportunities as an advantage to the independent individuals.

Running the business

In a post-pandemic world, the physical location of one's business is of less relevance and similarly, with this group of women their work ranged far from their home base. Primarily work was focussed in the UK and with UK-based organisations, with 6 (35%) working internationally and many interested in doing more abroad if the opportunity were to present itself.

Perhaps unsurprisingly after so many years of leading large numbers of people in big organisations, most who took part (12 individuals: 71%) chose not to employ others, revelling in the freedom and lack of responsibility for others. As an alternative, many of them preferred instead to identify the skills that they needed to support them in specific projects and to then find a partner with whom to work, paying simply for the task rather than supporting a PAYE employee.

Working alone, especially when you are the business, can often create difficulty in managing workload. However, the majority of this group were good at time-management, organised, disciplined

and used to planning the effective use of their time after their years of institutional work, with only the odd interviewee admitting that they worked all the time, but most having a greater confidence in knowing when to say no. As one interviewee commented,

> 'one of great things about being freelance is that you realise that time is money',

As referenced previously in this report, a commitment to work is rarely more than 4-6 months ahead with at least one interviewee reporting that they had as much work as they wanted and another that the right amount always seems to come organically. Driving new work and marketing is on the whole informal and through networks, personal contact and conversation for this group. While some use social media, and especially LinkedIn, as well as the occasional newsletter or through their websites, the majority are not consciously applying themselves to driving business.

Over three quarters of them invest in business and personal development through coaching, action learning sets, therapy, digital/computer training, training opportunities through consultancies, reading of books, journals and attendance at conferences, although most felt that they needed to do more. One was taking advantage of local authority opportunities for SME's.

Financials

In examining the income and attitude to income within this group, it was clear that those who were over 60, and who had benefitted from final salary pensions, often behaved very differently to those who were younger. While still purpose driven, those under 60 are far more economically driven in their approach to work, even though a number of them will also benefit from final salary pensions in future. As mentioned earlier, of the group, 13 (76%) are main or sole breadwinners, with over three-quarters of them having to work for financial reasons so that it is unsurprising that 11 (65%) of them confirmed that they do worry about money.

Just over half of the study group were aware of how much they needed to earn after leaving full-time employment, with under half taking financial advice at the time of departure. This might suggest a level of confidence in what they might be able to earn as well as an energised appetite for change and risk. Since leaving, less than a quarter have taken financial advice with only 5 (29%) continuing to pay into personal pensions, despite the tax incentives to do so.

Those interviewed provided either a range of income over 3 years or specific figures, with 3 individuals abstaining. From the information gathered, annual income to the businesses was determined as ranging from £6,000 to £185,000, with 3 individuals (18%) earning on average £6,000-20,000, 4 (24%) in the £30,000-50,000 range, 5 (29%) in £70,000-120,000, and 2 (12%) within £125,000-185,000. While these figures are not exact, nor necessarily directly related to salary or dividends taken, they do nonetheless give a broad sense of income range for this group of independent workers in the sector.
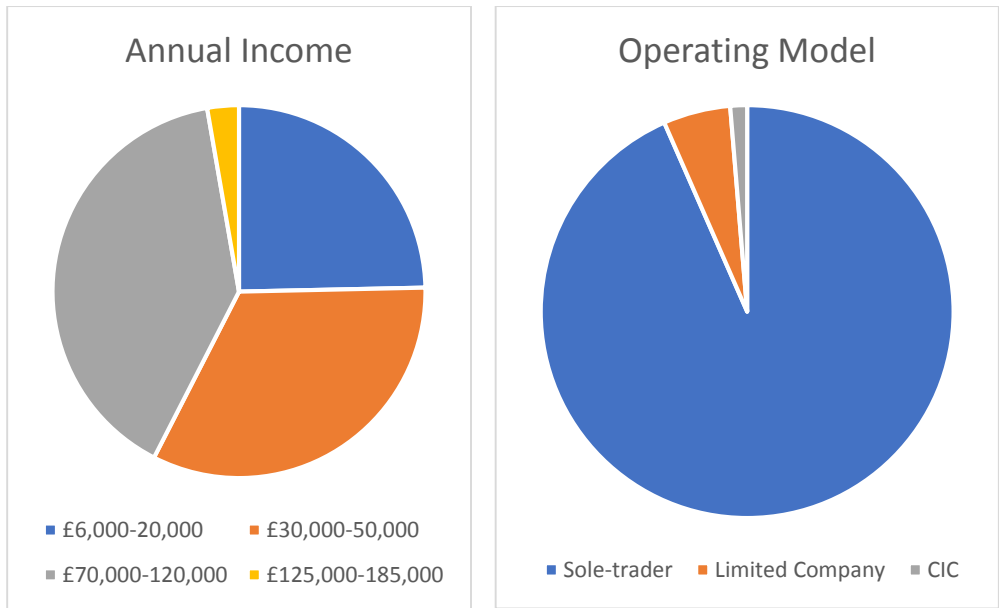
Of the group, 12 (71%) operate as sole-traders, 4 (24%) as a limited company and 1 (6%) as a Community Interest Company (CIC), with only 5 (29%) registered for VAT.

The consideration and identification of daily rates is a difficult one for all concerned, not least of all because there is a lack of transparency around this subject. There was a clear distinction between standard fees and charitable rates, with many saying that a lower fee will be influenced by whether or not the project or the individual is of interest to them. While some will charge a higher rate for London and others for wealthier organisations, many based their rates on what the organisation could afford. A few, especially those over 60 felt a strong obligation to support a sector in which there is little money by charging lower rates, while acknowledging that they brought huge value for which they were not really being recompensed. As one individual in the study put it

'our 15 minutes of opinion is worth a huge amount'.
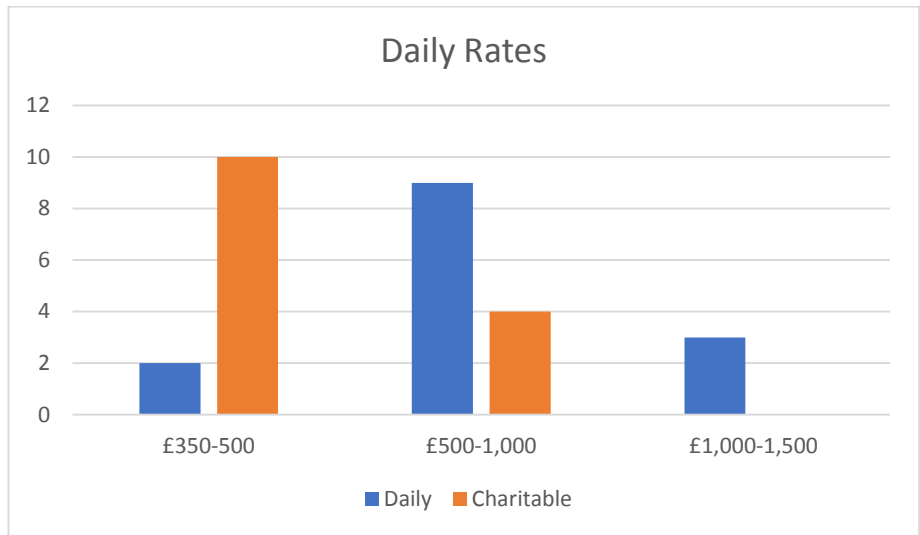
The chart above, and the table below show the standard and charity day rates for the 14 (82%) women who supplied this information.

Rate Range	Standard Daily Rate	Charity Day Rate
£350-500	2	10
£500-1,000	9	4
£1,000-1,500	3	

Most admitted to adjusting their daily rates downwards in response to bigger projects involving larger blocks of time, which might see their daily rate end up as closer to their charitable rates.

Many of those interviewed had created regular funding streams that provided them with a level of reassurance with regard to income. Operating as additions to their day-to-day work, these activities provide a specific strand of employment within their portfolio. For example, a number are associated with consultancies, some of which have a pipeline of work that the individual can access when they have capacity or require additional work, others are acting as coaches, and some have other positions, such as within universities.

There are clearly issues of what the sector can afford to pay, but additionally around the payment of a fair price for experience. If this group of former senior leaders with their years of institutional working are offering low price ranges or daily rates, then they are potentially disabling others from making the income that their services deserve and that the individuals require, most of whom as we know are main or sole breadwinners.

Looking back

When asked if they would ever return to their previous way of working 2 (12%) said that they might consider going back on a part-time basis but there was a resounding no from 11 (65%), with one stating

> 'I don't have the stamina to fix another organisation'

In the cultural sector, my own experience would suggest that identity is very wrapped up with work so that one's personal life is involved in the very thing that you do for a living, which probably explains the view from 11 (65%) of the group saying that they will never, or don't know when they might stop working. Having the energy and interesting clients were cited as reasons to continue, with one interviewee feeling that they are doing some of their best work now, feeling genuinely useful while learning all the time.

In reflecting on the positive elements of working in this way, freedom, autonomy and self-reliance were rated highly. The ability to choose one's own work, to be flexible and to continue learning and be creative were all contributors to making independent working enjoyable and rewarding. In addition, the sense of being useful and having impact was of value. No longer having the stress levels associated with running, or simply being part of, a large organisation, or having to deal with the people and the politics were also cited as major positives.

On the less positive side, overwork and doing more work than the fee covers were clearly an issue, coupled with the level of uncertainty that is often present in relation to money and work. Associated moments of doubt and drops in self-confidence, were not helped by the absence of team and the companionship and creative stimulation of colleagues.

'Falling off the radar' was a concern, as was the constant need to work on building new relationships and nurturing old ones, as well as failing to persuade clients to follow your guidance – something that could be doubly frustrating having been a Director whose instructions were usually acted upon.

If they were given the opportunity to re-start their independent careers, those interviewed suggested that they would be more organised in sorting out, understanding and implementing pensions, websites, business plans, social media presence, brand and positioning, sales and marketing, and networks. However, knowing these individuals as a consequence of the research, there is little to suggest that they would indeed do things differently second time around, especially in the light of not having seemed to suffer as a result of their current modus operandi.

Many reflected that if they were starting again, it would see them be more rigorous in managing their workload, more selective, and less inclined to take whatever came their way, so that a better work-life balance was in place, particularly in those early stages of independent working.

A small number reflected that they wished they had left their organisations sooner.

Recommendations for those considering an independent career included:

- join Boards prior to leaving your institution
- examine the projects that cultural consultancies work on as it will be an indication of what you are likely to end up doing
- talk to people who have already made the leap, seek out their advice
- consider whether you would prefer to work solo or in partnership with others
- work with people that you know and like
- put time into LinkedIn and social media, making it work hard for you
- ensure that you have put the required IT and admin systems into place to support your new way of working
- be strategic in what you commit to workwise, understanding how it will nourish you beyond the financial
- the power of 'no' will help avoid over-work and burn-out
- ensure that you set the right daily rate
- be clear on your offer(s) and how it might differ from others
- network, network, network

One individual had developed a guiding mechanism whereby her year was divided into 3 equal parts: 1 for doing the work; 1 for preparing the ground to get the work – lunches, networking, sectoral learning; and 1 for doing what she wanted to do. This recognises the value of investment in the cultivation of new work and opportunities.

Another interviewee suggested that at least half your time should be devoted to networking activity saying,

> 'You've got to be a bit of a hustler. Don't expect things to land in your lap. Roll up your sleeves and get on with it and keep on persevering.'

This more pro-active approach suggested might be considered slightly at odds with the perception reflected earlier in this report that this study group do very little to drive work, yet it serves to confirm the already recognised importance of networks, both established and new, as probably the main driver of work. This would potentially explain the focus of energy here rather than in other areas such as marketing, websites, etc.

The importance of building networks and maintaining current ones was recognised, not only for driving business, but also for helping to avoid isolation and providing support, especially when things go wrong. As Mike Mister and Rebecca Hill write, consideration of who you might need to surround yourself with in order to help you in your transition is important.[14] Zella King and Amanda Scott explore this notion further in their book *Who is in your Personal Boardroom?: How to choose people, assign roles and have conversations with purpose* (see Appendix 2).

There was much encouragement from the majority of those interviewed to increase rates. One individual shared some advice that she in turn had been given on leaving her organisation –

> 'You won't be able to charge for more than 3 days a week as the rest of your time is spent administering the work or your life.'

That advice was further supported in suggesting that individuals work on their confidence, consider getting a coach, and to think like a business – even if they aren't one. That said, this study group of older female workers, previously in leadership positions, were keen to advise those considering making the step to be cautious as it is not for everyone -

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[14] Mike Mister and Rebecca Hill, *From Work Life to New Life: Rewriting the Rules of Retirement for Smart Professionals* (2022), p92

> 'you have to want to do it and be excited to do it as there's lots of scary stuff along the way'.

The issue of when to leave full-time employment was one that individuals in the group reflected on. Taking time out before you decide what to do, getting 'your ducks in a row' and leaving 'when you're on top' were all recommended. Additionally, being clear about what you do well, what you enjoy doing, what you are offering, as well as what your usp might be (as tested on your network), were all said to be worth examining prior to departure. Final words of advice were to tell people what you are doing and what you want to do, even if it is unclear and only beginning to form.

Given the richness of experience encountered through this report, a training programme that considered the transition from organisation to independent working, potentially directed at senior leaders in the cultural sector and supporting people to move on, might be an interesting area to explore for an organisation such as the Clore Leadership Programme.

Poacher turned gamekeeper

Overall, there was a sense that the freelance and independent resource is not well managed by the cultural sector. As a consequence, it is not as strong as it might be, in comparison to other areas such as TV for example, and often not as collaborative or supportive given the competition for work, which is often badly paid. It is also very female, mirroring the sector.

Given that many of those in the study group had themselves employed freelancers in their previous roles, it was interesting to note that there was much advice that, as independent workers, they would now want to offer employers. This primarily involved:

- getting the brief right
- not asking for too much in the brief
- being clear, realistic and honest about what was wanted and/or required
- accommodate early dialogue in the process of appointment, with a willingness to be flexible and to adjust the brief if necessary
- a greater degree of respect for the time given and the work done, especially in relation to schedule and pay, bearing in mind that independents do not benefit from sick and holiday pay or pension contributions
- pay on time, given that independent workers often base cash flow on the timely payment of invoices
- keep your freelancers close to your organisation after the project has been completed

Finally, it was suggested that independents could be made better use of if organisations did not wait to appoint them until disaster was about to strike, or when underspends presented themselves.

While it would be wonderful to imagine a world where an active network of freelance and independent workers from across the sector came together to deliver shared learning and support, guidelines on rates of pay, a central resource providing financial and pension advice, access to insurance, critical illness cover, guidelines for employers of freelancers, etc, recent attempts to do similar, such as Museum Freelancers Group or the ACE funded Freelance:Futures 2022 programme, suggest that neither the professional bodies in the sector, the funders, nor the individuals themselves are ready to work in such a coalesced and collaborative way. If such co-ordination could be achieved, it is feasible to imagine sustained attempts to access international opportunities, as the women in this study would hope for, potentially through professional sector bodies and organisations such as the British Council, DCMS, Department of Trade & Industry, etc.

CONCLUSION

This research indicates that the nature of independent working, while potentially attractive to some after many years of institutional life and teamwork, is primarily a solo activity. The idea of sharing information across this specific gig-economy sector of older women workers was therefore of interest not only to those involved and working in this way, in wanting to understand how others make it work, but also to those who are considering making the leap. As a result, all interviewees were open in contributing their views and experiences.

In entering this study, I had hoped to discover new models of operating, with diverse streams of activity and income generation; however, it appears that in the main, this group are following a well-worn path that relies on a fairly narrow range of opportunities that directly reflect their past careers, combining to create an independent working life including:

Museum and gallery advisors	Funding body advisors
Consultancy associateships	Coaching and mentoring
Board, committee, etc membership	Curatorial/Artistic

That working life is of varying degrees of profitability, often dependent upon the individual's appetite or need. Those who are younger, main breadwinners, continue to create new opportunities for their businesses, using the skills that they have honed over the years yet largely directly in service of their networks. There seems to be limited entry into new markets or development of new streams of work that might diversify income streams, and despite the bravery involved in stepping out of an institution after so many years of employment, there appears to be a lack of risk taking in establishing new business.

Since this study was begun, the topic of a diminishing workforce and an ageing population has become of greater interest with public scrutiny in the media and in political circles. While the model that the women in this study adopt in this transition to a new way of working might be iterative, organic and responsive, rather than thrusting, ambitious and innovative, it may also be a reflection of their intentions and preferences after 20-45 years of intensive institutional working.

This may also, in part, come down to the way in which networks have so far proved to be the main conduit for work, and enough work to keep this group of individuals in employment. With however the rising number of independent workers and consultancies in this sector, it will be interesting to see if in future, greater competition drives invention.

The interviews with this study group of 17 women, who had previously held leadership positions within their institutions over a considerable number of years, would suggest that after such a deep and extended period of engagement with the sector that stepping out to set up independently relies largely on the previous establishment of good relationships and active networks, as well as a good instinct that has been honed over time. For most it was a natural step, taken with little difficulty - the right time had come, either through age, the completion of major projects and long leaderships, or through a desire to break free of the bureaucracy and poor leadership that they had experienced.

To a large extent most did not analyse their intention or the process, maybe not appreciating the bravery involved in taking the necessary steps, but their actions are also a credit to their appetite for risk, and confidence in their own abilities, experience and value. Clearly much emphasis is placed on the significance of networks both for employment and support.

As former leaders, many have simply been getting on with the business of doing, setting up their new businesses, identifying work opportunities and such like. In taking part in this study, a number commented on the value of being forced to reflect on their experiences, something that they might have previously done more regularly, as part of a professional development or appraisal process within their organisations yet absent in their independent lives. Reflective work is of value and 'psychology shows it's hard to self-reflect in your own head in isolation.'[15] The development of the study questions, into a form of self-reflective tool-kit, could prove useful for independent workers who no longer benefit from annual appraisals and professional development opportunities in the workplace.

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[15] How to stem the tide of senior females retiring early, *People Management*, 8 July 2022
https://www.peoplemanagement.co.uk/article/1792573/stem-tide-senior-females-retiring-early

On reflecting on their own secrets of success, the study group variously referred to their experience across the art forms, their profile and reputation, alongside a level of integrity, reliability and trustworthiness accompanied by a strategic eye. Once again, an emphasis on networks shone through, underlined by a collaborative nature and a genuine liking of, and interest in people, aided by well-developed emotional intelligence, empathy and good communication, and listening, skills. The sense of public service and desire to give back was for many complemented by a degree of self-belief, sense of humour, openness and honesty.

In a typically self-effacing way, some put their success down to their longevity, energy and hard work. Alongside this there was considerable comment around luck and being fortuitous, which may incorrectly serve to de-value the many hours and industry that they devoted to their institutions and the networks they had developed. This reticence to take credit is also alluded to in many of their references to institutional achievements as being those of their teams. In fact, in the process of the interviews many had commented that now being independent of their institutional lives, they felt more able to own and communicate their personal successes.

In a series of interviews by the *Sydney Morning Herald* journalist Nick O'Malley, the former Australian Prime Minister Malcolm Turnbull described his immediate predecessors as 'miserable, miserable ghosts'[16] as they kept re-appearing in politics in lesser roles with little or no impact. In contrast, Julia Gillard, another former Australian Prime Minister, and the women in this report are far from ghost-like and continue to influence, support and make an impact on the sector that they serve and do business in. It would be interesting to explore further what role gender plays in the impact of changing status, especially given that nearly all the women interviewed for this report were not really troubled by the change.

Given that networks are foremost in sustaining them and supporting their success, it is no surprise maybe to hear that many interviewees referenced key figures in their own lives who had influenced, encouraged and inspired them in their early years. It is a testament to their collaborative natures that, in taking part in this report, they too are offering advice and a window into their own successes in order to support those in the future.

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[16] *Sowing Seeds Life After Leadership*, Academi Wales, Welsh Government, p7

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ACKNOWLEDGEMENTS

Appendix 1

<u>QUESTIONS</u>

Career – from institutional to independent

Key details – current age, age on leaving institutional position, work/office base location (home or office)

Briefly outline your career up until becoming freelance?

How would you describe what you do now?

How did you come to where you are now? What were the steps leading towards your decision?
- How long have you been independent?
- Self-directed departure or prompted? Were there any health issues or other responsibilities that encouraged your departure?
- Did you/have you a specialism or a niche? Is that important – to have one? If you have one, how did you develop it?

Did you leave your organisation with freelance work already in place?

What value did your organisational experience have in helping you establish your independent career?

How does having had a senior role within an organisation help you in your work today?

What was the hardest part of the transition? How long did it take to establish your new career?

Did you experience a shift in status and/or authority? If so, how did you manage it?

Was there an element of reinventing yourself when you left full-time employment? If so, how hard was the challenge/did you go about it?

What tools or frameworks, if any, did you put into place to support you in that transition?

Are you a Clore Fellow or Short Course graduate? If so, did the experience impact on your decision to become freelance?

What role do networks play in your activities? How do you use them?

Are you involved with any consultancies? How does that work for you?

Business development

Are you consciously strategic about the way in which you build your business?
- If so, how? If not, why?
- What are benefits / disadvantages?
- Do you have a personal business plan or forward plan of any kind?

Where does pro-bono work fit into your way of working/living? What do you do and why?

What value does pro bono work have for your work?

What percentage of your working month does pro bono work take up?

Do you consider brand, do you think it has a value in supporting your business? If so, what do you do about it? If not, why not?

Do you invest in business development, personal development or training at all?

How do you stay up to date, keep in touch with new methods and sector concerns?

What does the future of your business look like and how is it likely to evolve?

Running the business

How do you manage your workload? How do you manage your time when you are the product?

How far ahead are you committed to work / have income planned?

How do you drive business?

What marketing or promotional tools, if any, do you use?

Do you employ others? If not, would you and under what circumstances? If not, why not?

Does your location influence what work you take?

What is the geographical range of your work?

Has the pandemic impacted on your work? If so, how?

Money -
- When you left fte, did you know how much money you 'needed' to earn
- Did you take any financial advice at the time of leaving or since
- Did you leave on a final salary pension? Do you continue to pay into a pension?
- Daily rates – how determined, how they changed? How do you value your worth?
- Personal circumstances
- Roughly how much money have you made in each of the last 3 financial years?
- Sole trader, limited company, VAT registered or not?
- Do you worry about money?
- Do you need to work?

Reflections

Would you change anything?

What are the pros of working in this way?
- What do you like the best? What has worked best for you?

What are the cons?
- What's the worst? What has worked less well?

What was the best advice you were given at the early stages of setting up, and who from?

At what stage/point did you acknowledge that it was now your way of working/being?

Do you feel committed to this way of working, or would you ever consider going back into full-time or part-time organisational employment? Why? Any regrets?

When will you stop working?

What do you think drives you?

How would you describe the culture across the freelancer world in the arts? Do you think it could be improved upon? If so, how?

If you were doing it again, what would you do differently?

What advice would you give to others considering the step?

What advice would you give to employers of freelance workers?

To sum up – what would you say are the secrets of **your** success?

Who is in your Personal Boardroom?: How to choose people, assign roles and have conversations with purpose by Zella King and Amanda Scott, CreateSpace Independent Publishing Platform, 2014

The 12 roles in your Personal Boardroom

Information roles
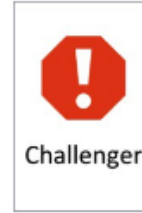provide new knowledge, insights and ideas

Customer voice	Expert
Inspirer	Navigator
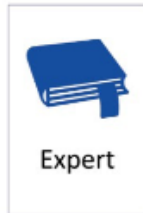
Power roles
provide access to people and resource and get things done

Unlocker	Sponsor
Influencer	Connector

Development roles
provide feedback, challenge, courage and balance

Improver	Challenger
Nerve-Giver	Anchor

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