

LEARNING CIRCLES: An Effective Model for Professional Development and Organizational Capacity Building

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THE LEARNING CIRCLE IN ACTION

Six non-profit executive directors (ED) are gathered around the conference table for their monthly Learning Circle session. They are laughing, talking, and sharing the past month's trials and tribulations over coffee and donuts. Each person has taken a few minutes to jot her/his name on the white board thus securing a twenty-five minute slot in the three-hour meeting agenda. The facilitator calls the Circle to order and the session begins with a brief check-in, ice breaker, and review of ground rules.

The facilitator reminds Circle members that they should begin by sharing their progress on the change-oriented action they committed to undertake the prior month, and then quickly and concisely present today's professional challenge. They are asked to be specific about the kind of feedback they would like from their peers. All members are encouraged to participate actively, maintain confidentiality, and be respectful of each other and the Circle structure.

Going around the table, each ED briefly reminds other members of the action he/she committed to take in the intervening month between meetings. Lucia reports that she has conducted five of ten planned interviews aimed at building better strategic alliances with other social service agencies in her area.¹ At the prior Circle session, her peers suggested that she conduct a series of one-on-one interviews carefully designed to focus on the self-interest of the *other* agency rather than on the needs of her own. "Listen and evaluate

and then go back later with proposals on how to best leverage resources," suggested the peer group. At this month's meeting, Lucia would like help analyzing the information she has gathered in her interviews to date.

It is Victor's turn to take the floor and he is agitated. The director of an arts organization with fifteen employees, he is frustrated by the fact that his development director has gone directly to a board member with a complaint. Incensed by what he considers to be insubordination, he seeks guidance from the Circle. The ensuing conversation helps Victor to separate two different issues at play. The group probes his interactions with the development director and reflects that there may have been miscommunication in setting fundraising expectations. Secondly, more discussion reveals a pattern of board members meddling in personnel matters. The peer group spends time discussing supervision and goal setting techniques as well as appropriate roles and responsibilities of board members and mechanisms for beginning to educate the board.

When it's Janet's turn, she shares openly with the group a frustration with her own style: *"Sometimes I get crabby about work, and I know my staff senses this. I need to build a team, healthy work habits, and a more balanced work environment."* Circle members probe Janet's work style and she admits, reluctantly, that she tends to be autocratic and has trouble delegating. She works long hours but also tends to leave things until the last minute creating a crisis for everyone when deadlines creep up. The group discusses steps that she can take first, to get her own house in order. They suggest that she develop a work plan for

¹ Names and organizations have been changed to protect confidentiality.

herself that prioritizes key activities and try sticking to the plan and its timeline over the next month. The group agrees discussion on building a staff team can wait until the next session.

The scene above describes a typical Learning Circle session sponsored by Girl's Best Friend Foundation (GBF), located in Chicago. GBF is a private, family, grant making foundation. When Cyndie McLachlan founded GBF in 1994, it was with the plan to be a short-term foundation, not a perpetual one. The foundation has chosen to use its relatively modest resources for the greatest impact. It is spending down its assets over the next three years.

GBF's mission is to promote and protect the human rights of girls and young women by advancing and sustaining policies and programs that ensure their self-determination, power, and well-being. Many of its grantees are small non-profit organizations with limited organizational resources and capacity. Particularly because the Foundation is closing, it has made a special effort to support capacity building for long-term sustainability. In an effort to strengthen these organizations in a cost effective manner, the Foundation made a four-year commitment to invest in the professional development of executive directors, program managers, and other staff using a unique strategy – the Learning Circle.

The Foundation retained Millennia Consulting, LLC to convene and facilitate twelve circles over four years.² Millennia was selected because of its deep knowledge of the non-profit

community, commitment to social change, and because facilitators were able to bring a wide range of organizational, leadership development, and facilitation skills to the Circle process. Millennia facilitators have worked in management, administrative, policy and program positions bringing real life understanding of the demands that non-profit staff faces daily but as experienced consultants to the sector; they have also been able to offer insights on trends and best practices as well as a neutral consultant's eye.

Millennia facilitators have actively modeled facilitation methods in guiding the Circles. In fact, because so many of the GBF grantees are engaged in group work with girls, there has been great interest in learning more group facilitation skills than could be effectively addressed in a Circle session. This demand was met in year two by a special two-day facilitation skills training. Circle members had the option to attend but it was not mandatory.

The Circle approach has proven to be enormously popular among GBF grantees and an effective way for the Foundation to support professional development and organizational capacity building.

WHAT ARE LEARNING CIRCLES AND WHY ARE THEY IMPORTANT?

A Learning Circle is a focused discussion group that harnesses the wisdom and experience of professional peers. Circles are professionally facilitated and meet for seven consecutive months providing a structure and framework for high quality peer learning and mentoring. Circle members share professional

² Millennia Consulting, LLC.
www.ConsultMillennia.com.

challenges and receive feedback and ideas from others in similar professional positions.

Learning Circles are not free form discussion groups or sensitivity sessions. They are geared toward defining real-world challenges and finding incremental action steps that address issues raised by Circle members. They are highly structured discussion groups with ground rules and a clear agenda. Each Circle member gets time in *each* Circle session to present a professional challenge and to ask for specific types of feedback. Circle members close each meeting by agreeing to take specific action between sessions. Each session is evaluated. This format ensures that the immediate self-interest of each member is met.

In the GBF model, facilitators work closely with a Foundation program officer to invite grantees with similar levels of professional experience and coming from organizations of comparable size and complexity. An effort is always made to configure groups that are diverse racially/ethnically. Participation, while encouraged, is entirely voluntary.

Similar peer driven learning groups are used around the world and have been developed with adult learning theory as a foundation. Research shows that adults learn best when they are building incrementally on what they already know in an environment that allows for problem definition and action. This process leads to practical knowledge acquisition and skill building. Or put another way, adults should be able to apply what they learn to real life challenges; receive feedback from peers about what they are learning and trying

out; and be able to observe new processes and approaches modeled by others.³

Adult learning theory provides the basis for the literature on “learning organizations” which has gained currency in recent organizational development and management circles.⁴ Learning organizations foster a commitment to lifelong learning and the establishment of internal organizational mechanisms such as regular work group reflections on issues or topics of concern. Mechanisms used in the Learning Circle teach and model behaviors, facilitation skills and tools that Circle members can adapt to a range of team building and learning activities in their own organizations.

LESSONS LEARNED FROM GBF CIRCLES

Non Profit Staff Need More Professional Development Customized to Individual Needs

Millennia provides services to hundreds of nonprofits and we have observed over time that few non-profits, especially those in the small to mid-sized range of \$100,000- \$3 million, make a significant or sustained commitment to training and developing staff. In our experience, these organizations have relatively flat organizational hierarchies and career ladders are virtually non-existent. Moving up usually requires moving out

³ McNamara, Carter. Authenticity Member’s Guide and Journal. Authenticity Consulting, L.L.C., Minneapolis, Minnesota, 2002.

⁴ Senge, Peter M. The Fifth Discipline: The Art and Practice of the Learning Organization. New York, New York: Currency Doubleday. 1990.

of an organization to a position elsewhere.

Those nonprofits at the smaller end of the spectrum rarely have human resource managers other than the executive director and funding is largely restricted to specific programs, leaving little left for extras like teaching staff the organizational, administrative, and management skills they need to realize and sustain mission and build organizations, do their jobs well, and advance in their chosen field. Resources to invest in staff development are scarce and allocation to this activity is often not a priority. Budget allocations for professional development are significant if they reach the \$10,000 mark. In-house training departments are rare in organizations under \$3 million and the training that is imparted tends to be very specific.

Our observations have been confirmed by those who have participated in the Circles. Learning Circle participants report relatively few meaningful professional development opportunities.

For example, members report that they are trained on basic office policy and procedure, receive mandated instruction on regulatory matters governing their industry and may receive organizing training if the employing organization is community based or advocacy oriented.

When skill development training is offered it is often in the form of external, day-long courses on specific topics like supervision, project management, and budgeting. While such courses can be very good, content and quality can be inconsistent and may or may not end up meeting trainee needs.

More recently, universities have generated a plethora of executive management courses, usually a couple of weeks in duration that have sought to advance the skills of executive directors and higher level managers in nonprofit organizations. While executive participants report that they enjoy these courses, they say that the most important aspect of the experience is meeting and learning from peers with similar problems to solve.⁵

Unlike externally driven training modalities, Learning Circles capitalize on the strength of the peer interaction and on the motivating principle of self-interest. Circle structure strictly protects the individual member's right to decide what challenge or issue he/she will bring to the meeting. The member describes the challenge and formulates critical focus questions designed to guide the peer discussion and feedback process. Peers in turn, are given coaching about how to ask open-ended probing questions that cause the whole group to delve deeper in thinking about the concern at hand. They share information about similar experiences but are directed to limit advice giving.

In evaluations regularly collected from GBF Circle members, they report that the process of having to select and prepare a topical conversation about a challenge that is current and sometimes painful is extremely useful as a tool for reflection and critical thinking. They also report that listening to other members' challenges and the solutions posed are equally useful because in so many cases, all members of the group

⁵ Pagnoni, Laurence A. "A Group of Coaches." Published by Laurence A. Pagnoni & Associates. 2004.

struggle with similar issues in their organizations. Typical issues that members face include needing to better engage boards in governance, policy making and fundraising rather than day-to-day operations. Building cohesive staff teams, motivating employees, fostering workplace accountability, balancing work and personal lives are also very commonly discussed challenges.

"I learned how to diffuse conflict at work, how to improve our training model, how to improve our curriculum documentation, and how to advocate for the girls we serve."

"My actions linked together to become a huge, much needed, growth process for me in my position"

Finally, Learning Circles are not a one-shot deal—one day of training isolated from day-to-day realities. The GBF Learning Circle model has included an orientation session and then a six-month sequence of 3-hour meetings. This more lengthy time period allows for relationship building and extended reflection and action. In fact, many of the more senior managers who have participated recommend that the cycle be extended even longer to nine months or a year. A number of the GBF Circles have continued to meet informally maintaining their collegial and professional alliances.

Investment in Professional Development Builds the Bench-Strength of the Non-Profit Sector

While the Circle focuses on individuals, our experience shows that by building the individual's professional skills and by expanding that person's perspective on his/her job, we are building the

bench strength of nonprofits more generally. Because career paths in the non-profit sector tend to require individuals to move from one organization to another to move up, an investment in a non-profit professional at any level is an investment in the sector.

Three years ago, GBF formally added field strengthening to its goals. In this context, investing in professional development for executive and program staff who predictably cycle out of grantee organizations is strategic.

We have qualitative evidence that the Circle models group process techniques and discussion methods that are transferable to other settings. Members bring these skills back to their organizations and use them to lead their board and their staff. Members break old habits that may actually have been destructive or unproductive and gain new habits that are better informed and which build organizations.

Enhancing Reflection and Critical Thinking

Nonprofit professionals at all levels are stretched thin. Many organizations operate on bare-bones budgets and little infrastructure support. Staff simply does everything. "That is not in my job description," is not a phrase heard often from nonprofit staff. As a result, many are working long hours for low pay. They have little time to step back and reflect on their work or their organizations. The Learning Circle offers this rare opportunity.

For example, in a recent group, a Circle member reported that she had been interviewed to sit on the board of a local

foundation. She admitted that she hadn't taken the opportunity very seriously, thinking that it would divert her from her work building her unique program with girls. She asked her peers to help her think through the pros and cons of her participation. Circle members were unanimously in favor of her pursuing the opportunity. They pointed out that relationship building was essential to promoting and building programs, and of course, understanding how grant making was done would enhance her ability to seek out funds successfully. Had she not brought this discussion to the Circle, this member would have simply dismissed a critical leadership opportunity, never reflecting on its value to her program and to her personal development.

Learning Circles Help Reduce Loneliness at the Top

For executive directors, where life can be lonely at the top, the Circle provides a confidential sounding board for ideas, and anxieties. Challenges brought by this group to Circle sessions tend to focus on creating and sustaining strong administrative and management structures to support their organization's mission. Often discussions center on planning, board development, fundraising, managing growth, staff development and team building.

It is very helpful for these directors to share strategies for recruiting and cultivating more effective boards. The Circle has enabled executive director members to gain personal support and an outlet for frustration.

Fundraising is without question another ongoing worry for executive directors.

Many are concerned with how to better develop new sources of foundation support as well as learn individual donor cultivation strategies.

Developing strategic plans, making strategic decisions about program development and tying together program planning and budgeting are also commonly raised.

Executive directors have also used the Learning Circle forum to gain insight and experience from peers into how to effectively hire and work with external consultants. They have shared information about how to build and motivate staff and board teams and have discussed growth and expansion strategies. Perhaps most importantly, they have developed peer networks – a key secondary value of the Circle model.

Peers Offer Perspective on Executive Transitions

According to a recent CompassPoint study, three out of four executives plan to leave their jobs, within five years and annually nine percent actually leave. Only 29% however, have discussed a succession plan with their boards⁶ Considering that executive transitions, especially those involving a founder, can be very difficult for nonprofit organizations these reports should raise a red flag for the nonprofit community indicating a need for executive support and mentoring.⁷

⁶ Jeanne Bell Peter, Moyers, R. and Wolfred, T. "Daring to Lead 2006: A National Study of Nonprofit Executive Leadership." A Joint project of CompassPoint Nonprofit Services and the Meyer Foundation. 2006, pg 5.

⁷ "Capturing the Power of Leadership Change: Using Transition Management to Strengthen Organizational Capacity." The Annie E. Casey Foundation. Baltimore, Maryland. 2004.

In fact, GBF circles have attracted several *founding* directors with exactly these concerns about transition. In the life cycle of nonprofits, founders are often highly entrepreneurial and charismatic, attracting money and supporters; however, they often hold all information in their heads. Newer staff complains that founders dominate; there are no administrative systems in place; that personnel practices aren't fair, and accounting is rudimentary.⁸

Founding directors in our circles have brought their struggles to the table. They have discussed how challenged they are by the need to transfer critical knowledge, by including and developing new leadership and simply by letting go. The founders used the Circle to think about succession and personal goals for the future.

Mentoring Program Staff

We have talked a lot about how executive directors have used the Circle process but we have also had success in Circles comprised of program managers and developers, often individuals in their mid twenties and thirties. In these groups, the facilitator often plays a more consultative role introducing new information about nonprofit management practices, mentoring members, and framing issues more organizationally.

Nationally, peer groups like Learning Circles operate using several related models. Some models are based on a philosophy of absolute facilitator neutrality. Generally speaking, we have found this works well when Circle

members are more experienced and peers are well-equipped to offer insights and if they have a broad knowledge of the sector. Younger, less experienced nonprofit professionals yearn for guidance and new ways of reflecting on their work. Our members have given high marks in evaluations when the facilitator offers this guidance.

Unlike their executive director counterparts, program managers quite naturally tend to bring program development challenges to the table—measuring outcomes, conducting needs assessments, volunteer recruitment.

Many also want to talk about personal strategies for advancement and skills needed to move from one professional level to the next. Networking, understanding career paths, negotiating and advocating for themselves are primary concerns. Learning Circles are a promising approach to increase the number of prospective new executive leaders.

One member asked the Circle to help her find mentors. She was especially interested in meeting older more experienced women that she could talk to periodically. Other members of the group were very intrigued by this notion and together, they strategized about ways to identify and meet mentors.

Surfacing Ideas for the Foundation

GBF has found that the Learning Circle model has helped it stay attuned to grantees. While all Circle discussions are confidential, the facilitator submits a report at the end of each seven month sequence. The report highlights issues raised and facilitator insights.. In this

⁸ Linnell, Deborah. "Founders and Other Gods." *The Nonprofit Quarterly*. Spring 2004, pgs 8-17.

way, the Foundation has been able to track themes among grantees and has responded with other technical assistance and training initiatives.

CONCLUSIONS

Nonprofit organizations, whether they are very small or quite large, are extremely complex to manage and work for. Often these organizations give professionals, at all levels, autonomy and decision making authority not always commensurate with their training or experience. Individuals may not get the mentoring, training, and time for disciplined reflection that make them decisive, disciplined, and good leaders. Employees other than the directors and managers also benefit from reflective and analytic time that enables them to think about their jobs more holistically. We believe that the Learning Circle offers a unique forum for addressing a wide array of management, administrative, and organizational issues in a flexible and constructive way.

To Be Successful, Learning Circles Need Financial and Leadership Support from Funders

Unfortunately, the value of professional development is not well-understood or valued by many funders, especially of small organizations. When offered, the overwhelming numbers of these groups eagerly seize funding and proffered opportunities.

We believe that two things really enhance participation and commitment to the GBF Circle initiative. First, GBF subsidizes the cost of Circle participation (about \$1000 per participant), removing financial barriers.

Secondly, the Foundation provides leadership in putting professional development front and center. Invitations to join Circles come from the Foundation.

Although purely voluntary, organizations are encouraged to send their staff. Each Circle sequence begins with an orientation session convened by Millennia but GBF staff is there to welcome new members and to stress the importance and rarity of this opportunity. Millennia reinforces this message by requiring Circle members to sign a letter of commitment and to receive sign-off from their supervisor. We also stress the importance of regular attendance at all six sessions. Attendance is perhaps the most critical issue in the success of the Circle process. If members fail to attend regularly, trust and continuity among peers is undermined. Commitment from the organization is needed to support staff in fulfilling their attendance commitment.

Encouragement from the funder helps ensure that commitment. In fact, if we have one overall recommendation from our experience with Learning Circles, it is that funders must begin to invest in meaningful, long-term professional development opportunities as a means of increasing effectiveness within organizations but more importantly, as a way to build the strength of the non-profit sector.