

# The Chronicle of Philanthropy Special Report

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### Coming Together



Sonia Manjon and Karen Ransom, who run arts groups in the San Francisco Bay Area, participate in a monthly gathering where leaders nonprofit groups candidly discuss problems and share ideas that work.

***Nonprofit executives are forming support groups to improve their career skills and battle isolation on the job***

By Sue Hoye

A year ago, Ruth Ann Binder was struggling with her board of directors, worried about budget shortfalls, uncertain about her organization's future, and, for the first time in her life, suffering from insomnia.

Now, she says, her organization, Rebuilding Together San Francisco, which renovates homes for low-income families, is strong, stable, and financially secure. And she is sleeping a lot better.

Ms. Binder says that the turnaround came about largely because of the help she got from other nonprofit leaders — people she met in a support group formed by LeaderSpring, an Oakland, Calif., organization that trains charity executives.

In a growing number of cities across the country, nonprofit leaders are starting such groups to help fight the sense of isolation that many chief executives feel.

The goal is not just to find emotional support, but also to make it easy for nonprofit leaders to teach one another the professional skills they need to succeed in their jobs. The groups have become so popular in some cities that charity leaders must compete in a rigorous application process, and many applicants are turned away because demand outstrips available groups.

Many nonprofit leaders could use some extra help. Three-quarters of nonprofit executive directors plan to leave their jobs within the next five years, mostly because of problems with their boards and fund-raising struggles, according to a study conducted by the Eugene and Agnes E. Meyer Foundation and CompassPoint Nonprofit Services, a San Francisco management-consulting group.

Ms. Binder says her peer group taught her specific skills for how to deal with her board and better manage financial issues. She recently completed a successful board retreat, for example, and is in the process of soliciting some donors who can make big gifts.

The group, she says, "helped me to step forward and say, 'Yes! I'm leading this organization.'"

### **Confidentiality Required**

The structure of executive-leadership groups varies, but they share many characteristics. Most of the efforts involve face-to-face meetings and demand that participants respect the confidentiality of their peers in talking about the group to outsiders. Most of the groups have at least seven and no more than 20 members; regular attendance is usually required.

Meetings often begin with participants giving a personal and professional update, which includes revisiting topics raised at past meetings. Many groups decide what to discuss ahead of time and are led by a consultant or other moderator, though moderators may not be used at every meeting.

CompassPoint began organizing "leadership circles" for charity executives five years ago. For nine months, seven leaders meet once a month for a series of discussions, beginning with training on how to coach fellow executive directors. After the last gathering, CompassPoint gets out of the way, but the groups usually continue meeting independently.

Most executive directors who participate say the biggest attraction of the meetings is spending time with a committed group of leaders facing the same career opportunities and challenges.

"It is very difficult when you are working in these positions," says Lindy Hoyer, executive director of the Omaha Children's Museum. "You've got a staff that reports to you, and you report to a board, and there really isn't a peer within the organization. The peer-to-peer support was what was attractive to me: 'Help me, talk to me, tell me it is going to be okay.'"

Ms. Hoyer participates in a Chicago roundtable for museum directors started by Will Phillips, president of REX (Roundtables for Executives), in San Diego, and by Durel Consulting Partners, in Baltimore.

After creating the roundtables in the early 1990s, Mr. Phillips and other consultants now hold such groups in or around Atlanta, Boston, Chicago, New Orleans, St. Louis, and Washington. The groups are led by a facilitator who does research on topics to be discussed and compiles reading lists for participants. A recent meeting, for example, focused on how to evaluate the performance of staff members.

Some of the museum roundtables have been meeting for more than a decade, says Mr. Phillips, adding that some people have never missed a meeting. Each group has 12 members who meet for two days, three times a year.

They each pay up to \$2,500 a year to cover the cost of the facilitator and the meeting space, plus any travel costs. Many members' fees are picked up by their organizations.

Other nonprofit executive groups, like Ms. Binder's in California, do not charge fees, but the competition for membership is fierce.

For the past nine years, LeaderSpring has been granting two-year fellowships in two 15-member groups for executive directors, one in San Francisco and the other in Oakland.

To participate, charity executives go through an extensive application process, including writing multiple essays on their professional qualifications and goals, getting written approval from their boards, and being interviewed in person.

LeaderSpring received more than 120 inquiries for the 15 spots available this year, according to Cynthia Chavez, the organization's executive director.

The process allows Ms. Chavez to choose people from organizations in the same geographic area who often don't know each other but are working to help the same neighborhoods.

"They come into the room at the beginning not knowing each other," she says. "In four to six months they are committed to investing in each other's success."

The LeaderSpring members meet for a full day 10 times a year for two years. They take turns hosting the meetings at their organizations, covering fund raising, personnel issues, board relations, and many other topics.

When they complete the program, they continue to be invited to annual LeaderSpring gatherings and are encouraged to continue meeting.

### **'This Isn't About Venting'**

Experts who moderate peer groups for charity executives say that participants go beyond simply airing their problems and concerns.

"This isn't about venting," says Laura Otten, executive director of the Nonprofit Center at LaSalle University, in Philadelphia, who has been helping run such groups for four years. "This is about being constructive and looking at a problem from different directions. It isn't just tea and sympathy. It is about executive directors improving themselves and being given those tools by peers."

Ms. Otten helps run executive peer groups called Clear (Cultivating Leadership, Excellence and Responsibility) Circles, which meet nine times a year for two-hour sessions. The center holds six to eight circles a year, each with seven or eight members who pay \$380 or \$450 each; center members pay a discounted rate.

While many educational centers and regional nonprofit associations like Ms. Otten's have formed groups for charity leaders, others have been created by individuals.

Soon after Rob Acton started his job two years ago as director of the Cabrini Green Legal Aid Clinic, in Chicago, he had lunch with a friend who had also recently become a new nonprofit executive director. By the end of the meal, they had decided to get together every other month and invite directors of other organizations to participate.

Mr. Acton's group now numbers 18. Although other people want to join, the group is closed to new members to help promote camaraderie and enable all the executives to engage fully in the discussions.

"It's like everyone is chomping at the bit to be a part of it, because everyone recognizes a need for it," Mr. Acton says.

The group follows a simple format, meeting for lunch and taking turns hosting the gathering at members' offices.

The meetings always have an agenda, with the first 20 to 30 minutes devoted to the leaders sharing helpful resources: a fund-raising idea that worked well, a management book they have read, or a new approach they took at their organization.

For many directors, that is the best part of the meeting, Mr. Acton says. Afterward, the group alternates between a free-flowing conversation and talks directed by a facilitator.

Mr. Acton and other executives say the groups help new leaders learn good management practices and other critical job skills far more quickly than they would otherwise.

"There is a real savings in the learning curve," says Peter V. Berns, the executive director of the Maryland Association of Nonprofit Organizations, in Baltimore, which four years ago started support groups for charity executives in response to demand from its members. Participants must commit to attending at least two-thirds of the 12 meetings held annually.

### **'Boot Camp' for Charity Leaders**

With increasing numbers of charity executives beginning to retire as baby boomers enter their 60s, other organizations are designing peer groups for the new, often less-experienced leaders who will replace them.

In Chicago, 35 nonprofit executives with less than three years of experience on the job met for a "boot camp" sponsored by the Axelson Center for Nonprofit Management at North Park University, in Chicago. The training covered topics such as how to engage board members, juggle work and personal responsibilities, and enhance leadership skills.

The event's organizer, Bill Braden, a former executive director of the Red Cross chapter in Chicago, purposefully included plenty of peer-to-peer exercises and discussions on his agenda.

As a former charity leader, Mr. Braden says he did so because he remembers the isolation he had encountered on the job.

The gathering was so successful that a second boot camp for another 35 new directors is scheduled for 2007.

One of this year's participants has taken his battle against isolation online. Not long after taking the top job at the Guild for the Blind, in Chicago, David Tabak started an Internet discussion group. He invited other nonprofit executives, who must request permission to participate, to join him [online](#).

In less than two years, Mr. Tabak's C3EO Forum, as it is called, has grown to more than 130 participants, mostly in the Chicago area. Mr. Tabak says that the online forum is one of the fastest, most effective ways he has found to get help.

For example, when he was looking for an auditor he posted a message, asking if anyone who had gone through the auditing process had tips or auditor recommendations; within 15 minutes, he says that he had 17 responses and recommendations from people he has come to know and trust. That saved him time and kept his organization from spending too much money on the financial review.

Recognizing that not everyone is comfortable chatting about problems online, his group also has in-person monthly meetings with 15 chief executives.

Mr. Tabak admits that most of the personal support comes from those meetings, but the initial relationships and connections were made online.

Despite the success of efforts to connect nonprofit leaders with one another, it isn't always easy to persuade charity leaders that such meetings are worth their time.

"They see it as personal benefit rather than professional," Ms. Otten, the peer-group moderator, says. "The ones who do it understand that investing in themselves is investing in the success of their organization."

Ms. Binder agrees. If she hadn't participated in a peer group with other charity leaders, she says, "I may not have had the tools I needed to navigate. I may not have been able to stay with my organization."