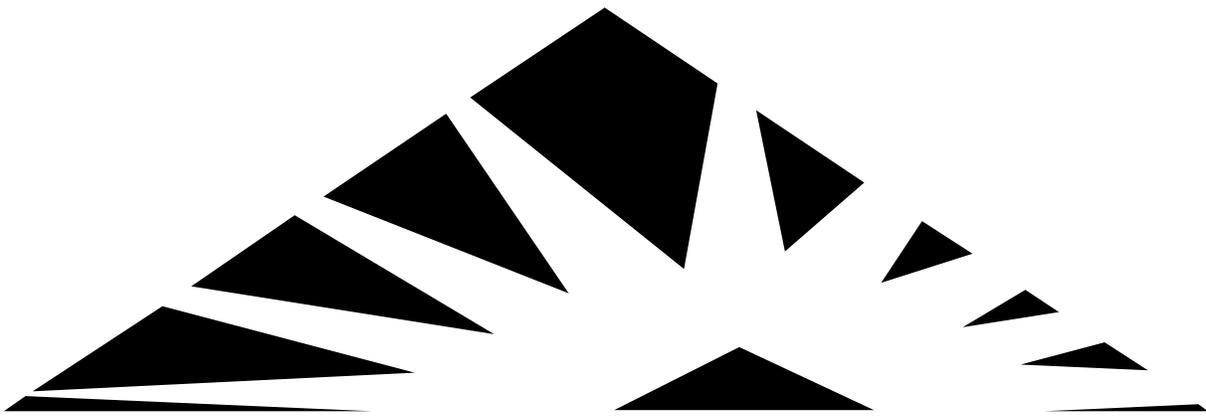


# **Strengthening the Capacity Of Executive Directors**

## **HIGHLIGHTS**



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**A Pilot Project for the  
National Learning Initiative for the Voluntary Sector**

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"The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada."

**Canada**

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# STRENGTHENING THE CAPACITY OF EXECUTIVE DIRECTORS

## *Introduction*

Executive Directors (EDs) are a significant asset in nonprofit organizations. They fulfill a critical leadership and/or management role and are responsible for organizing and directing employee and volunteer activities towards the completion of the organization's mission.

In effect, Executive Directors are the fulcrum on which balances the success or failure of an organization. Because of issues such as poor compensation and benefits, excessive demands and responsibilities, and few learning opportunities, Executive Directors are an asset that is vulnerable and at risk for leaving an organization. Finding an approach to reduce the vulnerability of Executive Directors is a timely undertaking. One obvious tactic along this path is to understand and improve the various dimensions of job quality and job satisfaction as lived by people in the role. Ensuring that Executive Directors are satisfied in their role could significantly and positively impact on the capacity of an organization to address its mission with a strong, committed, and loyal employee and volunteer base. By strengthening the Executive Director role, the overall capacity and sustainability of individual organizations and eventually the nonprofit sector, can be improved. If left unaddressed, the risk is that both leadership and management skill sets will leave the nonprofit sector for better jobs in other sectors. Should that happen, the ability of the nonprofit sector to cope with the demands placed upon it will drop dramatically.

The recent Canadian Policy Research Networks' recent paper, *Job Quality in Non-Profit Organizations*<sup>1</sup> identifies eight dimensions of job quality:

1. Extrinsic rewards
2. Hours and scheduling
3. Employment relationships
4. Organizational structure
5. Job design
6. Intrinsic rewards
7. Skill use and development
8. Health and safety

The first two dimensions – extrinsic rewards and hours and scheduling – were the focus of the paper. The other dimensions were largely unexplored. In all cases, the data was generalized from the *Workplace Employee Survey* carried out by Statistics Canada.

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<sup>1</sup> McMullen, K. & Schellenberg G. (January, 2003). *Job Quality in Non-Profit Organizations*, CPRN Research Series on Human Resources in the Non-profit Sector No.2. Canadian Policy Research Networks

In the Fall of 2003, the Coalition of National Voluntary Organizations submitted a proposal to Human Resources Development Canada for a project entitled “Ensuring Social Inclusion in Leadership Development in the Voluntary Sector”. This project was under the auspices of the National Leadership Initiative – a national initiative to improve the capacity of the nonprofit sector by supporting leadership development through education. Three educational pilots were funded with Langara College, Mount Royal College, and Niagara College, each taking the leadership role for one of the pilots.

This report summarizes the findings of the pilot project completed by Mount Royal College working with nine nonprofit organizations in Calgary.

## ***Methodology***

The project was undertaken with stated primary and secondary objectives addressing areas of interest to the National Learning Initiative. An action research orientation was used to address both objectives

**Primary Objective** – To conduct an assessment of interventions to create change in participant perceptions of job satisfaction and quality related to the role of Executive Director. To do this a Pre- and Post-Project Survey as well as activities within the peer learning circle process that took place in between the surveys was used.

Two facilitators worked with the peer learning circle on a monthly basis and individual members on an as needed basis. Expert knowledge on issues raised by the participants would be gathered by the facilitators and distributed to the peer learning circle. Discussions on the significance of the new information were planned to provide participants with an opportunity to reflect on what the information meant to them and their organization.

Individual participant feedback reporting notable changes in workplace satisfaction and job quality was collected through worksheets completed at each meeting, facilitator notes, and individual discussions with participants.

**Secondary Objective** – Information gathered at peer learning circle meetings would be collated to create a case study for each participating Executive Director. The case studies would also draw on archival information such as annual reports and web pages as well as worksheets used by participants to record their thoughts on each meeting's activities and discussion. The case studies appear under a separate cover.

The cases could provide the basis of future research into retention, compensation, workplace modifications to enhance job satisfaction and motivations of Executive Directors.

## ***Participant Profiles***

In December 2003 a total of 10 organizations were selected to become part of the Peer Learning Circle. Of that number, nine were able to participate from January through to the end of May 2004 when the project concluded. Organizations that became part of the project were contacted from a list of over 100 organizations generated with assistance from The Calgary Foundation, Volunteer Calgary, Family and Community Support Services, and reviewing the inventory of organizations making up InformCalgary – an online listing of social service agencies in Calgary.

Small organizations in terms of staff complement were requested or searched for. No other criteria were given, thus not restricting the list of potential contacts to a particular budget size, number of staff, clients served etc. When individual organizations were contacted, the project was described as an initiative focusing on small nonprofit organizations. Organizations identifying themselves as “small” in the initial contact were invited to become part of the peer learning circle. All organizations were given the option to remove themselves from the project after the first meeting if they wished.

The Peer Learning Circle was made up of the following nine organizations:

	<b>Revenues (\$)</b>	<b>Expenses (\$)</b>
1. Progressive Alternative Society of Calgary	1,140,972	1,140,972
2. Ghost River Rediscovery	1,273,060	1,014,275
3. Accessible Housing Society	1,433,055	1,432,754
4. Confederation Park Seniors	440,000	490,000
5. Calgary Bridge Foundation for Youth	357,000	345,000
6. Calgary Chinese Community Services Association	449,000	448,800
7. Calgary Multicultural Centre	285,000	238,000
8. Federation of Calgary Communities	520,000	456,000
9. Native Addiction Services Society	1,200,000	1,300,000

Of the nine Executive Directors involved in the study only one had made the choice to become an Executive Director. The other eight either fell into the role by being the only person at the organization who was familiar with its operations or were asked to take on the responsibility as a temporary move that, because it was not readdressed by the board, became a permanent position.

## **Ethics Approval**

The project was submitted to the Ethics Committee of Mount Royal College and received permission for the project to proceed on January 5, 2004. Permission agreements were signed by each participant.

## LEARNING IN THE PROJECT

Several writers from the realms of psychology, adult education, and organizational learning have echoed each other in their statements about the power, impact, and enduring nature of learning through peer learning circles. Their reflections and evidence of how adult learning occurs and is most effective in terms of translating the learning into a tangible practice in the workplace have remained true for this Peer Learning Project hosted and facilitated by Mount Royal College.

Peter Senge (Senge, 1994)<sup>2</sup> suggests that until people make their work space a learning space, learning will not be central to what they do. Carl Rogers (Rogers, 1961)<sup>3</sup> offers the suggestion that the only learning that significantly influences behavior is self-directed, self-appropriated learning. Knowles (Knowles, 1990)<sup>4</sup> an adult education expert, writes that if adults learn what is useful to them and the adults secure that learning at a time when they most need it, the learning will 'endure'. Stephen Brookfield (Brookfield, 1990)<sup>5</sup> an expert in adult education, explains that when adults encounter a 'traumatic' experience (one that truly reveals assumptions, beliefs, and values and causes the individual to re-think who they are central to what they do) the learning is most effective. Learning from these various perspectives is arduous, but effective. This research project bears this out.

### ***The Research Project: A Snapshot***

One of the 'assumptions' going into the project was that Executive Directors in the nonprofit sector are constrained by the demands on their time and on their resources, and that, for the most part, executive directors operate in relative isolation. Because of the demands on their time, EDs have limited opportunity to interact with other nonprofit organizations. Their contacts outside of the organization appear to be mostly with regulators, funders and a small group of allied agencies.

*Part of each meeting process included a verbal commitment by each participant about what 'action' they would take to address a particular issue within their organization.*

It was also assumed that in light of the apparent isolation experienced by the executive directors, bringing the group together to (a) connect and (b) discuss issues about job quality, would be fruitful to ameliorate some of the isolation while providing support and structure to the members. Such a group would consider the dimensions of job quality that most affect their sense of satisfaction in the job. Therein, the peer learning circle approach was adopted.

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<sup>2</sup> Senge, P. et. al. (1994) *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*. Doubleday: New York

<sup>3</sup> Rogers, Carl. (1961) *On Becoming a Person: A therapist's View of psychotherapy*. Boston: Houghton Mifflin

<sup>4</sup> Knowles, M.S., (1990) *The Adult Learner. A neglected species*. Houston: Gulf Publishing

<sup>5</sup> Brookfield, Stephen D., "Facilitating Adult Learning" (1990) From: Merriam, S. and Cunningham, P. (eds.) *Handbook of Adult and Continuing Education*. San Francisco: Jossey-Bass, 1990

The participants committing to the peer learning circle were supported by two facilitators who took on a range of responsibilities including resource person (for research and administrative purposes), convener, and facilitator of group discussions. One facilitator came with broad nonprofit sector experience and coordinated the research and educational activities of the Institute for Nonprofit Studies. The other facilitator came with extensive adult learning experience as well as cross-cultural experience.

The themes and the sequence in which they were discussed at peer learning circle meetings were determined by the group. Meetings were held once per month for five months and lasted 2.5 hours. The meeting topics were:

- January – orientation to sector statistics, the Human Resources in the Voluntary Sector (HRVS) initiative, the National Learning Initiative and other initiatives related to the project
- February – ED Position Descriptions. Discussion covered each ED's role and responsibilities as well as what enhanced or detracted from job quality and satisfaction.
- March – Organizational Structure. Discussion included the organizational structure shown on the various organizational charts and how that structure impacted service delivery.
- April – Work Relationships and Personal Motivators. Discussion included what motivated EDs as well as the relationships an ED has with employees.
- May – Skill Use and Development. Discussion included new skill development and better applying skills to problems/activities.

The facilitators worked to provide a literature review and structured meeting activities to assist the group with their discussions and information sharing.

### **Sample Peer Learning Circle Meeting Agenda**

Date: Monday, April 19<sup>th</sup>, 2004

Time: 9:30 am – 12:00 pm

1. Welcome
2. Administrative follow-up:
  - Copies of salary survey
  - Consent forms
  - Literature review lists
3. Organizational Structure Debrief
  - Review of worksheet results and action commitments
4. Introduction to Working Relationships & Personal Motivators
5. Review of initial survey results for Working Relationships and Personal Motivators
6. Small Group Worksheet Activity
7. Small Group Key Points: Job Quality vs. Job Satisfaction
8. Next meeting theme, date, location

Part of each meeting process also included a verbal commitment of each participant about what 'action' they would take to address a particular issue within their organization. The 'action' was attached to the particular theme that was up for discussion at that meeting (for example, creating some structural changes following the organizational structure theme meeting). In the subsequent meetings, the participants would again verbally summarize their success or challenge in taking the action they had committed to in the meeting previous. Through these commitments to each other, many new actions were taken with clear, tangible, significant results for the organizations. More information is provided in the results section of this report.

### ***Changes Realized***

In Warren Dow's *Backgrounder on the Literature on (Paid) Human Resources in the Canadian Voluntary Sector*, Wolfred et. al. are quoted with the observation that executive directors who have been with an organization for less than two years generally bring about little 'real' change in the development of an organization. It is further noted that if executive directors stay longer with an organization they will be more successful in influencing the staff, building relationships, and connecting with others who will be strategic to successfully achieving the mission of the organization.

It is accepted that the retention of executive directors and their willingness to accept long term responsibility for an organization is essential for the success of that organization. A critical supplement to the idea, however, is the argument stemming out of the peer learning experience at Mount Royal College. That is that executive director success and retention hinges on the ability of the executive director to connect and share ideas with other executive directors in the sector; to brainstorm solutions to problems with those executive directors, and finally, to simply have the time to stand back from the day to day work to reflect and consider various options before making decisions.

Executive Directors in the project clearly stated that they are sandwiched between internal and external demands, specifically:

- the needs of the clients they serve;
- the board members with whom the future of the organization and its mission resides; and
- the government/funding agencies that affect their ability to carry out the work for their organization.

These demands are becoming more onerous as the needs for programming and service options are increasing or changing, funder expectations for accountability are rising and becoming more differentiated between funders and boards of directors respond to pressures on them by expecting more from the ED. The executive director role is both a fulcrum and a pinch point for decisions, responsibility and exchange of information. All of this and more takes place while Executive Directors simply do not have the time or capacity to take stock of the situation they are working in and to plan ahead for a more effective approach to dealing with the issues that are on the plate.

We have evidence of how the process of the learning circle enabled the Executive Directors who participated to be more effective in their work. In some cases we would even argue that the learning circle raised the awareness of Executive Directors to such a level that their overall satisfaction with their job quality went down because they had acquired new perspectives and knowledge with which to view their role in the organization. For example, a report from Boland and Associates provides data on the salary ranges of executive directors in Calgary's nonprofit sector. Previous to circulating the report, many of the circle participants were not sure of where their remuneration 'fit' with the sector overall. Upon review of the report, many of our participants discovered that they were, on average, not paid fairly and they were able to take the results of the report back to their boards for review. What this means is that the learning experience gave the Executive Directors a new resource tool and new information and contributed to increased discontent related to remuneration. It also empowered EDs to seek a change in their organization rather than remain passive actors within a predetermined structure.

Another example of the learning outcomes is provided by a comparison of the pre- and post-project job quality survey results. In thinking about their satisfaction with pay and benefits, participants at the beginning of the project had the following comments:

- *Salary to be aligned with responsibility and experience.*
- *Salary to be reviewed by major funders.*
- *Board needs to be more thorough with looking at and comparing responsibilities within the organization and the salaries attached to them.*
- *Our funding is based on project funding – this impacts how our salaries are determined.*
- *We don't have established policies for compensation of staff at all levels.*
- *Funders should be paying for a job well-done.*

At the end of the project EDs were asked again to think about their satisfaction with pay and benefits. As a result of the peer learning process, the exchange of information, statistics, reports, resources, and ideas within the group the participants began to take the actions related to enhancing their satisfaction with pay and benefits. Comments showing this are:

- *I have been able to secure group benefits for our staff!*
- *Will be exploring other options for benefits rather than conventional means.*
- *Trying to do something about individual salary.*
- *Shared info from Boland report with treasurer and soon the whole board along with a request to be evaluated each year (this is in my contract but does not happen automatically).*
- *I will not hesitate to go to Board for increase in pay.*

The transition that has occurred and is evident in the example provided here is twofold. First, the pre-project comments are consistently externalized by the ED. The focus is

on what others need to do. In the post-project comments, the responsibility for the situation and actions to create change has very clearly been internalized by the Executive Directors. Second, the confidence, esteem and clarity of what needs to be done has increased to the point where the directors felt comfortable enough to actually take action on an issue that they previously believed should be pursued by either the board or the funding agencies.

Finally, one of the most dramatic actions taken by a group member involved restructuring the services of the organization such that some positions were removed altogether, new service areas were created, and new staff were hired to assist with the administrative functions of the organization. This is a weighty and assertive step that has proven, thus far, to be 'immensely successful' for the organization.

This pattern of having Executive Directors view the elements of job quality and job satisfaction at the beginning of the project as external to themselves and later moving to internalizing the same issues as they sought solutions to the challenges they faced brings up the notion of "locus of control".

## **Locus of Control**

Locus of control is a concept that refers to an individual's perception of what are the main causes of events in life. Simply put, it addresses the question of whether an individual is in control of their destiny or whether it is controlled by others or fate. Locus of control is a belief about whether the outcomes of our actions are contingent on what we do (an internal locus of control) or on events outside of our personal control (external locus of control). Compared to those with a high external locus of control, those with a high internal locus of control:

- have better control of their behaviour and tend to exhibit more political behaviors;
- are more likely to attempt to influence other people;
- are more likely to assume that their efforts will be successful;
- are more active in seeking information and knowledge concerning their situation.

Locus of control is understood to be a bipolar construct in psychology. This project revealed that on some dimensions of job quality, an ED may display an external locus of control while on other dimensions they may display beliefs that demonstrate an internal locus of control. Thus for an ED, the locus of control can vary, shift over time, or remain constant depending upon workplace and especially upon how the role of ED is understood by the ED, the board, staff, volunteers, and others who are external to the organization.

External Locus of Control	Internal Locus of Control
Individual believes that his/her behavior is guided by fate, luck, or other external circumstances	Individual believes that his/her behavior is guided by his/her personal decisions and efforts.

A person's locus of control belief about themselves is also known as an "attribution". Attribution refers to how people explain events that happen to themselves and others. Different kinds of attributional styles have been found to characterize and explain why people react quite differently, but predictably to events and how they explain the causes of those events. In this project, these attributional styles played out in the peer learning circle in two significant ways:

- Priority** – The job quality topics given priority by the learning circle were those with extrinsic characteristics. For example, for most EDs salary is a domain that behaviors associated with an external locus of control are seen. EDs state that funders or the board determine their salary and that they have little control over this domain of job quality. Once EDs made the attribution of salary control to others they typically reacted negatively by suggesting that funders or the board do not really understand the realities of role of the ED. In the learning circle, the salary domain was one of the first discussed.

On the other hand, training, a domain where EDs displayed beliefs associated with an internal locus of control was discussed in the last meeting.

- Disclosure** – It appeared that for several EDs domains of job quality where external attributions were made were easier to talk about than those where EDs might make an internal attribution. For example, personal motivators were more challenging to discuss because EDs needed to disclose behaviors linked to an internal locus of control. Over time, disclosure and discussion of personal responsibility improved because the peer learning circle supported building trusting relationships. Trust and disclosure are closely related in this project: the higher the level of trust, the deeper the level of disclosure; the lower the level of trust, the more superficial the level of disclosure.

A fairly straight forward instrument to identify where an individual's locus of control resides is included in Appendix A. While such an instrument was not used in this project, we feel that the use of such an instrument at the beginning of a peer learning circle may prove to be beneficial to the overall group process.

## Peer Learning Circle as a Process of Learning and Discovery

### What the Literature Says

The notion of a peer learning circle goes back more than 100 years in Sweden where it is firmly entrenched in that society (Suda, 2001)<sup>6</sup>. More than 50% of that country's population engages with what they call 'study circles' during their lifetime. Each circle consists of five to 10 people plus a trained facilitator who work through a course of study and inquiry over at least seven sessions adding up to about 20 hours. Suda found that these study circles utilize the experiences of ordinary people as a starting point for "exploring socially relevant concepts" (p. 3). The group is provided with a study framework, reading material, other resources and structured questions to work through. The circles rely on dialogue that is both democratic and participatory. The facilitator is an equal participant rather than a teacher or keeper of knowledge (Larssen, 2000)<sup>7</sup>. Typically the make up of the group remains constant over the period of time agreed upon beforehand (Wade & Hammick, 1999)<sup>8</sup>.

*For high-level learning to take place, the thinking and interaction within the group must also be of a high cognitive level, characterized by the exchange of ideas, information, perspectives, attitudes, and opinions.*

Central to the learning circle is the achievement of some kind of learning by the participants. Vygotsky (1978)<sup>9</sup> articulated the idea that learning is socially constructed during interaction and activity with others. Research on peer learning (e.g. O'Donnell & King, 1999)<sup>10</sup> has demonstrated that the interaction between members of a learning circle influences the cognitive activity and therefore, the learning that is occurring. For high-level learning to take place, the thinking and interaction within the group must also be of a high cognitive level, characterized by the exchange of ideas, information, perspectives, attitudes, and opinions. This kind of interaction generates a discussion that has thought provoking questions, explanations, speculations, justifications, inferences, hypotheses and conclusions (King, 2002)<sup>11</sup>. As

such a learning circle is a continuous process of learning from experience through to reflection and moving to action. A learning circle helps, "people to take an active stance towards life and helps overcome the tendency to be passive towards the pressures of life and work" (McGill & Beaty, 1993, p. 11)<sup>12</sup>.

<sup>6</sup> Suda, L. (September, 2001). Learning circles: Democratic pools of knowledge. *ARIS Resources Bulletin* 12(2), pp. 1-4.

<sup>7</sup> Larssen, S. (2000). *Is Sweden a learning circle democracy?* Popular Education Conference, University of Technology, Sydney, Australia. Cited in Suda (2001) above.

<sup>8</sup> Wade, S. & Hammick, M. (April, 1999). Action learning circles. *Teaching in higher education*, 4(2).

<sup>9</sup> Vygotsky, L. S. (1978). *Mind in society: The development of higher psychological processes*. Cambridge, MA: Harvard University Press.

<sup>10</sup> O'Donnell, A. & King, A. (1999). *Cognitive perspectives on peer learning*. Mahwah, NJ: Erlbaum.

<sup>11</sup> King, A. (Winter, 2002). Structuring peer interaction to promote high-level cognitive processing. *Theory into Practice*, 41(1).

<sup>12</sup> McGill, I. & Beaty, L. (1993). *Action learning: A practitioner's guide*. London: Kogan-Page.

Giving adults greater control over what they need and want to learn and how they learn it is central to the tenets popularized by Rogers (1969)<sup>13</sup> who asserts that human beings grow in capacity and need to be self-directing. This process of maturing is coupled with our psychological development where the need to take greater personal responsibility for our own lives is essential (e.g. Erickson, 1965)<sup>14</sup>. As mature adults, human beings need to be critical thinkers, problem-solvers, decision makers and be creative in finding solutions (Wade & Hammick, 1999). Burnard (1987)<sup>15</sup> observed that while adults may accumulate a considerable amount of knowledge they may not have had any direct experience of situations about which they might have knowledge of. This difference between “knowing of” and “knowing that” is the gap that can be traversed in peer learning circles. Until an individual has encountered a situation, become engaged in it, and developed their own set of beliefs and feelings about the situation, they have not gained personal knowledge through the experience (Wade & Hammick, 1999). Experiential knowledge is subjective and unique to the individual as well as changeable over time. It combines to form a ‘framework’ (Ausubel et al, 1978)<sup>16</sup> that can be built upon and expanded as life experiences are encountered and reflected upon.

Two of the most important elements of a peer learning circle are the opportunity for reflection and the presence of a skilled facilitator. Brookfield (1993)<sup>17</sup> observes that more effective learning will take place when, instead of engaging in reflection while alone, adults reflect on their experiences while part of a learning circle. In the learning circle conditions for creative problem solving can be created and personal resources such as experience and knowledge can be focused on the issue under consideration by the group. Participants need to develop the skills necessary to both identify their learning needs and use the help being offered by others (Wade & Hammick, 1999). Assisting with the group process (including reflection) is a skilled facilitator. This individual encourages group members to explore, ask questions, critique their perceptions in the light of group input and thereby draw out the meaning within their own experiences (Burnard, 1987, p. 193). Critical thinking skills of learning circle participants are enhanced when the facilitator asks critically oriented questions, identifies critical incidents, supports critical analysis, and provides information requested by the group to make sense out of their experiences and perceptions.

Supporting both reflection and the facilitator is the sense of trust that develops in the learning circle over time. To enable the growth of trust within the group, all participants must come to the learning circle willing to be trustworthy and competent. The facilitator has the role of nurturing the growth of trust by establishing with the group procedural ground rules and monitoring group processes.

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<sup>13</sup> Rogers, C. (1969). *Freedom to learn*. Westerwille: Merrill.

<sup>14</sup> Erickson, E. (1965, 1950). *Childhood and society*. Harmondsworth: Penguin Books.

<sup>15</sup> Burnard, P. (1987). Towards an epistemological basis for experiential learning in nurse education today. *Journal of Advanced Nursing*, 12, pp. 189-193.

<sup>16</sup> Ausubel, D., Novak, J. & Hanesian, H. (1978). *Educational Psychology: A cognitive view*. 2<sup>nd</sup> Edition. New York: Holt, Rinehart & Winston.

<sup>17</sup> Brookfield, S. (1993). *Developing critical thinkers: Challenging adults to explore alternative ways of thinking*. Buckingham: Open University Press.

## The Executive Director Peer Learning Circle

With some slight modifications, all of the information provided by the literature on learning circles was incorporated into the Executive Director peer learning circle convened for this project. Specific components of the ED peer learning circle were:

- 1. Establishing the peer learning circle** – Ten EDs from the contact list agreed to participate with nine starting the project and eight being able to continue through to the end of the project. These numbers are within those suggested by the literature on peer learning circles. Homogeneity is another element addressed in this process. The project group was homogenous in the sense that all participants were active EDs. The group also shared an interest in the topic of job quality and job satisfaction. Two facilitators with complimentary skill sets were identified to assist with the peer learning circle. The location for peer learning circle meetings moved between the different organizations represented allowing for participants to go into the workplaces being discussed during the monthly meetings.
- 2. Building trust** – A first step in building trust was a frank discussion about the confidentiality of information being shared within the peer learning circle. In part this was necessitated by the ethics review process. Such a step is also shown in the literature to be important to creating comfort and trust between participants. Signing a document that specifically states how information will be treated within the learning circle and the limitations to its use outside of the learning circle also contributed to a foundation of trust. Another process that was used to build trust is breaking the large group down into two smaller groups in the second half of each meeting to explore particular topics in depth. The small groups gave a group report to the whole learning circle and this way personal comments could be generalized, more personal time given to issues of concern within the small groups and a chance to develop one-to-one connections offered. For participants with very different viewpoints and experiences within the nonprofit sector, this small-group time also provided an opportunity for more concentrated conversation about the pros and cons of ‘doing things differently’.
- 3. Role of the facilitators** – As suggested by the literature, the facilitators were participants and observers as well as gatherers of information requested by the EDs in the learning circle. Having two facilitators with different albeit related backgrounds, styles of communication, and different roles within the learning circle was a contributing factor to the positive engagement that all participants in the learning circle noted. By taking on the responsibility for setting an agenda, creating focus questions in a worksheet format, and group process, the facilitators freed the EDs from ‘leadership responsibilities’ thereby allowing them to become participants in an open and free-ranging discussion. In some cases, the facilitators modeled critical thinking by going deeper into issues than EDs may have considered. For example, in one session where participants were describing their organizational chart, the facilitators raised questions about

board-staff-client relationships and highlighted assumptions about hierarchically organized staffing models inherent in the nonprofit sector. This discussion led to other discussions about interpersonal relationships in the organizations and an examination of power and authority.

- 4. Development of critical thinking skills** – By the nature of the Executive Director role, the participants had experience with thinking critically. The peer learning circle expanded the domain in which EDs used this skill, especially in the area of thinking critically about one's self in the role of ED. The expansion of critical thinking skills contributed to the observed shift in participants from having an external locus of control towards having an internal locus of control. Evidence as well of the growth of critical thinking skills is the efforts made by participants to take actions to improve their role even though over the course of the project their overall job satisfaction decreased. Instead of becoming increasingly more frustrated, EDs reflected on and found solutions to factors that took away from their feelings of job satisfaction. It appears that participants were better able to critically assess the information being provided and looked for opportunities where changes could be made. In this way, critical thinking provided participants with a tool to emancipate themselves from inherited role assumptions or self-imposed barriers to action.

This project, even though limited in scope, supports the literature on learning circles and provides a direct example of how the learning circle approach can be implemented in the nonprofit sector. As questions are raised about how to best approach learning within the nonprofit sector this project strongly suggests that the learning circle is an approach that offers great promise.

### ***Post-Project Commitments***

The peer learning circle members have each expressed a willingness to continue their experience in the Fall of 2004. They will once again establish their own 'rules of play' including the themes, times, and purposes for their meetings.

This is also indicative of how meaningful the connections established within the peer group are. The Executive Directors in this peer learning experience have gained new understandings about their role and display increased degrees of empowerment. It is unlikely that they will work in the same ways they did before. They want time for their own reflection, dialogue and action-taking. They want to build on the foundations laid by this experience. It is the establishment of this opportunity for reflection, dialogue, and action-taking that has nurtured the enabled, assertive, and confident spirit of the Executive Directors in this project, and, we believe, has contributed to a change in their perception of their job quality and their ability to affect their satisfaction by their own actions.

## RESULTS

### ***General Overview***

The project demonstrated that a peer learning circle process with Executive Directors can be the catalyst for changes in an organization that improve the job quality and job satisfaction of the most senior staff role. The evidence also shows that the attitude of EDs shifts through a peer learning circle approach from an external locus of control to a more proactive or internal locus of control. Combined these two broad outcomes improve the job quality of EDs while also building their resilience to job stressors.

During the course of the project many changes were positive, however, some were not. Exposed to new information and the opportunity to compare and contrast workplace situations, some EDs left the project feeling less satisfied than when the project started. What was gained through the course of the peer learning circle was a genuine sense of empowerment, however, so that even those EDs that were dissatisfied with their jobs had started to talk about what they could do to improve the situation in their organization.

Of the changes that took place in EDs as a result of this project, it is this new found confidence in being able to do something about the situation they are in that is the most profound. The isolation felt by EDs at the beginning of the project was a highly negative factor contributing to a sense of powerlessness and stress for most of the participants. These feelings were especially strong in those seven EDs who did not plan to take on the senior management role that they now found themselves in. Without internal supports, adequate information about how to work effectively as an ED, and without information on the different models of operationalizing their mission, EDs appeared to internalize the stress associated with the range of issues affecting the smooth operation of their organization.

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### ***Notions of Vulnerability***

It was the contention at the beginning of this project that EDs were a vulnerable resource. The term “vulnerable” was not used in discussions because of the negative connotations often associated with the word. Being vulnerable in the context of leaders or organizations suggests a lack of strength or ability to deal with a current situation – that a vulnerable person is somehow “less” than someone who is not labeled “vulnerable”. The research position on the term was that of “exposure to something undesirable,” such as the various stresses associated with low job quality or low job satisfaction. Furthermore, if an ED left an organization, the organization was suddenly

exposed to any number of risks depending upon the nature of unique skills or abilities held by the departing ED. The research was focused on reducing an organization's exposure to risk by understanding and hopefully making suggestions for improving the job quality and job satisfaction associated with the ED role.

The project results suggest that vulnerability in the sense of exposure to the undesirable is a complex set of interrelated factors including:

- **Isolation** – both in terms of being the only person with that role in the organization and being the person at the pinch point between the board and staff.
- **Powerlessness to effect change** – the dominant role of the board in making executive decisions about the organization and the ED's role was common among participants. There was a commonly expressed lack of clarity about the roles and responsibilities of the board and the ED.
- **Tunnel vision** – the lack of opportunity to “step out” of the organization and reflect on how it operates. There are many paths to achieve a goal or the mission however, EDs can be carried along by the current of daily affairs and not have the opportunity to consider other approaches.
- **Everybody's counselor/confidant** – staff and board go to the ED to resolve a variety of personal or interpersonal issues but the ED has no one to turn to for the same support.
- **Compensation** – the way that the organization recognizes and supports the ED was seen to be inadequate by most. While pay was not a dominant determinant on whether an ED stayed or left, it had the potential of being the “final straw.” Work-life balance, work load, recognition, and flexible scheduling all appeared as potential ways that an ED could be compensated.
- **Unreasonable expectations** – Internal and external stakeholders from employees and the board to funders and government, make claims on the ED's time. When resources do not allow for sharing these responsibilities with other staff, the ED bears the load and all of the responsibility.

## ***Reviewing the Findings***

Several broad categories of findings emerged as a result of this project. These are outlined below.

### **The Peer Learning Circle Process**

The peer learning circle was an approach that drew praise from the participants. The opportunity to spend a short but focused period of time with others in the same position brought about a number of direct benefits:

- sharing of information
- sharing of ideas
- problem solving
- debating the strengths and weaknesses of various approaches
- reducing the feelings of isolation and “going it alone”

- development of a circle of peers who will remain as supports to each other beyond the project.

All participants stated that the meetings needed to be focused and relatively short. Within this project the meetings were limited to 2.5 hours once per month for five months and each meeting had a specific topic under consideration. Participants stated that without a clear focus, it would be hard for them to justify the time away from work.

Participants have agreed to reconvene in Fall 2004 to continue the process started through this project. Mount Royal College through the Institute for Nonprofit Studies will continue to facilitate the peer learning circle. Participants also suggested that each one of them invite another ED to the Fall meeting and expand the original learning circle or create a second learning circle.

## **Dimensions of Job Satisfaction and Job Quality**

The Canadian Policy Research Network's report on job quality and job satisfaction in the nonprofit sector was an ideal starting point for the project. The eight dimensions mentioned in the report were validated by participants in this project as being significant to their roles as EDs. Other areas could be added to the eight dimensions based on the findings of this project. A new dimension of job quality is

- *Power* – This new dimension addresses the nature of power in organizations and how different kinds of power can be used to create or support change. Included here are ideas about how the authority and influence of various roles (the board, the ED, other staff, volunteers) work together or conflict. This research demonstrates that when EDs feel that they have the power and support to make change, they demonstrate a stronger internal locus of control, greater overall confidence and increased job satisfaction.

Three areas that expand the existing eight dimensions of job quality are:

- *Sphere of influence* – This extends the understanding of the Job Design dimension of job quality. It explores how the role of the ED influences and works through other positions in the organization. It also addresses how the ED can influence change within the organization.
- *Setting limits* – This also extends the dimension of Job Design. It addresses ways to set out and realize clarity in the role of the ED. It also addresses the way(s) in which an ED may work to establish their own limits in terms of role, responsibilities and reporting relationships.

- *Establishing supports* – This extends the dimension of Organizational Structure. It addresses the creation of support mechanisms for staff, board and the ED. It also includes approaches that the ED may implement to address the “counselor to everyone” experience reported in this research.

## **Actions Resulting from the Project**

Regardless of whether the project positively or negatively impacted an ED’s job satisfaction, most participants took actions within their organizations to improve their situation. Within each of the eight dimensions of job quality, these included:

1. Extrinsic Rewards
  - taking steps with the board to address salary issues based on information provided in the peer learning circle
  - commitment to creating linkages between performance, salary and benefits
  - securing group benefit plan
2. Hours and Scheduling
  - increasing delegation of responsibilities within the organization
  - increasing ability to address time management issues
  - clarifying roles and responsibilities with the board
  - increasing flex time
  - reduction in the number of meetings
  - getting the board to do board business
  - establishing time for thinking, reading, and planning
  - talking to main funder about getting resources to hire extra staff
  - getting board committees to function better
  - creating work-life balance
3. Employment Relationships
  - securing funding to review strategic plan and identify staffing and other requirements
  - changing the organization’s structure to define person to person or position to position relationships
  - increasing board training with an eye to improving board-staff relations
4. Organizational Structure
  - reorganizing and changing the number of staff
  - reorganizing and changing the roles and responsibilities of staff
  - increased participation in decision making
  - reflecting on other organization structures
  - recognizing that the hierarchy of the organization has a negative impact on job satisfaction

- creating an alternate organization structure
  - encouraging participative decision making
  - delegating work
  - monitoring results
5. Job Design
- rewriting the job description to include more administrative time and less program time
  - instituting performance feedback mechanisms
  - re-evaluation of the ED's personal role
  - re-allocating work load
6. Intrinsic Rewards
- giving more recognition to staff and board
  - discussing concerns and ideas for improvement with the board
  - recognizing personal limits
  - reflecting on small victories
  - remaining inspired

The areas of Skill Use and Development and Health and Safety did not appear to generate actions within the organization. Given that the peer learning circle chose to focus on the six areas above, these two may not be high priority at this time.

## **General Trends in Job Satisfaction**

Comparing the elements that produced the greatest or least job satisfaction over the course of the project generated a couple of interesting trends.

In terms of the elements of job quality that provided the highest job satisfaction, two areas remained consistent throughout the project:

- Personal Motivators
- Work Relationships

Clearly the “cause” and the “people” are strong determinants of job satisfaction. Strong affiliation with the cause of the organization sustains EDs. While some participants felt that there was a limit to the positive effect of a strong connection with the cause of the organization, most cited this as a primary driver of job satisfaction. Likewise, relationships within the workplace also play a central role in job satisfaction.

The element of job quality that is most dissatisfying for EDs across the span of the project was Pay and Benefits. It is interesting to note that at the beginning of the project the other two most dissatisfying elements were Job Design and

Organizational Structure. At the end of the project those had improved and been replaced with two new areas of dissatisfaction: Skill Development became the most dissatisfying followed by Pay and Benefits and Hours and Scheduling as the other two most dissatisfying elements. This change became apparent in the results of the post-project survey and could be due to the number of actions taken by EDs to address their job description and the structure of the organization. With these being addressed, EDs appeared to be more satisfied. Another explanation for the changes could be that Hours and Scheduling and Skill Development required a time period greater than the length of the project to address adequately. Yet another possible explanation is that Skill Development for members of this peer learning circle became a highly valued determinant of job satisfaction. The peer learning circle itself raised expectations of how skills could be developed and therefore EDs engaged in the process became more critical about other kinds of skills development opportunities or the lack of them.

## Summary

The peer learning circle appears to be a catalyst for action. Ideas that emerged could be examined by other EDs and information could be gathered to support the new direction being considered. The number of tangible actions taken by EDs to address job quality and job satisfaction as a result of this project is significant. In some cases, EDs restructured the organization from top to bottom, something that was out of their reach prior to the project. Central to the effectiveness of the peer learning circle approach is the creation of a zone of safety and comfort within the group. External facilitators and the consent agreements were important first steps in creating the right environment.

As a forum for safe dialogue and information exchange the peer learning circle addressed a deep seated need of EDs to connect with their peers around the nature of their roles. Several participants commented that when they had been with other EDs in the past, the focus was on collective action on a common cause or other specific purposes related to their organization's activities. The peer learning circle connected EDs at a more reflective level with an emphasis on how they actually carried out their role and responsibilities.

Perhaps most central to the idea of strengthening the role of Executive Director is ensuring a strong and enduring commitment to the cause of the organization and a dynamic foundation of work relationships. If these two areas are not major components of an ED's experience, then the issue of pay and benefits could be the determining factor in whether or not the ED stays or leaves the organization. This suggests that boards may need to take on an explicit role in developing the linkages that the ED has with the cause, the people and the board itself.

While this research has answered a number of questions on how to improve the job quality and job satisfaction of Eds, it has also raised other questions on how the

relationship between the board and EDs can be strengthened for the long term sustainability of the organization. It is hoped that future research will address these new questions.

## APPENDIX A – ROTTER'S LOCUS OF CONTROL SCALE

Rotter, J. (1966). Generalized expectancies for internal versus external control of reinforcements, *Psychological Monographs*, 80, Whole No. 609.

Select one answer from each of the pairs of choices below.

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1.    a. Children get into trouble because their parents punish them too much.  
      b. The trouble with most children nowadays is that their parents are too easy with them.
  
2.    a. Many of the unhappy things in people's lives are partly due to bad luck.  
      b. People's misfortunes result from the mistakes they make.
  
3.    a. One of the major reasons why we have wars is because people don't take enough interest in politics.  
      b. There will always be wars, no matter how hard people try to prevent them.
  
4.    a. In the long run people get the respect they deserve in this world  
      b. Unfortunately, an individual's worth often passes unrecognized no matter how hard he tries
  
5.    a. The idea that teachers are unfair to students is nonsense.  
      b. Most students don't realize the extent to which their grades are influenced by accidental happenings.
  
6.    a. Without the right breaks one cannot be an effective leader.  
      b. Capable people who fail to become leaders have not taken advantage of their opportunities.
  
7.    a. No matter how hard you try some people just don't like you.  
      b. People who can't get others to like them don't understand how to get along with others.
  
8.    a. Heredity plays the major role in determining one's personality  
      b. It is one's experiences in life which determine what they're like.
  
9.    a. I have often found that what is going to happen will happen.  
      b. Trusting to fate has never turned out as well for me as making a decision to take a definite course of action.
  
10.   a. In the case of the well prepared student there is rarely if ever such a thing as an unfair test.  
      b. Many times exam questions tend to be so unrelated to course work that studying is really useless.

11.
  - a. Becoming a success is a matter of hard work, luck has little or nothing to do with it.
  - b. Getting a good job depends mainly on being in the right place at the right time.
12.
  - a. The average citizen can have an influence in government decisions.
  - b. This world is run by the few people in power, and there is not much the little guy can do about it.
13.
  - a. When I make plans, I am almost certain that I can make them work.
  - b. It is not always wise to plan too far ahead because many things turn out to be a matter of good or bad fortune anyhow.
14.
  - a. There are certain people who are just no good.
  - b. There is some good in everybody.
15.
  - a. In my case getting what I want has little or nothing to do with luck.
  - b. Many times we might just as well decide what to do by flipping a coin.
16.
  - a. Who gets to be the boss often depends on who was lucky enough to be in the right place first.
  - b. Getting people to do the right thing depends upon ability, luck has little or nothing to do with it.
17.
  - a. As far as world affairs are concerned, most of us are the victims of forces we can neither understand, nor control.
  - b. By taking an active part in political and social affairs the people can control world events.
18.
  - a. Most people don't realize the extent to which their lives are controlled by accidental happenings.
  - b. There really is no such thing as "luck."
19.
  - a. One should always be willing to admit mistakes.
  - b. It is usually best to cover up one's mistakes.
20.
  - a. It is hard to know whether or not a person really likes you.
  - b. How many friends you have depends upon how nice a person you are.
21.
  - a. In the long run the bad things that happen to us are balanced by the good ones.
  - b. Most misfortunes are the result of lack of ability, ignorance, laziness, or all three.
22.
  - a. With enough effort we can wipe out political corruption.

- b. It is difficult for people to have much control over the things politicians do in office.
23. a. Sometimes I can't understand how teachers arrive at the grades they give.  
b. There is a direct connection between how hard I study and the grades I get.
24. a. A good leader expects people to decide for themselves what they should do.  
b. A good leader makes it clear to everybody what their jobs are.
25. a. Many times I feel that I have little influence over the things that happen to me.  
b. It is impossible for me to believe that chance or luck plays an important role in my life.
26. a. People are lonely because they don't try to be friendly.  
b. There's not much use in trying too hard to please people, if they like you, they like you.
27. a. There is too much emphasis on athletics in high school.  
b. Team sports are an excellent way to build character.
28. a. What happens to me is my own doing.  
b. Sometimes I feel that I don't have enough control over the direction my life is taking.
29. a. Most of the time I can't understand why politicians behave the way they do.  
b. In the long run the people are responsible for bad government on a national as well as on a local level.
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**Score one point for each of the following:**

2. a, 3.b, 4.b, 5.b, 6.a, 7.a, 9.a, 10.b, 11.b, 12.b, 13.b, 15.b, 16.a, 17.a, 18.a, 20.a,  
21. a, 22.b, 23.a, 25.a, 26.b, 28.b, 29.a.

A high score = External Locus of Control

A low score = Internal Locus of Control