



The Courage to Pause

Lessons Learned from CRE's Leadership Caucus

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**"The real voyage of
discovery consists
not in seeking new
landscapes but in
having new eyes."**

- Marcel Proust

CRE 
Community Resource Exchange



power LEADERSHIP
courage pause
TRANSFORMATION

CONTINUOUS learning
impact authenticity
discovery interactions

More than 400 nonprofit leaders come through CRE's door each year. In the midst of this heavy consulting workload, we engaged 67 leaders over the last three years in four Leadership Caucuses. The Leadership Caucus is CRE's nine-month leadership development program. These leaders, in turn, took the "courage to pause" from what seemed like an impossibly crowded schedule to truly participate in the caucus experience. For these leaders, taking time off from their pressing and high priority activities to pay some attention to their own needs felt uncomfortable. But they had the courage to do just that. More importantly, they had the courage to delve deeper into what felt to them like the uncharted and fuzzy universe of leadership issues.

Our observations from these four caucuses are enriched by the fact that approximately 80% of participating leaders come from organizations that are also CRE consulting clients, allowing both us and them to connect the dots between personal leadership objectives and organizational effectiveness goals. Equally significant, the Leadership Caucus has reinforced our belief that the nonprofit sector has a tremendous leadership talent pool. Rather than the much-discussed issue of a leadership deficit in the nonprofit sector, we see the critical issue as the shortage of sector-relevant, high-impact, non-episodic leadership development opportunities. The nonprofit sector's leadership pipeline can be made robust by a greater investment in leadership development. The Leadership Caucus is CRE's investment towards feeding the leadership pipeline.

The Leadership Bar

Nonprofit leaders face increasing complexities in their efforts towards long-term effectiveness. If there once was a time when passion for making a difference spelled leadership, now it is no longer enough. The leadership bar continues to rise. And raising the leadership bar has become an imperative. The leadership challenge has changed from simply focusing on survival to creating innovation. It has come to mean navigating complex change, connecting

layers of stakeholders, attending to demonstrable outcomes, and continuously building teams. A survey conducted by the Center for Creative Leadership (CCL), the 2007 *Changing Nature of Leadership*, concluded that the complexity of challenges leaders now face are no longer responsive to the usual solutions, driving the need for new approaches. It also found that to be effective in the future, leaders will need to develop new skills, the top four of which are collaborating across boundaries, leading change, building effective teams, and exercising influence without authority.

More fundamentally, the leadership challenge has also come to mean being more in tune with one's personal leadership. Common wisdom says that leadership is the glue that holds the organization together. Indeed, the vital role of leadership in the effectiveness, growth, and innovation of nonprofit organizations as reflected in the sector literature is headlined in one key message: Leadership can make or break an organization.

The nonprofit sector's leadership pipeline can be made robust by a greater investment in leadership development.

Practitioners and thinkers in the field drum up the same message. "Leadership is the key. We need intuitive, service-oriented, visionary leaders to set the tone and provide the example for those they lead. They must be role models for the change they want to see." (Block) Nanus and Dobbs proposed: "Without great improvements in leadership it is unlikely that nonprofit organizations will be able to meet the challenges they face, and the cost of their failure could very well be measured in a lower quality of life for everyone." (Nanus and Dobbs)

Adding to the increasingly complex demands in nonprofit leadership and the changing requirements for leadership effectiveness, a shortage of next generation leaders is predicted. It has been pointed out that the sector will need more leaders in the years ahead.

“In the decade ahead, nonprofit organizations will need an exceptional number of new leaders every year — numbers far greater than in the past...” (Tierney)
 “The survey confirmed that the nonprofit sector in New York can expect a massive leadership transition over the next five years.” (Birdsell & Muzzio)

Shortage of What?

The question of whether there is a leadership deficit in the nonprofit sector has been the buzz for a while now. The question we would rather ask is, shortage of what? Given CRE’s more than 25 years of experience working with nonprofits, we are convinced that there is no shortage of leadership talent in the sector. Even if three out of four nonprofit leaders tend to leave their jobs within five years, 70% stay in the nonprofit sector. (Bell, Moyers, and Wolfred)

Given CRE’s more than 25 years of experience working with nonprofits, we are convinced that there is no shortage of leadership talent in the sector.

Our position is that the perceived shortage exists because the sector has not invested enough in leadership development. The significant increase in CRE’s client engagements on leadership and human resources issues has given us ample information that there is a critical, and at times urgent, need for strengthening leadership and management competencies. Even when our consulting engagements involve strategic planning, fundraising, fiscal restructuring, and board development issues, we also encounter the need to address leadership issues 99% of the time.

In a sector that is constantly concerned with sustainability, setting aside hard-won funding — not to mention valuable staff time — for leadership development seems such a luxury. But we are warned that this is being short-sighted. “The number one resource for a great social sector organization is having enough of the right people willing to commit themselves to the mission...Investment includes time as well

as money. It takes long, hard work to build an excellent leadership team.” (Collins)

Exacerbating this situation is the paucity of high impact and sustained leadership development experiences for nonprofit leaders. The literature does indicate that we need to explore new approaches to leadership development. The traditional vehicles for leadership development have been challenged as the environment in which nonprofit leaders operate has become more complex and subject to constant shifts. “Emerging new perspectives on the nature of leadership may profoundly affect our thinking about leadership development. Increasingly, leadership and leadership development are seen as inherently collaborative, social, and relational processes.” (Day)

Convinced that there is a projected shortage of access to high quality, cost-effective, sector-relevant, and non-episodic leadership development programs, CRE launched its Leadership Practice in 2002 and the Leadership Caucus in 2004. The goals of these initiatives are to strengthen the leadership capabilities of nonprofit leaders and to feed the leadership pipeline in the nonprofit sector. Figure 1, on page 10, provides an overview of CRE’s response to leadership development. Figure 2, also on page 10, briefly describes the thinking behind the CRE’s Leadership Caucus.

This paper tells the story of the Leadership Caucus and the layers of lessons CRE learned from it — some about designing leadership development experiences, some about who might benefit most from these opportunities, a lot about what our nonprofit leaders grapple with each day, and some about those overarching factors that impact leadership development. This occasional paper focuses on the four overarching themes that emerged consistently throughout the four caucuses.

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“Overwhelmed-ness”

“Overwhelmed-ness” is a condition that nonprofit leaders seem to live with every day. Setting priorities therefore becomes a challenge. One Leadership Caucus participant put it this way: “There are priorities about me and my wellness. That’s not a sidebar that I’ll get to if I can, and that has so many repercussions.” Our years of experience with nonprofit organizations paint a picture of nonprofit leadership that is under high levels of stress and in frequent crises. It is a landscape where change is a way of life.

Although it seems counter-intuitive to engage overwhelmed CBO leaders in an almost year-long commitment, we sensed that one answer to this “overwhelmed-ness” was to break the cycle — to offer them the time and space to pause. Our decision paid off. Here are some participant comments:

“What was evident to me throughout was the necessity for a good leader to find those “spaces” that allow for a “breath.” Crises come and go and there will always be a new “imperative” and a difficult decision to make — that won’t change, but how we choose to respond to it can.”

“I think it was really a worthwhile experience...it’s really important to be able to step back from your day-to-day routine, reflect on issues you’re confronting, hear from others...”

“I always left feeling invigorated...It was a real privilege to set some time aside to be thoughtful about what you do in the presence of other talented people... (We learned) the value of reflection in a very busy schedule...The more conscious and deliberate we are about key decisions and process, the better.”

high quality
LEADERSHIP
development
cost-effective
NON-episodic



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Lessons Learned

CRE's Leadership Caucus seeks to create a stimulating forum:

- » **To discuss the most challenging leadership and management issues in today's environment of increased accountability;**
- » **To reflect on the impact of leadership and management practices on the effectiveness of nonprofit organizations;**
- » **To enable leaders to act on changes they want to make and to practice new skills and behaviors in a supportive and challenging space; *and***
- » **To support the application of principles and tools from current thinking in leadership and management to the leaders' own organizations.**

The Leadership Caucus goes beyond skill building, although it can and has done just that for some participants. It goes beyond concepts and theories, although they are used to trigger discussions. The essence of the Leadership Caucus is to create such a forum to achieve the aforementioned goals, so that the impact of this nine-month leadership development experience is really about generating some level of:

- **Personal transformation;**
- **Commitment to organizational improvement; *and***
- **Desire for continuous learning about leadership.**

The lenses we used to gauge these three outcomes are observational and anecdotal. As the Kellogg Foundation study on "Evaluating Outcomes and Impacts of Leadership Development Programs" states: "An impact of leadership programs that is difficult to fully appreciate during the course of the program,

but which is frequently reported anecdotally post-program, is the transformation people experience in how they feel 'called' to lead." (Kellogg Foundation) The caucus participants' Personal Leadership Statements, personal narratives that they shared at the closing session of the Leadership Caucus, provide rich examples of organizational improvement initiatives and a renewed desire to attend to leadership growth.

Our observational data comes from the richness of the interactions and the reflections that participants share during the caucus, specifically in the Management Simulation, the Action Learning Team Sessions, and the 360 Feedback and Coaching Sessions.

So what have we learned? From the four Leadership Caucuses that we have conducted so far, our observations, interviews, and anecdotal data have led us to these four lessons:

Lesson 1

Intentional pause is the wellspring that feeds personal transformation.

Lesson 2

Candid conversations nurture commitment to change.

Lesson 3

Relying less on power makes one more powerful.

Lesson 4

Risking vulnerability increases learning.

Lesson I

Intentional pause is the wellspring that feeds personal transformation.

"I often found myself deep in thought, during the session and afterwards, about situations and challenges I am facing and have found a new sense of clarity about how to tackle them."

The single most profound thing we learned was that intentional pause, triggered by having been part of the learning community that is the Leadership Caucus, enabled participants to talk about things that matter, to reflect with peers, to reshuffle old paradigms. The depth of reflection that the caucus experience enabled the participants to reach in turn generated different levels of personal transformation. By personal transformation we mean recognizing that nothing will happen around me unless something changes in me. The cultural norm for nonprofits is one of sacrifice. Stopping and reflecting can often be interpreted as putting one's own interest above that of clients or staff.

In the Leadership Caucus, the first challenge is to create a sense of entitlement and necessity about pause. We introduced literature that values reflection. In *Resonant Leadership*, Boyatzis and McKee describe this transformation eloquently: "People who think they can be truly great leaders without personal transformation are fooling themselves. You cannot inspire others and create the resonant relationships that ignite greatness in your families, organizations, or communities without feeling inspired yourself, and working to be the best person you can be. You must be the change you wish to see."

Nanus and Dobbs point out that: "Apart from learning from books and experiences, leaders learn by self-reflection, as they assess their own strengths and weaknesses to determine what works for them and what doesn't." Here are some inspiring glimpses of the beginnings of "personal transformation" and the value of intentional

pause as expressed by caucus participants:

"All of these things (principles and ideas) are just tools. The frontier is more spiritual in nature. At some point, there are elements that you can touch, feel, see, but there are things you create by your intention, by connecting with other people. Willing things into being..."

"I found it extremely helpful to take the time to reflect on what was important to consider in my own (transition) process, particularly in the area of support and clarity."

Does it matter that some level of personal transformation occurs in leadership development? If we accept that personal transformation means recognizing that nothing will happen around me unless something changes in me, and that leadership is all about navigating change, then leadership development efforts must engender personal transformation. If personal transformation moves us to be, as Gandhi said, "the change we want to see," then organizations are served well by the opportunity for their leaders to be part of a transformative leadership development experience.

The same survey cited earlier by the Center for Creative Leadership on the changing nature of leadership reports 10 trends regarding business and leadership. One of the trends is "authenticity is the next celebrity." It states: "...only 50% of respondents believed senior leaders are currently able to be authentic in their role. Because trust and respect are vital in the workplace, developing these skills for the future will be essential to keeping the workforce engaged and committed over the long term."

If we believe that personal transformation leads to authenticity, then leadership development that provides transformative opportunities serves the leader, the organization, the workforce, and the future well.

Indeed, one concrete outcome of the Leadership Caucus is that one participant – who had been contemplating leaving the organization – decided to stay. In his Personal Leadership Statement, he said:

“I realized that part of my sense of burnout was that I had come up against (overlapping) challenges that were (both) professional and personal. I realized I had a choice. I could deal with those in this organization, or I could leave and run up against them again somewhere. It wasn’t a case of the organization needing new leadership — but (my) need (for) a new approach.”

Lesson 2

Candid conversations nurture commitment to change.

“(The Leadership Caucus was) excellent. An opportunity to hear from others and to feel that some of the concerns and issues that we were having were similar to those of others, to hear about other alternatives...the “I’m not crazy” experience...to be able to interact and exchange ideas.”

The second lesson is that each caucus forms a microcosm that is unique to each cohort. This microcosm becomes a safe container and a powerful vehicle for creating a circle of candidness among peers. It breaks the isolation that many nonprofit leaders feel. Realizing that they are not alone in their leadership challenge, that it is okay to say “I don’t know what to do,” and that they now have an ally in each other — we saw that all these opened up pathways for them to find their way through the change initiatives of their choice and to move them forward more successfully. The Kellogg Foundation study cited earlier states that: “Some of the most powerful and enduring outcomes of leadership programs

are the relationships that are formed between participants in the program.”

We are all familiar with the “lonely-at-the-top” syndrome. This scenario is much talked about as a positional hazard in the case of corporate and business CEOs. In the nonprofit world, though it has less hierarchy and a more collegial work environment, an appreciation of knowing that “I am not alone at the top” is nonetheless a significant theme. The candidness and the willingness to be vulnerable on the part of some participants during the caucus sessions spawned a bond that enabled them to share concerns more openly, to think things out, to be open to new ways of doing things, and to try out new behaviors. The connections that were ignited were visible. And the bond continues even now.

The caucus participants expressed appreciation for this circle of candidness as follows:

“It was interesting to be in a diverse group of leaders of varying ages and experiences, and reassuring to know that many of the challenges I am experiencing are just universal in nature and go with the territory.”

“I really saw the need for a close circle of people to be candid with, people not bogged down with their own agendas... (They helped me) decide to take someone on. It was risky, but it has definitely worked.”

“The peer support, peer learning process was helpful; people were open and honest, really helpful to hear people talk about their Boards, about trying to hire a CFO. Very useful...”

One concrete outcome of the Leadership Caucus is the continuing peer exchange that participants have initiated after each caucus. One group decided to continue to meet on their own. They now

call each other to simply touch base or to consult each other. In one case, a caucus alumna needed some quick comparative information for a board meeting. She emailed her caucus cohort for help, and the replies were immediate, sharing with her relevant information that she needed.

Lesson 3

Relying less on power makes one more powerful.

We observed that the less the participants relied on power derived from organizational position, the more power (defined as influence) they had. This third lesson surfaced for CRE primarily, but not exclusively, from our observations of the Management Simulation, one of the highlights of CRE's Leadership Caucus. In *Living Change — A Management Simulation*, participants assume different roles running a nonprofit struggling with difficulties surrounding managing change and other leadership issues. The simulation realistically replicates a challenging day in nonprofit management, requiring participants to make difficult decisions under pressure, to communicate effectively, and to work as a team. Highly interactive, participants are able to try out new behaviors in a low risk environment as they assume different management roles. Participants are observed as they lead and manage a nonprofit that is in the throes of change.

We saw that participants who did not get stuck with figuring out their leadership position in the simulation, or who were not compelled to stay within the confines of their management role, in fact wielded greater influence and power during key decision points. It seems paradoxical that the less they relied on power, the more powerful they became. And as the change dilemmas presented themselves during the simulation, the reality of this paradox became more pronounced. In *The Art of Chaordic Leadership*, Dee Hock describes this paradox: "True power is never used. If you use power, you never really had it. Chaordic leaders focus upwards and sideward

as well as downward. They do not dictate; they modify conditions that prevent synergy and accomplishment." In the CCL survey cited earlier, the collaborative approach to leadership — one that does not depend on position power, uses interdependent decision making, and seeks buy-in — came out as the highest ranked leadership skill needed for the future.

One participant shared her insight about what position power may have meant in her organization:

"The Simulation allowed me to experience what some of my staff probably feel more often than I would like to admit, and it is a feeling of isolation and not being informed about why decisions are made or even being asked to participate in many decisions."

The subject of exercising power was a subtext during the action learning and issue-based discussions. Questions surfaced such as: How does one change the Board's culture, perspective, and practices when they are suppose to lead the organization? How does one hold the staff accountable for outcomes when their plates are so full? How can one demand results when the organization can't provide the necessary resources?

"As a result of this (Leadership Caucus) experience, I have had the time to examine closely some of the reasons I have not been able to create an executive team in the way I deemed fit for the agency."

In *Leadership and Spirit*, Russ S. Moxley proposes an alternative: "Here's an alternative: understanding and practicing leadership as partnership. The idea of partnership suggests the basic concept of two or more people sharing power and joining forces to move towards accomplishment of a shared goal....

Partnership-as-leadership is not a new practice, but we are so accustomed to executive-as-leader that when we see or experience partnership-as-leadership, we don't consider it to be real leadership."

Using organizational structure as a lens, it may be that leaders need to rely less on a pyramidal power structure, but rather lead from within a star-like structure, a constellation of stakeholders all around them instead of above or below them. This structure recognizes that power relationships are constantly shifting and that partnerships enable goal accomplishment more effectively, especially when navigating change efforts.

In *Presence*, Senge, et.al. state: "As models of leadership shift from organizational hierarchies with leaders at the top to more distributed, shared networks, a lot changes. For those networks to work with real awareness, many people will need to be deeply committed to cultivating their capacity to serve what's seeking to emerge." Collins alludes to this as well when he writes: "Social sector leaders are not less decisive than business leaders as a general rule; they only appear that way to those who fail to grasp the complex governance and diffuse power structures common to social sectors."

Some concrete outcomes related to the exercise of power were expressed by participants as follows:

"As a result of this (Leadership Caucus) experience, I have had the time to examine closely some of the reasons I have not been able to create an executive team in the way I deemed fit for the agency."

"The session on succession planning provided an opportunity for me to explore transition from a different perspective... the application of the concept to our Board."

In both cases, the realization was that collaboration and partnership-as-leadership, rather than positional power, was the key to achieving their respective goals.

Lesson 4

Risking vulnerability increases learning.

The fourth lesson is an offshoot of the same microcosm described earlier — the fact that the Leadership Caucus becomes a world that the participants create, with its own set of interactions, dynamics, and expectations, and a safe space that fosters authenticity. What we learned is that participants who truly and authentically participated in this microcosm by opening themselves to this learning experience, by fully engaging in the life of the caucus, and by allowing themselves to be vulnerable about their leadership struggles, ended up not only learning more, but also exercising greater influence within the caucus. This openness to learning is characteristic of imaginative leaders.

The nine-month timeframe is critical to developing the "space" that allows participants to get to know each other, to form connections, to probe more deeply about shared issues, and to increase their comfort level about expressing vulnerabilities.

Each caucus is different precisely because the actors are different. Dyads and triads of participants bond with each other, providing support to each other outside of the caucus sessions. Leadership behaviors, not obvious at the start of the caucus, emerge as the participants gain more confidence in the caucus setting and try out new behaviors in a safe environment. The nine-month timeframe is critical to developing the "space" that allows participants to get to know each other, to form connections, to probe

more deeply about shared issues, and to increase their comfort level about expressing vulnerabilities. Some comments to this effect are:

“The Leadership Caucus experience was, for me, about opportunities – opportunities to learn, grow, challenge myself, network and, finally, acknowledge — or, therefore, extend — my own capabilities...to learn in a safe, supportive environment that is judgment free, but still challenging to us in terms of our decisions-making process.”

“(I) also appreciated the environment they (CRE) and other EDs created naturally... it was so clear that we all understood what we were all experiencing....allowed us to test out things we believed, or were troubled by.”

“I appreciated that supportive group-ish aspect as much as the appropriate topics for leaders, to my surprise...”

“(The caucus) addressed those topics in a way that allowed us to be open to learning on all kinds of deeper levels.

“For one who became an “accidental leader”...the opportunity to dissect and explore leadership and management topics specific to nonprofit organizations has been a wonderful and enriching opportunity.”

Imagining the Possibilities

The long-term impact of the Leadership Caucus has yet to be determined. CRE's Measuring Impact Study will be one vehicle. A study on the intermediate impact of the four Leadership Caucuses is also on the drawing board. In the meantime, CRE is preparing for its fifth Leadership Caucus. One thing we are confident about is the remarkable leadership talent in the nonprofit sector and the undeniable need for greater investment in leadership development.

As we think about the longer-term possibilities that the Leadership Caucus may inspire in our CBO leaders, we are heartened by some early outcomes, such as:

“My transition plan will be quite different the second time around based on my experience and the caucus discussions and readings...”

“I have pulled back on a couple of commitments to be able to be more internally effective and available. There's a pretty direct correlation between that and the caucus.”

“Something about his presentation made me shift the way I approached a division head...it opened the discussion up very differently from the previous discussions. It certainly worked.”

We continue to make improvements in the Leadership Caucus. We are mindful that: “We are constantly confronted with the difficulty of acting on our idealism and pursuing an unreachable depth, and are left with little more than a paradox: the idea that for every great idea, there is an opposite idea that is also true.” (Block)



continuous
IMPROVEMENT

FIGURE 1

CRE's Response to Leadership Development

Cognizant of the vital role of leadership in organizational performance and capacity building, CRE launched its Leadership Practice in 2002 and the Leadership Caucus in 2004. The goals of CRE's Leadership Practice are:

1. To provide nonprofits and CBOs cost-effective access to best practices and state-of-the-arts thinking on leadership and management issues, thereby re-generating and sustaining the leadership capacity of their organizations; *and*
2. To ensure that the nonprofit sector's leadership pipeline is well primed with the next generation of leaders.

The Leadership Practice rests on "three posts" :

- Integrated leadership coaching within our consulting work, meaning that we keep an eye on leadership behaviors and practices while we assist CBO executives in addressing their priority capacity building issues;

- Leadership development through the Leadership Caucus, where change initiatives are guided and informed by issue-based discussions, peer exchange, 360 feedback, action learning, and a management simulation experience; *and*
- Consulting engagements focused on strengthening leadership and management teams.

Approximately 80% of the participants in CRE's Leadership Caucus are also consulting clients. This creates the opportunity for deeper impact when we are able to work with one client using multiple interventions. It also enables us to work not only with Executive Directors but with the entire management team, thereby building leadership below the top position. The "constellation" of learning opportunities within the Leadership Caucus, combined with our consulting relationship, creates an integrated and high-impact approach to strengthening leadership as well as organizational effectiveness.

FIGURE 2

CRE's Leadership Caucus

In response to the lack of access to high quality, cost-effective and sector-relevant leadership development programs for nonprofits, CRE began to offer the Leadership Caucus in 2004. We wanted to develop a leadership development experience that had the following features:

- One that reflected the "leadership life" of the participants — their issues, their priorities, their challenges, their frustrations;
- One that enabled them to work through a priority change initiative with their peers;
- One that took the best from what has worked before in terms of activities, format, and design;
- One that subscribed to the best practices relevant to nonprofits; *and*
- One that had the potential to connect to different learning styles.

The content of CRE's Leadership Caucus was shaped by three factors:

1. CRE's shared knowledge of, and deep experience with, issues that CBO leaders face;

2. Testing of ideas and issues with potential participants before each caucus begins, *and*

3. Extracting relevant literature on leadership best practices and significant sector trends.

The design of the caucus, on the other hand, took into account the literature on leadership development. The learning style of individuals varies. Some learn best through discussions, and others through case studies; some through trying out something new and different, and still others from feedback.

They also connect differently to different issues. It was therefore important to situate the issues, ideas, and content materials in several "learning channels" — issue-based facilitated discussions, action learning team assignments, coaching session based on a 360 feedback survey on leadership practices, management simulation, and case studies. Indeed, the participants' comments bore this out.

At the same time, we realize that "ultimately...the encouragement and development of leadership skills rests with the individual's own motivation and talent and with the receptiveness of their organizations to support and coach such skills. This leaves a lot to chance. Practicing new behaviors requires willpower, patience, and persistence — difficult in the face of a busy day." (Conger)

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RE-GENERATE
caucus design
constellation
learning
opportunities



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