

summary of regional
roundtable discussions

trends [4]

Following the publication of our December 2009 edition of Philanthropic Trends Quarterly in which we explored the issue of cost of leadership development in the not-for-profit organizations and institutions, KCI held Regional Roundtable Discussions across Canada to further explore this crucial topic. Roundtables were held in Vancouver, Greater Toronto Area (4), Kitchener-Waterloo, Montreal, Ottawa (2), Halifax, Winnipeg and Moncton.

Many thanks to who attended and shared their experiences and ideas. The following is a summary that combines and paraphrases comments and input from the various Roundtable participants.

With regards to those formative experiences and/or contributing elements in one's own leadership development journey, participants made these comments:

- Having my supervisor ask me to step up into a leadership role was fundamentally important because it demonstrated their faith in my abilities and potential. This helped me both to build my confidence, and also encouraged me to consider a role and career path that I had not considered previously.
- I looked to several professional role models who I aspired to learn from and emulate. In some cases this role model was part of my organization, and in other cases I looked to people in other organizations and parts of our sector.
- There was a board member with whom I worked very closely. Not only was she a great role model as a leader, she was instrumental in helping me to learn about the business of running a charity, in particular the people and financial management aspects.
- Working in a small shop forced me to learn and develop a breadth of skills and allowed me to see how the various elements of an organization tie together.
- By taking formal education in management, I feel that I was able to add some crucial missing pieces to round me out as a leader.
- Early on in my career I had a VP who asked me where I saw myself in 10 or 20 years. He didn't laugh or put me down when I told him that I'd like his job one day. Instead, he spoke honestly and frankly about what it would take, and about what he knew then that he wished he'd known when he was my age. Fifteen years later we are still in touch, and he is still cheers me on.

Participants made the following comments about their organizations current investment in and expenditures for leadership development:

- As I think about it, most of our expenditures for professional development centre around tactical skills development. For instance, sending a team member to an AFP or CASE conference. What we haven't been providing or encouraging is training or exploration in other areas. While I know this is important, I don't know where to look for this.
- Rather than investing in one-off conferences and courses, we've invested in a common curriculum of learning. We bring people in to speak and work with the full team, and in some cases, also with our Board and volunteers. This allows us to eliminate travel costs associated with conferences, and we invest those savings into the training budget.

- Conferences are important for developing networks and providing informal learning opportunities. We ask each person who attends a conference or seminar to present their learnings back to the team upon their return.
- Our organization has invested in professional coaching for our leadership team. Retention and succession planning is important to us, and we believe this will contribute to those goals.
- We've had a few individuals on our team participate in a regional Leadership program. The cost is modest, and we share this with the employees. There is a significant time commitment, of course, so that must be accounted for as well.
- We have paid for a people to take continuing education courses and seminars at our local college or university.
- I tell people not to let our organizational budget stand in the way of their own growth and development. They are worth investing in, even if we can't afford to do so to the degree they (and I) would like us to.
- Since so many non-profits operate so leanly, the impact of even a small mistake can be overwhelming to the organization. Thus, we tend to be highly risk averse. But people learn and grow from trying new things, and this includes making and learning from mistakes. It's essential that we create a safe environment for this in our organization.
- Unfortunately, when times are tough the first thing our Board cuts is the professional development budget. Consequently, we've learned to be creative and innovative in finding ways to encourage and foster growth without spending money.

In thinking about their own formative experiences, participants are applying their learnings in their following ways to nurture leadership development on your own teams:

- When I see someone with potential, I let them know it. I also invest time and energy into cultivating their knowledge, abilities, and thinking.
- Actively encouraging, praising, and celebrating even small successes is essential to building confidence and trust. It also models positive leadership behaviour, I believe.
- I take time every year to ask my direct reports what they want from their careers, and I can support them in attaining this. We also speak honestly about their strengths and limitations. This is something we talk about regularly, not just at a performance review.
- I hire for values and potential because knowledge can be acquired and technical skills can be learned. Some of the best people come into their roles with little experience. We invest time into these people, we encourage them, and we give them enough autonomy to grow and develop ownership and commitment.
- We have been cross-training our colleagues to ensure they gain a breadth of exposure to the various elements – and careers – in our organization.
- While we don't have the budget to support higher education or courses, I will contribute time and modify work schedules/situations to allow people time to pursue these.
- I make a point of having a 30 – 60 minute meeting with every staff member in our Foundation each year. This is part of focusing on big-picture succession planning at all levels. I want to know who our people are, what drives and inspires them, and how they might continue to contribute to our team in the future.
- At the beginning of each year I hold a retreat with our team where we plan together our goals for the year. The team helps to determine what we collectively will focus on for professional development, in addition to their individual growth and development goals. I find that by involving the team it builds buy-in and fosters an atmosphere of joint accountability. And by having common PD goals and activities, it gets all of us on the same playing field to tackle opportunities and challenges together.

- We actually invite all of our staff to our Foundation Board meetings, as observers. This works for us because we are a small team, of course. This allows them to see how I and our senior team members interact with the Board, and it also allows me to debrief afterwards to help them understand and make sense of what they saw and heard. Where appropriate, I also asked staff to make presentations. And the Board members can see that we have a team of committed, hard-working, intelligent people in our Foundation.
- At our organization, we ask Board members with specific expertise to help specific staff grow in those areas. For instance, this might be business planning, human resource management, or financial reporting. Sometimes this is done in the form of mentoring relationships, other times the board members may invite the staff to visit and learn from corporate colleagues and employees.
- We encourage voluntarism in leadership roles in other organizations in our community, and provide time off for these pursuits.
- There are a lot of things we do that don't cost much, if anything. For instance, each member of our team is responsible for bringing an article or book to share with others. We discuss our learnings and talk about how we can apply these to our organization.
- Each year our leadership team agrees on several management books that we all read and discuss. This isn't just our senior team, but in fact all employees are encouraged to participate if they wish. People can buy their own books or use the library.
- I asked our board members to share information about leadership development programs at their own employers or corporations. I also asked them to explore and share the costs of these programs. Not only does this give us some ideas, it has helped us to gain the Boards commitment (including funding) to professional and leadership development for our Foundation's team. In a few cases, we have actually been able to participate in elements of the corporate programs, such as attending workshops and speaker series, or borrowing/adapting programs and materials.
- We ensure that our employees have opportunities to connect directly to the mission of the organization. For us, it means that every employee serves on a community council, and this allows them to see direct the positive impact of the work they do. In this way, even someone who may only enter data can understand the importance and impact of their role on the people we help and serve.
- We draw on the resources of the hospital, because they are much bigger and have a much more sophisticated professional and leadership development program. This is cost effective for us, and also helps to forge closer ties with the hospital.
- Our university HR department has terrific programs, seminars, and workshops that are offered free or at low cost. We encourage individuals and teams to take advantage of these. We have, in a few instances, also had our HR colleagues prepare and deliver specialized programs for our teams.
- While encouragement is important, I also like to see who takes the initiative themselves to learn, grow, and seek out new information and experiences. This says something to me about their leadership potential.
- Any time someone in a management position is away for one week or more, we formally appoint someone in the "acting" role. We rotate the acting assignments amongst the direct reports to give people a chance to gain experience, and also to ensure perceived equity. As well, sometimes the people you think will shine don't, while others surprise you. (There are, of course, clear parameters to these short-term "acting" roles.)
- We have good relationships with a few other similar organizations, so we encourage "visitations" or "exchanges" amongst our staff. It's a great way to learn from others and to gain perspective.
- As a small shop, we realize that someone in the coordinator or officer role will likely never gain all of the skills and experiences here that will allow direct transition to the Executive Director role. Consequently, we encourage people to move on to great new challenges when they are ready. And we keep in close

touch, as one might with alumni, to ensure that they remain close to our organization. One day it is likely that one of these “staff alumni” will return to take over for me.