

Summary Evaluation of Bay Area ED Retreat

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Forty-two executive directors of Northern California non-profit organizations came together from October 22-24, 2002 for The Management Center's Executive Director (ED) Retreat, a unique opportunity for ED's to discuss and build their skills in fundraising, board development, human resource management and strategic planning, as well as to renew commitment and refine crucial leadership and management skills. A diverse group of ED's shared their successes, challenges and insights into how to run an effective nonprofit organization.

THE RETREAT'S EXPERIENTIAL METHODOLOGY

Retreat facilitator Tony Silard, a leadership development consultant specializing in experiential leadership workshops for non-profit executives, provided oversight of the conference design and implementation, with particular attention to applying an experiential, participatory methodology to every workshop. Tony's philosophy of empowerment and facilitation is the following:

'In any decision-making process, it's the person or people who participate in making the decision who gain power from the process. For participants to get anything at all out of a workshop, they should be sharing their own expertise, making decisions with respect to what they want to learn, and engaging each other in dialogue and other interactive exercises around issues that they consider to be important. This is particularly important in the case of leaders, who don't like to be led.'

Tony applied an experiential methodology to the ED Retreat as follows:

- In a pre-conference questionnaire, the 42 **ED's selected** the **skill areas** they wanted to work on at the ED Retreat, which were covered in skills workshops facilitated by Management Center consultants Matt O'Grady (Strategic Planning), Susan Fox (Fundraising), Bailee Serbin (Human Resource Management) and Leyna Bernstein (Board Development).
- For each of the four skills workshops, four or five ED's participated on a **panel** based on their self-reported Strength Areas. Each ED spoke for approximately five minutes about their Best Practices and 'the secrets of their success'. ED's shared their expertise and then engaged in a dialogue with each other in order to distill Best Practices that they could take back to their non-profits after the conference.
- Each ED worked through specific organizational challenges during one-hour **Breakout Sessions** where 3-4 other ED's and a consultant helped them develop new strategies to move their organization forward.
- Retreat facilitator Tony Silard facilitated **interactive leadership workshops** on the characteristics of effective non-profit leaders, vision-alignment (aligning an organization's core values with its practices), and balancing work and life. All skills and leaderships workshops were participatory and included experiential, interactive exercises including presentations, dialogue, Q&A, 1-on-1 interviews and group projects.
- The ED's engaged in a candid two-hour discussion with a **Funder Panel** of 5 Program Officers from the Goldman Fund, the Lucille Packard Foundation for Children's Health, the Santa Cruz Community Foundation, the Monterey Community Foundation and an individual donor about Best and Worst Practices in fundraising. The funders shared what they respond well to and what turns them off when approached by ED's seeking funding.
- Each ED was paired with a **Co-Mentor** to meet with after the retreat based on complementary Strength and Challenge Areas.

- Each ED had the opportunity to customize two hours per month of **organizational development support/executive coaching** with a Management Center consultant, based on their organizational needs (at no charge) for the three months following the retreat.

FEEDBACK FROM THE POST-CONFERENCE EVALUATION

A two-page evaluation form was distributed on the last day of the conference. The ED's spent approximately 30 minutes responding to the questions. Below is a summary of their responses:

Facilitator

The ED's offered praise for Tony's facilitation:

Janna Genovese, ED of Womenspace Unlimited wrote, *"I believe that many of us learned a lot more than we anticipated we would. Tony's workshops fueled conversations that continued through dinners, evening walks on the beach, and late night groups who gathered around wine and intense conversation. We learned new information to take back home, information that will strengthen our organizations and ourselves as the leaders of those organizations. I believe that there was tremendous energy produced by so many intense and passionate people coming together in such a beautiful location... Tony helped us regain our focus and renew our passion and vision!"*

Another ED commented that, *"I need more time for myself, I need to find balance and hone skills for my staff. I can learn a lot from Tony's calmness and integrity."*

James Reber, ED of Young Audiences of San Jose & Silicon Valley, wrote, *"I want to attend annually – Tony is great."*

Suzanne McKechnie Klahr, ED of YouthBuild commented, *"Tony was the perfect facilitator as he had walked the path I am on."*

Robin Holcomb, ED of Family Connections, commented, *"The ED Retreat certainly hit the spot. Tony did a great job of facilitating the event, and bringing people together."*

Philosophy of Leadership

The ED's were asked **'Has the ED Retreat impacted your philosophy of leadership?'** Responses included:

- *"Yes, reinforced some sense of my ability to be a leader and gave me opportunities and tools to look at areas where I am lacking."*
- *"Yes. Think about the important long range issues – everything else will fall into place."*
- *"I feel more of a 'team player' as opposed to a 'one person show (it can be hard in small organizations with isolation)."*
- *"It reinforced the importance of delegating and letting staff work to meet the goals"*
- *"I like the concept of leader or guide for the roadmap of the mission."*
- *"I need to learn to be a better partner with the Board President."*
- *"I came with one main issue I wanted to work on – balance/time management. I realize that many other ED's struggle with this same issue. I got validation and permission (underline theirs) from my peers to make changes, ask for help and set boundaries."*
- *"Has reinforced some things, especially the importance of delegation, focusing on the big picture and long range planning."*
- *"I will try having a different program staff run the staff meetings, not just me all the time."*

ED Tenure

Increasing **ED tenure** was one of the most significant goals of the ED Retreat. According to a recent study of 150 Bay Area ED's by CompassPoint, the average tenure of an ED in the Bay Area is 4 years and 87% say they will never do it again. Participants were asked **'Has the ED Retreat affected your outlook on how long you see yourself continuing as an ED?'** Responses included:

- *"I was sure I would quit by June 30, 2003. I can see myself staying longer. I trust my instincts and self more now."*
- *"Yes. I now want to be an ED indefinitely into the future."*
- *"It has reinforced that I'm in it for the long haul."*
- *"It helps to see people with continued passion and empathy years into the work."*
- *"Yes. I really need to find more balance in work and I really am enjoying what I am doing."*
- *"Yes – made me more interested in staying involved with human services work."*
- *"Yes, it is important to hear what others are experiencing/learning and to reflect on the similarities and differences."*

Lessons Learned

Participants were asked, **'Please write down the most important lessons about non-profit leadership you feel you have learned from the ED Retreat.'** Responses included:

Balance:

- *"Stay balanced"; "Balance stress"; "Balance work"; "Balance, perspective"*
- *"Continue to strive to be a better, well-rounded leader"; "Take care of yourself."*
- *"It addressed my current issue of time management."*

Leadership Characteristics:

- *"Trust."; "Be empathic and trusting."*
- *"Listen!"; "Listen more than talking."*
- *"Good reminders about patience and understanding with staff."*
- *"Try to walk around and talk to staff 1/2 hour every day."*
- *"Leadership is a constant learning opportunity."*
- *"ED sets tone for staff, Board and agency."; "Innovate."*

Skills Areas:

- *"New organizational chart form."; "HR ideas."*
- *"Role of ED in taking strategic plan to operational plan."*
- *"Importance of ED/Board President relationship."*
- *"How important evaluation of programs, goal setting and evaluation, and measuring success really is."*
- *"Board development—the ED must take a strong role."; "Ongoing work of Board development."; "Importance of sustainability and the boards role in it."*
- *"Ask major donors for 3 more names."*
- *"Strategic planning made easy with 1 day every year."*

Peer Networks:

- *"There is a wealth of knowledge in colleagues."*
- *"Great to be connected with other EDs."*

ED Favorites

The ED's responded to the question, **'What were your favorite things about the ED Retreat?'** as follows:

Leadership/Balance Workshops:

- *“Balance session was great!” (repeated numerous times)*
- *“I most enjoyed the leadership and balance workshops – they were wonderful!”*
- *“Topics about balance and leadership” (repeated numerous times)*

Breakout Sessions:

- *“I loved the breakout sessions because it was so wonderful to have the full attention and focus of 3-4 others to offer help in working on my issues.”*
- *“Enjoyed breakout sessions” (repeated numerous times)*
- *“Especially liked breakout sessions ... “particularly as they were with like organizations so you didn’t have to explain industry jargon.”*
- *“Breakout sessions were fabulous”*
- *“Breakout sessions/problem-solving”; “Small group discussions”*

Peer Networking:

- *“Being around seasoned professionals and young upstarts with new perspectives and strategies for problem solving.”*
- *“I really enjoyed the interaction with others and honesty and trust to speak about real issues.”*
- *“Time spent sharing with other ED’s”; “People, colleagues, informality and openness”*
- *“Meeting colleagues and peers”; “The networking during breaks”*
- *“Meeting and hearing from a variety of EDs in many different fields.”*
- *“Just getting a chance to meet other people who have the same worries/issues I do.”*

Experiential Methodology/Panel Format:

- *“I liked the approach of engaging participants on panels—learning from one another.”*
- *“Panels with short presentations and time for interaction—just the right amount of time given the size of the group”*
- *“Panel format, dialogue with other EDs and TMC staff”*
- *“Funders panel”; “I loved the workshop/retreat!”*

Improvements for Future ED Retreats/Conferences

ED’s were asked, **‘What did you feel most needs to be improved about the ED Retreat?’**

Based on their responses (italicized below), future ED Retreats in the U.S. will include:

1. More unstructured time:

- *“I agree that more break time is essential. I also got a lot out of our group breakout sessions and meals together. Many of us met in the evenings in the lobby/fireplace area of our building to discuss fundraising triumphs and failures and just about everything else pertaining to leadership of our organizations. I think those informal gatherings were very useful.”*
- *“More free time. ED’s will structure themselves to get what they need.”*
- *“More time per topic – which might mean less topics.”*
- *“The schedule was too full and content too extensive for the time frame. Either edit content or expand timeframe.”*
- *“Less structure.”; “More unscheduled time.”; “More personal time.”*
- *“More information and less breaks for me.”*

2. Case studies:

- *“Why not use some case studies in a formal manner to address certain situations (e.g. HR, funding emergencies)?”*
- *“Using a case study to review a specific point on leadership, board issues, etc.,”*
- *“Using case-studies as a means of problem-solving.”*

3. More varieties in format:

- *“Consider clustering like sized organizations together for more discussion/activity.”*

- *“Add a few short physical activities to ‘wake people up’.”*
- *“Exercises, small groups. I can’t be productive and sit in a chair 6-8 hours a day.”*
- *“Just because there are so many differences, maybe some break-outs for ED’s of [different types of] agencies.”*
- *“Keep the small break out sessions.”*

4. Other:

- *“I would like to see a retreat on non-profit EDs as a profession! Also would like to see a retreat in Central Valley....There are so many EDs who need this assistance and support.”*
- *“Extra day and more handouts and materials”*
- *“I would love to see it end on a Friday so you can have the weekend to reflect on the experience rather than jump right back into work the next day.”*
- *“Have breakout groups meet with each consultant to address problems related to fundraising, HR, strategic planning, etc. Not sure how to structure it because presentations are helpful first.”*
- *“Allow participants to self-select into groups based on interests.”*
- *“Do a little more ‘getting to know the other EDs’”*

FOLLOW-UP QUESTIONNAIRE: 6 MONTHS POST-RETREAT

Six months after the retreat, participants were contacted to evaluate how they were applying the skills they learned at the ED Retreat in practice.

Lessons Learned

In the Follow-Up Questionnaire, ED’s were asked **‘What are the most important lessons you took away from the ED Retreat?’** Responses included:

Balance:

- *“The importance of setting aside thinking/planning time and that is’s ok to do this.”*
- *“Balance for longevity.”; “The importance of a work/life balance.”*
- *“The need to recharge.”; “Collegiality, humor and perspective.”*

Peer Networking:

- *“I feel less isolated and lonely, and I valued the exchange from peers, particularly from the skill workshops and panel discussions.”*
- *“The need for mentors.”; “It is normal to feel lonely as a young ED.”*
- *“To remember to keep things in balance and find support from other ED’s. I was most inspired by the fact that regardless of what problems someone was discussing, whenever any ED talked about the mission of his or her organization, you can see his/her passion about it.”*
- *“Experienced colleagues are the most important resource for practical problem solving.”*

Leadership:

- *“Leadership ideas.”; “New definitions of leadership.”*
- *“Hire for mission, train for skills.”; “Change is the only thing that is guaranteed.”*
- *“I believe that the ED Retreat allowed me to get back in touch with some important concepts that I had long forgotten. I made new friends and expanded my own horizons. Through that I have been able to view my work differently and inspire others to keep moving when they feel overwhelmed. I have a vision for the future of our organization and with the Board and Staff I believe that we will get there. I feel a renewed sense of pride in where we have been and where we are going.”*

ED's Putting Into Practice Specific Strategies Learned at the ED Retreat

ED's responses to the question, 'Are there any specific strategies from the ED Retreat that you still put into practice?' included:

Balance:

- *"It definitely helped to rejuvenate me. I've tried to keep that feeling with me as much as possible but it's hard to always do that."*
- *"Personal strategies I still practice include taking care of myself and enjoying life. I 'Don't Sweat the Small Stuff', I continue to stop and breathe, take long walks almost every day, and make time for my family and friends. I feel that my personal outlook on life is reflected in the work I do everyday."*

Empathic Listening:

- *"I still sometimes struggle with being able to actually 'listen' and remain in the present but at least when I'm not listening, I'm usually aware of it."*

'Management by Walking Around':

- *"I spend a lot more time now walking around our offices talking with staff and clients. At first, staff was a little "intimidated" and would stop talking to each other when I approached but fortunately that was short-lived. I've learned so much from them in the last six months!"*
- *"Make rounds and talk to everyone on staff as regularly as possible."*

Other:

- *"Seeing the Board, Org and Me as parts of an organizational wheel...I am definitely more comfortable asking for help than I was."*
- *"I modeled a one-day strategic planning session after one described by an ED at the retreat."*
- *"I believe that the personal and professional strategies I am still practicing are ones that I used in the early days of our organization but had long forgotten."*

Philosophy of Leadership

ED's responded to the question, 'Are there any specific lessons from the leadership and balance sessions that have influenced your current philosophy of leadership?' as follows:

Balance:

- *"We (leaders included) all need to have balance in our lives. I'm slowly beginning to realize the magnitude of this simple, yet very important statement."*
- *"I had no work/life balance."; "I am working to be a more peaceful person (damn, it's hard)."*
- *"I would have to say that the "Success vs. Happiness" concept was an important one for me. When I came to our organization it had four staff, a \$100k budget, and was housed in the old ranger barracks. In seventeen years our budget has increased twelve fold, we now have twenty-four staff, serve two counties, and own our 6,000 square foot office building, two emergency shelter houses, and our transitional housing facilities. Last year we provided services to over 3,000 women and children. I consider our organization very successful! However, the emotional price for me was that I had become too busy to stop, breathe, and enjoy the success of our vision. Although my workload has not lessened since the retreat, I have consciously relaxed and smiled a whole lot more! I have in turn asked my staff and Board to do the same. Our passion is the same, we just express it differently."*

Other:

- *"It was a good refresher to try to keep things in perspective. I really enjoyed hearing the stories of other ED's."*
- *"I am less afraid of making mistakes."; "I am more accepting of admitting when I am wrong."*
- *"The idea of relationship-building and maintenance."*

Co-Mentor

Reports on Co-Mentor meetings are mixed. **63% of ED's surveyed have independently made contact with their assigned Co-Mentor after the ED Retreat.**

ED responses to the questions, **'Do you meet with your Co-Mentor? How many times have you met since the retreat?'** included the following:

- *"Yes – 3 times.";* *"We do meet – I think two or three times so far."*
- *"I have not met with my co-mentor. Although we initially talked about it, we never really got around to doing it. It's my fault – I should have made a greater attempt, regardless of our heavy work schedules.";* *"No. We've tried a couple of times, but failed."*
- *"I am sorry to say that I have not met with my Co-mentor but I have kept in touch with him through email.";* *"We exchanged a few emails, but it was not a great match."*
- *"We have had a few meetings since the retreat, mostly to share information."*

Post-Retreat Peer Support

Apart from meeting with their Co-Mentors, **75% of ED's surveyed have met since the ED Retreat with other retreat participants for peer support.**

ED's responded to the questions, **'How many ED's whom you met at the ED Retreat do you still stay in touch with? Has this made a difference in your work? How?'** as follows:

- *"Two or three and it has made a difference as I have a deeper support network and a place to turn; I think I am becoming a better manager, as I am able to bounce ideas off others who have 'been there and done that.'"*
- *"I have stayed in touch with eight of the Executive Directors. The members of my "Breakout Session" group have been trying to schedule a 'reunion' for the last three months and we are still emailing on possible dates and places."*
- *"[One ED] has helped me with developing a more systematic approach for my mass mailing campaign."*
- *"I've contacted one ED to get more specific info about her strategic planning session format."*
- *"Unfortunately, only my mentor, although I met so many great people at the Retreat. I think there just isn't enough time in the day for any of us. Another ED was going to join us but scheduling and distance makes it challenging."*
- *"For myself, after the retreat, I felt rejuvenated, and renewed. I met many terrific people at the retreat. I'd hoped to keep in contact with a few. I'm sorry to say that I haven't stayed in touch with other EDs. I'm sure that would have made a difference in my work."*
- *"My contact with other ED's has been invaluable to me. It has made a professional and personal difference in my work. When I went to the ED Retreat I was feeling mild burnout after sixteen years as the ED of our organization. I was feeling quite isolated and unsure if I wanted to continue on or move in a new direction. I was totally rejuvenated by my 'Asilomar Experience' and have not only been able to regain my passion and vision but have been able to reach out to some of the new ED's in my area and have been mentoring them. I received a wonderful card, last month, from one of them thanking me for my 'honesty, support, and friendship'."*

Conclusion

It is clear from the above feedback that the ED Retreat has made a significant impact by providing a forum for ED's to share ideas around leadership, distill Best Practices in the crucial skill areas for running an effective non-profit, and access an invaluable peer support network. Continuing these ED Retreats and expanding them to new locations is very important, as there are so many committed ED's who have never had the opportunity to attend such a workshop where they can refine their skills, renew their vision and return to their organizations energized and able to sustain their social commitment. As an indication of the strong demand for the ED Retreat, **75% of the ED's who completed the 6-month follow-up survey said they would attend a second ED Retreat.** Based on the feedback in this evaluation, the benefits to non-profit ED's will be enhanced and expanded upon in future leadership conferences.