

The InVision Executive Circle:

How two days of fresh food, breathtaking spaces, trusted colleagues and soul-shifting conversations transform leaders and their organizations.

THERE IS A REASON FOR EVERYTHING that is done. Who is invited. Where we meet. When we meet. How we work. What we accomplish. Each element contributes to the group's purpose in coming together.



The drive is the beginning. Exiting the highway from Washington DC they wind their way from concrete buildings and urban congestion to the rolling hills and open pastures of Fauquier County, Virginia. Traversing past cows and horses, hawks are soaring in the distance and the stress of work and city living begins to lift just as the fog lying on the fields does the same. Their destination is Poplar Springs Manor. This beautiful estate is located on 173 acres just outside the Town of Warrenton. Constructed in the 1920s using fieldstone from the property and resembling 17th century European architecture, this historic hotel is where they are meeting for February's Executive Circle retreat. Taking place over two days, the group engages in learning experiences that create professional and personal growth. Gathering for their meetings in the antiques furnished sitting room, sleeping in rooms with fireplaces, eating farm fresh food, and walking the peaceful trails throughout the estate provide the restorative foundation for the learning they are here to do.

The participants at this retreat are Executive Directors of nonprofits; some in the arts, some focused on homelessness, hunger, health,

education, or youth. Coming together in this Executive Circle they are here to learn, to improve, and, most importantly, to support each other in facing the demands placed on them as the leaders of their organizations. This Executive Circle has existed for seven years and continues to provide its members with the growth and community they seek.

Our strategy is successful because we focus on five

key elements: The Power of Community; The Power of Place; The Power of the Circle; The Power of Change; and the Power of Support.

THE POWER OF COMMUNITY

Working with the right people can create amazing results. Benjamin Franklin understood this when he formed the Junto; a club of twelve young men from assorted occupations all with an interest in helping each other in their personal and professional pursuits. In selecting each member, he sought men with a strong desire for self-improvement and willingness to initiate new projects that would help others. Formed in 1727, the group met on Friday evenings in a home to discuss issues of business, politics, morals, and philosophy. Lasting 38 years, the club created a number of important public projects including the Pennsylvania Hospital, the University of Pennsylvania, the Union Fire Company, the first lending library, and volunteer militia.

As Franklin clearly recognized, choosing the right members is essential to a group's success. Our Executive Circle participants come from nonprofit organizations in the Washington

DC metropolitan area. They are peers, overseeing organizations with budgets between \$2.5 mil and \$90 mil and are interested in improving their leadership, interpersonal and board relationships, and strategic visioning skills, as well as addressing the social and political challenges facing their organizations. While in different sectors, they share many of the same problems and are driven by a common passion to serve their patrons, clients, students, or members. Henry Berman, CEO Exponent Philanthropy, said for him the group has been "an oasis where I can get together with really smart people who understand the nature of the nonprofit world, but not necessarily the mechanics of my world. We talk about larger issues we face and I can get out of the weeds."

In addition to members having similar challenges and goals, participants must be willing to follow the group's rules of engage-

In putting together our Executive Circles we seek participants who:

Are diverse in gender, age, race, sexual preference



Must be the top Executive (CEO/ED or President)



Share common problems or issues



Have a shared passion or goal; mission-driven organizations



Have a strong desire to learn and implement change



Are willing to be open and vulnerable



Be open to feedback



Honor confidentiality and are willing to listen and authentically share both expertise and struggles

ment. Confidentiality and a willingness to be vulnerable and share not only your expertise, but also your struggles is required. “Everybody respects each other and the need for confidentiality,” says Shannon Steene, Carpenter’s Shelter Executive Director. “You can reveal your underbelly and be vulnerable so that you can flesh out the issue and get help. The longer we are together, the bigger and more difficult the issues are that we discuss.”

THE POWER OF PLACE

Location is important. The setting itself establishes a mood and a mindset.

Walk into any office meeting room and what do you see? Neutral wall-to-wall carpeting. Long wood or laminate conference table. Ergonomic desk chairs. White Board and maybe some unmemorable art on the walls. The space feels formal, rigid, and restrained. Hotel meeting rooms are similar; maybe they have a bit more color in the rugs, but essentially exclude the same vibe. These spaces are designed for presentations and highly structured meetings. The form fits the function.

Executive Circle gatherings are held in Country Inn’s, Manor Houses, or Lodges. Unlike large hotels and conference centers, these venues tend to be smaller, provide exceptional dining options, and overall offer a more aesthetically pleasing experience. Rather than meeting rooms, these establishments have sitting rooms that are more like the family room in your home. Filled with big sofas, roomy upholstered chairs, antique tables and rugs, and rich fabric draperies, the spaces feel welcoming, warm, and comfortable. These facilities support a mood and mindset that are more open, flexible, and relaxed.

Circle members meet at these locations three times a year for a two day retreat. Executive Directors have packed calendars filled with stressful days. Time is a precious commodity. The meetings are not so frequent that they become burdensome, but enough so the group maintains the continuity of what they are learning as well as their connection to each other. “Having three times a year that is dedicated to thought time with my peers is really fulfilling,” says Strathmore President Monica Jeffries Hazangeles. Doing the work over two days allows members to disengage from work and completely focus on the topics



In choosing the location of our gatherings, we make sure the space nourishes body, mind, and spirit.

being discussed during the day and enjoy each others company in the evening. “Getting in my car and driving for an hour forces me to disconnect. I have to be fully present in order to participate and that is a great relief,” says Dodd White, Episcopal Center For Children President.

THE POWER OF THE CIRCLE

The physical space of the locations we choose are not the only structures that need to be considered for our gatherings. How we organize ourselves in the meeting also effects what we learn.

Whether it’s a classroom or professional seminar, most instructional environments are set up with a teacher, coach, or speaker standing at the front of the room lecturing to students sitting in rows. In addition to being an effective means of transferring facts and data it also elevates the teacher as the sole dispenser of information and knowledge.

While Executive Circle members do spend some time learning information that is fact and data focused, most of what is learned in the group is what Gilbert Ryle calls “know-how” versus “know-that.” Sometimes referred to as tacit knowledge, it involves learning a complex skill that is not easily described in just words. Like driving a car, playing an instrument, or, in this instance, leading others, it is a skill that is developed not only by understanding concepts, but also through observation and practice, and as such, requires a different mechanism to convey information.

As a shape, the circle is an inclusive arrange-

ment that serves tacit learning well. When we sit in a circle hierarchy is eliminated. Members participate as both teachers and students. It allows every person to contribute their knowledge and experience and for all to more fully engage in the learning process. Debbie Shore, Executive Director and Founder of Sasha Bruce, says the magic sauce is in the wisdom of the group. “Coming together to talk about various problems facing our organizations causes us to think out of the box. It gives me the energy for creative solutions that are sensible.”

In taking an active role in the learning process, members suggest topics that provoke discussion and explore solutions to problems they face. The facilitator brings materials and activities that support this exploration as well as providing instruction to strengthen participant’s leadership skills. N Street Village CEO, Schroeder Stribling, has said it is energizing being in the group. “Heather is responsive to our input and suggestions. She gives us a prompt to react to and lets the group take it where it goes. The group can dive deep and she trusts us to do that.”

In addition to the discussions that take place in the large group, participants also meet in smaller breakout groups to talk about individual challenges and problems. Members are also paired for one on one discussion’s where more detailed conversations and deeper connections can take place. Flexibility in managing the meeting’s agenda is also necessary. “I have been in enough facilitated sessions that are just so structured. Heather has the sense to feel our collective pulse and roll with it to

make the most of what we are doing,” says Henry Berman.

THE POWER OF CHANGE

In his presentation, “The Future of Knowledge Sharing,” researcher and co-chair of Deloitte Center for Edge Innovation, John Seely Brown, says our best practices and skills have a much shorter shelf life because of this era’s rapid and continuous pace of change.

The key to keeping up is not to get stuck in what you think you know and have a willingness to embrace new ideas and ways of doing things. In order to see new solutions and take appropriate actions, Brown says you have to “unlearn” certain habits and beliefs.

Many of the topics we discuss in Executive Circle focus on bringing unhelpful, and often, unconscious habits and beliefs to our awareness so that they can be examined, understood, and replaced with more beneficial responses. In one session, the group read Tammy Lally’s book, *Money Detox*. In looking at underlying beliefs and feelings about money, we examined how those beliefs effected the way members managed their organizations’ budgets. Paul Public Charter School CEO, Dr. Tracy Wright, said the book and group work gave her tremendous insight into what

was driving underlying decisions in how she managed the school’s money. “Money was not managed well when I was growing up. So as an adult, I always want to make sure I’m not caught off guard and whatever last minute needs come up there are funds to meet them. My fear of not meeting obligations though caused me to have more reserves than we needed. Instead of sitting there, the money could be used for things that were really needed, like teacher training or supplies. I still am very careful about where and how the funds are spent, but without the fear I am now better able to maximize the money we have.”

In other sessions the group focused on expanding their emotional intelligence skills. Defined as the capacity to be aware of, control, and express ones emotions, and to handle interpersonal relationships judiciously and empathetically, emotional intelligence as a factor for success has been validated through extensive research. In his book, “Emotional Intelligence,” Daniel Goleman writes that emotional intelligence abilities “rather than IQ or technical skills emerge as the ‘discrimi-



nating’ competency that best predicts who among a group of very smart people will lead most ably.” Nikki Highsmith Vernick, The Horizon Foundation CEO says, “I’ve always been very good at social awareness, seeing and feeling what others need and responding to that, but what I’ve learned is I also need to pay attention to what’s going on inside me and how I may be projecting that.”

While topics evolve over time according to the groups needs, the underlying objective for the group is to continue to change and grow so that they are as effective as they can be for themselves, and the populations and organizations they serve.

THE POWER OF SUPPORT

It’s lonely at the top. It’s an adage we all know well and remains as true today as it has been throughout history. According to the Harvard Business Review, 61% of leaders believe loneliness hampers their job performance. Isolated as the final decision makers, CEOs have to answer to their boards, employees, and their stakeholders with no one to talk to about their concerns or to help them problem solve.

While isolation affects all leaders, non-profit executives have particular challenges in addressing their needs for support. In a 2017 BoardSource study of 1,759 nonprofit chief executives, 67% of CEOs who report that the board had a negative impact on organizational performance, also reported that they do a poor job of providing guidance and support to them as the executive. This lack of support, in conjunction with increasing demands on leaders to maintain funding, deal with the impacts of political instability, increasing client needs, and management of a more

This is WHAT happens when we get together:

In general—participants experience many forms of connection—large group, smaller groups, one-on-one, take contemplative walks to discuss a poem or story relating to the topic, connect in groups of two to four for deep discussion, case studies—support actual challenges.

Day 1

Check in—each person shares issues since last gathering and gives an update on their BHAG (Big Hairy Audacious Goal).

Lunch, walk-discuss question relating to prework that are pertinent to leadership in general and how it impacts them.

Afternoon-time to chosen topic until lunch on day two. Pull the topic apart in groups of twos and threes. Shoot for a maximum mixture of participants so that everyone talks with everyone else.

Day 2

Continue topic discussions from prior day. In the last two hours they meet in groups of four—30 minutes each to share what is weighing heavily on their minds—personal or professional. They ask for specific help. Group asks probing questions and shares their experience, strength and hope—giving advice is highly discouraged.

Final hour-review how the session went, express gratitude, discuss and choose topic for next session.

The work includes somatic/body movement/physical exercises to support learning. Learn new body technics such as “the grab.” A physical reaction to a startling experience—as if something just grabbed you. Learn how to shift to come back to center before responding. Discuss more with Heather for examples.

complex workforce, creates a perfect storm for higher rates of executive burnout and turnover.

In order to serve the causes and people they feel so passionately about effectively, nonprofit leaders must devote time to their own development and self-care. In “Daring to Lead 2011,” a joint project of CompassPoint Nonprofit Services and the Meyer Foundation, researchers noted, “Peer networks, both formal and informal, were especially effective for decreasing feelings of isolation and norming the trials and tribulations of the role (of the executive).”



IN LEADING EXECUTIVE CIRCLE groups over the past seven years it has become evident that this method of learning and support has been instrumental in helping leaders thrive in their roles. In asking participants of Executive Circle why the retreats have been so helpful to them as leaders, they have said:

“I’ve brought specific problems to talk about in the group. It has helped me listen to my intuition and I’ve gained more confidence as a leader. What I value most is that these types of groups provide incubator spaces that will help us get to those innovative and bold solutions.”

SCHROEDER STRIBLING
N Street Village

“Part of Executive Circle’s role has been to equip me to deal with the challenges I face. I carry myself in a different manner because of the training and what I’ve gotten from the group.”

SHANNON STEENE
Carpenter’s Shelter

“The other people in the group are interesting and accomplished and I learn a lot from them. What’s most important is that you can say whatever you need to say. Things you can’t say to staff, or the board. The people in the group understand immediately. They get what you’re facing.”

SUZANNE LAPORTE
Compass DC

“I was hungry for other leaders in my situation. It’s great having people from different size organizations. Seeing people with bigger budgets agonizing over the same issues as me. Makes me realize I’m not the only one and the challenges can be the same whether you’re big or small.”

JACKIE DECARLO
Manna Food Center

“This is a safe space where you can slow down and think... You need to find time when you’re not in reactive mode and can take a break to see what you’re doing and how’s it’s working.”

DON BLANCHON
Whitman Walker Health

“I’m in a job that is very insular. There is a great benefit being with trusted people who can look with fresh eyes and might have good advice.”

LAURA MEYERS
Planned Parenthood of
Metropolitan Washington

“To be with people who are living... similar challenges and support and help you is priceless. Even just offering understanding is so helpful.”

DR. TRACY WRIGHT
Paul Public Charter School

“The power of the changes I have experienced has changed the way I use the power that I hold.”

HENRY BERMAN
Exponent Philanthropy

As peers, colleagues, and, over time, friends, these individuals have joined together to learn new skills, share their knowledge, and encourage each other’s growth. Having the right people, in the right place, in the right way, continues to make Executive Circle a comprehensive learning experience that provide leaders with the support they need and rightly deserve.

Topics Have Included:

- Spent one year on Mastering Leadership by Robert Anderson
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- Blindspot: Hidden Biases of Good People, by Greenwald and Martin— Diversity and Inclusion
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- Blindspot by Mahzarin R. Banaji and Anthony G. Greenwald
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- Individual strategic plans
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- Leading through major transitions
-
- Sparking creativity and innovation
-
- Trust and influence
-
- Conflict
-
- Coaching skills
-
- Presentation skills
-
- Breaks in transparency—breakdowns and breakthroughs
-
- Accountability and performance
-
- Difficult conversations
-
- Each participants is asked to identify their BHAG— Big Harry Audacious Goal

Executive Circle for NONPROFIT LEADERS

To learn more about our Executive Circle programs and see how you too can experience deep connections with other trendsetting leaders contact: heather@invisionllc.com or visit www.invisionllc.com or 202 450 1213.