

# A Group of Coaches

Why facilitated, peer coaching for executive directors represents an effective—and underused—form of professional development.

## The Case of CEOs Together After Five Years

By Laurence A. Pagnoni, MA, MPA

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**I**t is Tuesday morning and several nonprofit executive directors (EDs) sit around a conference table. Some of the group's nine members are just arriving, hanging up their coats, and discussing the cold weather that rolled in that week. Others have brought their breakfast with them. They drink coffee and bite into bagels as they catch up with one another.

But when one of the co-facilitators brings the meeting to order, the tone shifts, becoming at once more focused and intimate. Going around the table, the executives talk in turn about the organizational dilemmas each faced over the past month. One is having trouble with a program director who won't give straight answers about the progress of their client services. Another is having cash flow problems and needs to find a way of securing additional unrestricted funds.

Across the room, the executives nod in recognition when these difficulties are described. They're not satisfied, however, to let their peers vent frustrations. The facilitators probe for ever deeper descriptions and more telling details. Several executives share their experiences with similar problems.

The morning's most intense discussion occurs when the designated presenter describes a developing dysfunctional relationship with her board chair. "He won't set aside time to talk with me before board meetings about

how he's going to run things," she explains. "Often he doesn't even return my phone calls. I'm worried about being left out of the loop on governance decisions in my own organization."

As she finishes, an executive across the room jumps in. "Weren't you dealing with the same thing with this person a year and a half ago?" Silence fills the room.

Finally, a facilitator speaks. "We know this board member has an introspective personality," he says. "And that creates tension, given your leadership bias toward open conversations. And haven't you told us about your concerns with audit compliance?" The other facilitator prompts: "Do you see some fundamental differences between you and your board chair over organizational direction?"

In the ensuing discussion, one executive talks about her success in replacing a board chair with someone who was a better match for her planning needs. Another relates that by assigning his executive assistant to maintain steady contact with his board, he greatly improved communication. By meeting's end, the presenter had considered several perspectives, and the frustration that earlier had showed on her face was replaced by a calmer, more pensive expression. Now she talked about her options in managing the non-communicating board chair.

"These people see patterns in my behavior better than I see them myself," she said to the facilitator on her way out. "I'm relieved to have a plan of action."

## **A Case Study in Facilitated Group Coaching**

The scene above describes a typical meeting of CEOs Together, a professionally moderated group coaching initiative, which I co-facilitate. What participants take from the monthly meeting is in some respects similar to what they might receive from an individual executive coach. However, the combination of varied perspectives and experiences that are offered in the course of a meeting is one thing that makes group coaching unique, and makes exploration of the peer approach an interesting prospect for executives and management theorists alike.

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coaching—if they have heard of it at all. This is not surprising, since management literature has devoted little attention to the subject. Coaching has been well established in the for-profit world for more than twenty-five years. But it remains a rare phenomenon in the non-profit domain. Moreover, most nonprofit EDs think of coaching as a one-on-one relationship and have never considered the benefits of the group approach. Executive resistance to revealing their vulnerability before peers by openly discussing organizational weaknesses is common and may reinforce the bias toward the individual paradigm.

This is unfortunate. My academic research on CEO support and training, as well as my many years of work as a practitioner in the field and my five-year membership in a peer coaching group, have taught me that group coaching can be one of the most effective and cost-efficient means of professional development for nonprofit executives. The group model generates a feeling of relief and reduces stress among group participants. It also breaks patterns of behavior that inhibit effective management, provides technical assistance tailored to the executive role, and produces significant, sometimes even unexpected, results.

Now five years old, CEOs Together has produced important insights into this under-examined niche in the field of professional development. As a case study, it sheds light on some key questions: How did group coaching develop? What are the unique strengths and limitations of the group approach, compared with better-known one-on-one models? How does group coaching work for nonprofit executives on tight budgets and with little time to spare?

## **An Underused Approach in Professional Development**

My interest in professional development for nonprofit leaders emerged over sixteen years of service as an executive manager. In that time, I learned that many colleagues were unable to remain engaged in the work they loved because the demands of the work seemingly exceeded their personal capacity. Executive directors need on-going support; often they do not receive it in a way that makes a lasting impact. Even those who ask for and receive help are not always able to find ways to stay healthy in their jobs, avoid overwork, and remain effective and creative.

Research bears out my belief that executives must seek support structures that will allow them to move "beyond survival." Executive Coach Christine Brown points to a 1999 San Francisco-based study that found

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that only twenty percent of first-time executive directors wanted to be EDs in their next job. Preliminary reports from a Baruch College study show that “nearly half of New York’s nonprofit executive directors plan to leave their jobs in the next five years,” and that “fifty-seven percent lead organizations that don’t offer professional development programs for new leaders.”

While these reports are fairly new, rumblings of this emerging crisis have long been discernible. Not only have EDs anecdotally related the unique pressures of leading modern nonprofits, they also have bemoaned the shortcomings of the most common responses to their need for professional development—the weekend or weeklong management course. Many leaders judge these to be no more than “quick fixes,” too costly and too short on substance to make a lasting impact on their work. Traditional academic programs are also a limited option, as they typically are too lengthy and too expensive for most EDs to consider. Further, they offer no practical reflection on the day-to-day difficulties of the executive.

In the mid-1990s, searching for a real response to this dilemma, I began an academic study of competing programs for executive support and training. My completed study identified the methods employed by six leading programs. It then used interviews with both for-profit CEOs and nonprofit EDs to determine the effectiveness of established approaches. Ultimately, I forged my findings into the model for CEOs Together.

The institutions I examined included two organizations with proven histories of addressing the needs of business executives—The Executive Committee and the Harvard Executive Education Programs. Two other institutions—The Aspen Initiative and The William Alanson White Institute—focus on using interdisciplinary approaches to enhance the quality of leadership. Finally, I studied the Woodstock Business Conference and the Shalem Institute for Spiritual Formation, which combine reflection on the day-to-day problems of executives with an attempt to help people develop a deeper spiritual grounding for their work.

Several important principles emerged from analysis of these models: the value of forming groups of carefully screened executives, the need for skilled facilitation, the usefulness of occasional outside experts, and the importance of connecting technical assistance with guidance

that addresses executives’ deeper sense of spiritual or professional calling.

In talking with CEOs about their experiences with training programs, I heard them indicate time and again that the most practical support they received was from peer executives who had experienced problems similar to their own. They felt the really successful programs were the ones that created a structured, non-competitive environment in which peer learning could occur.

In 1999, hoping to apply these findings and transfer knowledge from the business world to the nonprofit sector, I formed CEOs Together—a peer support and training group, comprised solely of executive leaders of agencies that serve the public good. Between six and ten individuals attend a monthly, three-hour session. The meeting is professionally facilitated, group members make structured presentations on organizational issues they face. Yearly membership is \$3,100, compared with an annual average of \$11,000 for comparable services in the for-profit sector. Two to three times each year, CEOs Together features an expert speaker addressing a subject of special concern to nonprofit leaders. For an additional \$125 per hour, a participant can meet by appointment with a facilitator for a one-on-one intensive session.

At the end of each CEOs Together meeting, participants take ten minutes to reflect on the session and evaluate its effectiveness. Two weeks after each meeting, minutes are mailed to all members. These notes allow participants to reflect again on their own contributions to the session and on the responses they received. To preserve confidentiality, the minutes include only the participants’ initials, and executives often request that they be sent to their home addresses.

## **Peer Group Model Results**

After having maintained CEOs Together for five years, it has been possible to interview the group’s members about the long-term impact of structured peer support on their work. Taken as a case study, the interviews revealed distinct patterns that reflect the key results of participating in group coaching. These results center

on four issues:

- *Addressing Isolation and Stress*
- *Breaking Patterns of Unproductive Behavior*
- *Developing Leadership and Modeling Behavior for the Organization*
- *Gaining Technical Assistance*

#### ADDRESSING ISOLATION AND STRESS

Julia Ritchie, co-facilitator of CEOs Together, is a specialist in process and group facilitation and president of Ritchie Consulting, an organizational development firm. She identifies lack of support as a common complaint among the top leaders in an organization. “In my work with EDs,” Ritchie says, “I’ve learned one of their primary concerns is isolation. They don’t have a safe space where they can struggle with their problems as executives.”

CEOs Together participants report that the group process admirably addresses this common issue by allowing them a peek into the organizational life of other agencies. Dr. Anne Elliott has served for eight years as executive director of Project Greenhope, a rehabilitation residence for women involved in the criminal justice system. She says, “the peer setting is refreshing because you begin to realize, ‘Oh, my problem exists at all nonprofits and not just mine. I’m not going crazy over here all by myself.’ I glean a lot from hearing other members talk about what’s going on in their particular organization. Learning about their difficulties and how they went about solving them and dealing with their staff is tremendously helpful.

“Sometimes hearing what goes on in other agencies makes you more thankful for your own,” she adds with a laugh. “The group helps you look at your agency differently and not blow things way out of proportion. It helps you bring your stress level down.”

Gabrielle Kersaint, executive director of the Brooklyn, Queens, and Long Island Area Health Education Center, approaches the issue from a slightly different perspective. “What has reduced my stress level is that the group helps me to identify problems before they get out of hand.” Kersaint has served in her current position for just over a year and has attended CEOs Together for eighteen months. “The group helps,” she says, “because its members relate to the issues I’m deal-

ing with, and many times they’ve gone through them themselves.”

“When listening to the others, I always hear things that are about me,” adds JoAnne Page, who has served for nearly fifteen years as executive director of the Fortune Society, a criminal justice advocacy and service organization. “We’re not dealing with such different things, and it’s tremendously useful to hear somebody else’s take.”

Since the key issues faced by nonprofit executives tend to remain fairly stable, group discussions tend to gravitate around a set of consistent themes. Julia Ritchie identifies the following as CEOs Together themes: boards of directors and developing board leadership; managing personnel, especially senior officers; EDs negotiating their own salaries and contracts; and expansion and management of organizational growth. Others point to financial considerations as another recurring topic. Recent outside speakers addressed board governance and the effective use of an executive assistant. We ask our experts to first listen to the executives report on their current dilemmas, so they can then tailor their presentations to the needs of the group.

JoAnne Page notes the difficulty of finding appropriate ways for executives to get the counseling and supervision they need. “I think that if you’re a CEO, you need the same kind of support, counseling, and supervision that you need in a senior management position. But as a boss, you can’t find it within your organization. If you’re not the boss, you can go to your peers. The boss can’t do that. I learned that from experience,” she admits, “by getting burned. You can’t make peers out of people who report to you without violating your role in a way that damages everybody. It’s not a fair position for them and it’s not an appropriate role for you. Getting burned,” Page adds, “is the most effective learning experience.”

#### BREAKING PATTERNS OF UNPRODUCTIVE BEHAVIOR

Focusing on management skills and concrete problem solving separates group coaching from a simple support group model. Ritchie explains: “At each meeting we take an organizational or leadership dilemma and dissect it. The facilitators provide literature and other materials related to the issue, so we have an educational compo-

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ment. The group gives the problem perspective. It is made depersonalized and theoretical, but it's also very practical."

Participants report that they benefit when fellow executives approach their problem from a distance and with objectivity. Kersaint says, "Sometimes you're too close to a management problem to actually see it. The group helps you achieve perspective."

Elliott agrees: "You learn to trust the judgment of the others in the group. When a situation comes up for me, I look forward to hearing what the others hear from my description that maybe I haven't put together yet. The group has helped me see myself more clearly."

As group members interact over long periods, insights into individual leadership styles deepen. According to Page, "What has happened over time is that we've developed a kind of history with each other. We have a shared knowledge base of the issues each of us is dealing with and the key people we're working with. For example, I've been talking about trying to reduce my hours. I had an extremely valuable series of conversations about the level of executive assistant I needed. Some months later, after I hired someone who turned out to be truly wonderful, I was talking about how I could use her skills to expand my activities. And one of the people in the group said to me, 'Wait a minute, you were talking about reducing your hours? How does this fit in?'"

"That's the kind of critical self awareness you get from other people," Page continues, "when they've listened to you struggle with the same thing over and over again. It is really valuable."

Gabrielle Kersaint gives another example: "When I have problems with someone I've hired, I tend to be optimistic about the situation. I like to hire young people and mentor them. People in the group have said to me: 'Maybe you need to be more objective.' In one case, they had me write up core competencies of a job before making a hire. It worked," she reports. "They see your blind spots, and they'll point them out."

"Several times I thought I was going to leave my job," says Anne Elliott. "The people in the group have a historic view of my situation and who I am. They've gotten to know me, and when I talk about wanting to leave my position, others will remind me that I've raised that before. They will point to cases where I really needed to learn a lesson and grow in the position, not leave it. They ask, 'Do you really need to go at this time, or are you avoiding something?'"

"It's not that they're telling me what to do," Elliot goes on. "They set up scenarios where I can see myself better."

Facilitators can further this process by carefully monitoring the discussion and drawing out hidden subtexts.

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Several respondents reported that Julia Ritchie makes an especially valuable contribution to the group by putting into words what presenters often avoid expressing directly. By so doing, she highlights and affirms perceptions that executives have about themselves or their organizations that might otherwise remain unspoken.

Self-reflection, however, can be difficult. "It isn't always pleasant," Kersaint admits. "Sometimes I don't want to go to the group, because I know I'm avoiding things. Still, it helps me deal with those hard issues I'd rather brush aside or procrastinate over—like firing someone, or restructuring my board, or confronting someone about a negative behavior."

Ritchie describes the trend toward taking on hard issues as something that has grown over time. "Members of the group have taken more risks as they have gotten to know one another better. Those deepening relationships allow the group to be very direct and challenging, but not hostile. People are increasingly good at raising the difficult questions."

Ultimately, Elliott says, this noncompetitive feedback allows for an atmosphere that is both critical and supportive: "Group members have great memories. They're very analytical. And they care. The reason they remember so much about your situation is that they really want to help you."

#### DEVELOPING LEADERSHIP AND MODELING BEHAVIOR FOR THE ORGANIZATION

Management theorist Peter Senge noted in his popular work, *The Fifth Discipline*, that if a manager is unwilling to learn, most everyone else within that person's sphere of leadership runs the risk of failing to learn as well. EDs who have engaged in the group process agree. They see their learning mirrored in their organizations.

"If you're stuck in a particular place, you will make sure that the people who look to you for leadership are stuck in the same way," says JoAnne Page. "It's not deliberate, but you can't move beyond the point where you're stuck yourself."

In her work as a trainer, Julia Ritchie sees executives' improved communication skills in the group as a portent of better organizational leadership: "The participants can hone in on their own issues much more quickly. And they

frame the issues in more concise and sophisticated ways. Members who have been in the group over a period of years know what help they need. They are able to directly identify the questions they want answered. You have to believe that when people are able to communicate more effectively in the group, it helps them do the same thing in their organization, allowing them to address work problems more effectively.”

One specific group advantage that participants frequently note is coming away with an ability to make time for long-term thinking. This allows them to turn to the executive function of providing vision for the organization. Gabrielle Kersaint says: “The group helps you prioritize and get beyond the day-to-day. As an ED, you can spend your whole day just putting out fires. After the group, I’m able to do more of the longer-range planning that I know I need to do.”

Joanne Page says, “Dealing with our boards is something that every one of us needs to do better. Sometimes, in the press of daily survival issues, it gets pushed aside. The group reminds you of its importance. Part of what the meetings do is help you keep an eye on what matters, rather than getting dictated to by the pressure of the current crisis.”

#### GAINING TECHNICAL ASSISTANCE

CEOs Together participants are especially grateful for the technical assistance they receive. Elliott cites several specific issues the group helped her with when she was expanding her organization: “Moving through the process of building a new building. Getting approval through a community board. Generating legislative support. Getting funding. Hiring consultants.

“I got recommendations from the group for coaching a staff, for grant writers, for people to help develop a property. When I have a problem and don’t know where to go,” she adds, “I know the group will be a great resource. Their references are always excellent, because they won’t give you someone they don’t like.”

Page notes how the group helped her make an important decision about hiring an executive assistant: “I was seriously considering hiring at a lower level, because it would save the agency some money,” she explains. “One facilitator said, ‘Look at the cost of missing opportunities because you’re doing things you could delegate.’”

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The other facilitator asked, ‘What is the cost to you of having frequent turnover?’

“As a result,” Page continues. “I hired a much more skilled and expensive person. And I’m thankful I did. Now I can use my time more efficiently by delegating where I wouldn’t otherwise have been able to. And because I have someone who thinks at a high level, I have a partner rather than an employee I need to train.”

#### SUMMARY OF RESULTS

By addressing isolation and stress, breaking patterns of unproductive behavior, developing leadership and modeling behavior for the organization, and providing technical assistance, group coaching answers the core needs of most nonprofit executives. In so doing, it allows leaders to grow in their positions. Five years after the launch of CEOs Together, these four key issues continue to resonate, and the peer group model continues to provide an ever deeper and more expansive response to the needs of its members.

### **Barriers to Effective Group Process**

Participants, however, acknowledge some limitations to the group model, particularly in time allocation. With an individual coach, each executive spends the entire session discussing his/her own issues. CEOs Together facilitators encourage members to explore their issues at great depth, and while group participants note the benefits of hearing others’ situations, they also worry that when their time comes to present, they might get short-changed. “Sometimes it feels like time is not monitored effectively,” says Page, “which means that people who go last often run out of it.”

Anne Elliott agrees. “I’ve also felt frustration on occasion over the use of time. When a presentation goes on longer than it needs to, not everyone gets to do their go-around. And what I really value—what most of us value—is the go-around.”

An individual coach can tailor discussion to personal issues, such as career planning and development. Kersaint says she uses a coach for this purpose: “Identifying my strengths and my skills. Finding out what I’m good at, and what I want to do next. This was useful when I was leaving my last organization. But with the one-on-one coaching, I didn’t get the peer support. It wasn’t really problem solving, it was more of a self-portrait.”

JoAnne Page combines weekly consultations with

her personal coach with monthly group coaching meetings. She sees the two as complementary. “They’re both personal coaching,” she says. “But the difference is that CEOs Together lets me see people stuck in the same way I’m stuck. I see myself in my peers. The personal coaching doesn’t allow for that. It’s more like having somebody in a supervisory relationship who gives me feedback, not as a peer, but as an expert and a sounding board. Both forms of coaching are beneficial, but different.”

#### NOT FOR EVERYBODY

Finally, the peer-based model is not for everybody. “You have to be open to listening to critiques of your management approach,” says Kersaint. “When I first started, I was very impressed with the level of experience in the room. Most people had more experience than I did, and it was a little intimidating. You’re there bearing your soul. I thought these people must be looking at me and thinking, ‘My god, she should know better than that.’”

Elliott describes individuals ill-suited for the group approach: “If you’re not open to change. If you’re not open to constructive criticism. If you’re in denial. You’re not going to stay in the group.”

“Reticence among executives in sharing their problems with others is common,” says Ritchie. “But that’s the very reason the group model is so effective. It demystifies the process.” The experience of CEOs Together shows that most of the resistance experienced by executives quickly dissipates once they start participating in the group.

### **Recruiting and Retaining Group Members**

CEOs Together is structured as a long-term model, focused on addressing executives’ long-term development needs. Thus, the majority of members have made ongoing commitments to group participation. Many of the original members remain in the group five years later. Some, however, have left for various reasons, after short or more extended stays.

Recruiting enough executives to maintain full membership is a continuing difficulty. But this is not a problem unique to the peer group model. It plagues the entire coaching field. Group coaching requires the active engagement of many busy individuals. CEOs Together started with eight members, and has since vacillated between six and ten. Facilitators and participants agree that the group could accommodate as many as twelve. “It works better with more people,” says JoAnne Page. “You

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get more diversity of view. Consistency in attendance also matters. The sense of shared history only develops when people attend regularly.”

Elsa Ríos, now president of Community Impact Consulting, left CEOs Together after leaving her last position as an executive director. “After I was no longer an ED, it was time for me to move on,” she says. “At the time, I didn’t think that the knowledge I acquired in the group would apply to my new job. I’ve since found that when working as a consultant to other executives, I use many of the insights I gained from the group.”

Asked whether she has considered rejoining, Ríos says she has not. “It’s really a place for nonprofit executive directors. The fact that they’re all practitioners, and can present their own problems and experiences, is what makes it like a laboratory for studying nonprofit organizations.”

Other former group members raise the question of cost. “My reasons for leaving were purely economic,” says Richard Haymes, executive director of the New York City Gay and Lesbian Anti-Violence Project. “I couldn’t justify the expense based on our budget and cash flow. I got a lot out of it while I was in the group, but, financially, I just couldn’t afford to continue. I had been given a grant to attend from an anonymous donor. When that grant ended, I had to leave.”

Another subsidized member also left the group when the subsidy expired. His report and Haymes’ raise questions about “scholarships” as effective means of promoting group commitment. Although not conclusive, the experience of CEOs Together suggests that having a financial stake in group coaching is, as in personal psychotherapy, part of the intervention. Those who had to find the organizational resources to support their participation tended to make a longer commitment to the group than did those whose memberships were subsidized.

This is not to argue that scholarships have no place. Intermediary organizations like the United Way or Federated groups who support their executive members by paying for professional development provide important opportunities for EDs to reap the benefits of group coaching, and see how peer support can impact their work. The ideal scenario would be for an intermediary organization to pay for sixty percent of the costs and the CEO to pay the balance.

More than two decades of experience in the non-profit world lead me to conclude that the management adage, “you value what you pay for,” holds true for both for-profit and nonprofit executives.

## Valuing Professional Development

Clearly, the biggest hurdle facing nonprofit executives seeking appropriate support is the perception that leaders cannot spare the time or the money. CEOs Together provides compelling reasons for boards of directors, intermediary organizations—and nonprofit EDs themselves—to reexamine that perception.

“I appreciate that nonprofits don’t have a lot of unrestricted money,” says Julia Ritchie. “It’s very hard for EDs. They see the expense of professional development as an indulgence, but it’s not. People have to weigh the costs of being isolated and without support, they have to factor in the expense of making mistakes because they have no one to talk to about critical issues. Plus, there’s an incredible value-added in learning from others’ experiences. It’s an expedient way to deepen your understanding of the role played by executives and the issues they face.”

“A lot of boards will send you to a single training, but they won’t pay for an ongoing group,” says Gabrielle Kersaint. “I think EDs need to make their development part of their package when they take a job. It impacts their success.”

Ritchie disagrees. “It’s not a form of compensation,” she argues. “You go in there and work. It’s about being effective in your job and seeking outside guidance. And it’s as much preventative as it is an intervention.”

## Helping EDs Stay with the Work They Love

If the nonprofit community is to address the crisis of burnout and turnover among its leaders, it must recognize the importance of professional development. The growth of individual coaching over the past decade is a positive sign. However, the case study of CEOs Together offers a solid argument for the peer group model as an effective response to the unique needs of executives working for the public good. As a cost-effective option for leadership development, it not only helps foster more effective nonprofits, it also enables EDs to stay connected to the work they love.

Few recognize this better than the EDs themselves. “We need to educate boards and organizations on the importance of supporting their executives,” Kersaint says. “There are a lot of EDs out there who never want to be EDs again. We’re losing talent right and left. We need to be replenished. We need to be supported. It’s very stressful work. It can be lonely without someone to talk to about our professional problems.

“We should be able to commit time to our development,” Kersaint concludes. “We need it.”

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