

**Peer Learning Circle Pilot Project
Final Report**

Cultural Careers Council Ontario

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“The Peer Learning Circle offers EDs an opportunity to confer with their peers that they don’t generally have otherwise. The value in this is twofold. First, each member of the group can benefit from the knowledge of a number of people in similar positions meeting similar situations and challenges, and can thus become better equipped for their own position. Second, hearing from others about experiences similar to one’s own is affirming and builds self-confidence....”

– Circle member

Overview

The cultural sector makes tremendous artistic, social and economic contributions to the province, and is a significant and growing part of Ontario's economy and labour market. In terms of building and maintaining capacity, arts and heritage service organizations and their executive directors are critical to the long-term health of the cultural sector. Culture Careers Council Ontario (CCCO) is aware that improving the skills of workers and leadership staff within these organizations supports the capacity and sustainability of the sector as a whole.

As a very labour-intensive sector, a skilled, innovative and resilient workforce is critical for the cultural sector’s continued growth and success.

Through previous study and input from arts professionals, CCCO identified the need for, and interest in, specific professional development opportunities for senior artistic and administrative leadership of cultural organizations.

The Pilot Project

CCCO reviewed established professional development models to support senior level cultural workers in Canada and the United States. Among the models reviewed were peer learning circles. A peer learning circle is a technique used to facilitate individual and collective learning and can be defined as a “group of people who form an articulated, formal, sustained partnership around a topic of common interest.”¹ The success of a Calgary learning circle, documented in a report called *Strengthening the Capacity of Executive Directors* as part of the National Learning Initiative for the Voluntary Sector in 2004², and similar initiatives in US, demonstrated the potential value of this model of professional development.

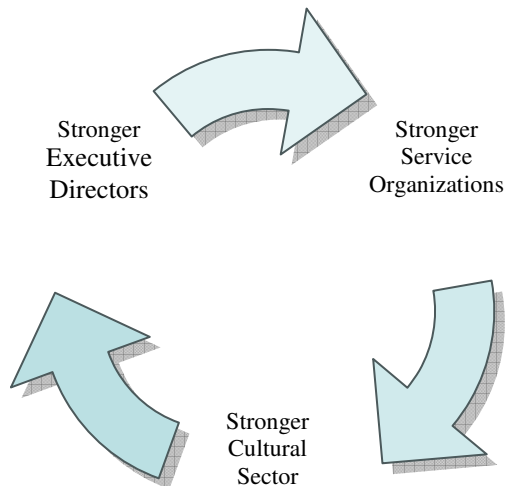
With the financial support of the Ontario Ministry of Training, Colleges and Universities, in late 2007 and early 2008, CCCO piloted a peer learning circle format with a group of executive directors of arts service organizations to address the issues they face. The Peer Learning Circle (PLC) Pilot Project involved nine individuals from different sub-sectors in culture and was held in Toronto.

The aim of the PLC Pilot Project was to explore the effectiveness of the peer learning circle approach as a tool for the professional development of mid-career executive directors in small to medium-sized arts and heritage service organizations. It was assumed by CCCO that by improving the skills of executive directors the capacity and sustainability of their employing organizations would also be improved. In turn, stronger service organizations would be better able to provide services and support to the sector and the sector as a whole would be stronger.

1 Erklenz-Watts, Michelle, Theresa Westbay, and Eileen Lynd-Balta. 2006. An alternative professional development program: Lessons learned. *College Teaching* 54 (3):275-279.

2 Seel, Keith and Anita Angelini. 2004. *Strengthening the Capacity of Executive Directors: Highlights*. A Pilot Project for the National Learning Initiative for the Voluntary Sector in Partnership with Community Foundations of Canada.

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The **goal** of the PLC Pilot Project was to help participants improve their capacity to identify and address the key issues they face in their work as executive directors.

The **objectives** of the Pilot Project were to:

- help participants exhibit more confidence in their ability to identify and address issues in the workplace and
- feel a greater sense of responsibility and support for their own professional development through their participation in a community of learners (the peer learning circle).

In order to achieve this, participants were assisted in the development of skills in critical thinking, reflection, self-assessment and decision making. Participants discussed current projects, shared insights and resources, supported and challenged each other and developed individual action plans. Circle members identified individual goal(s), committed to taking action between meetings to address their goal(s) and then reported on progress at subsequent meetings. Although there was a structure for each meeting, the content was determined by the participants based on the issues they considered to be priorities.

Carrie Brooks-Joiner & Associates was contracted to conduct background research on peer learning, develop a framework for the pilot as Phase I and facilitate the Peer Learning Circle as Phase II. The consulting team for Phase I included Carrie Brooks-Joiner and Christine Castle. The research and framework were summarized in a separate Phase I report.

This final report addresses Phase II, the piloting of the framework, and assesses the effectiveness of the peer learning circle approach as a tool for the professional development of mid-career Executive Directors in small to medium-sized arts service organizations. The report also includes an overview of the

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issues the participating Executive Directors face and the strategies they used to address them during the pilot and concludes with recommendations for next steps.

Pilot Promotion and Call for Participants

The Pilot Project was promoted through the existing channels of the CCCO and its partners. A media release (appendix I) and backgrounder providing an overview of the Pilot and the call for participants were posted on the CCCO's website and hard copies were circulated by mail and fax to organizations within CCCO's database (appendix II). A more detailed backgrounder was available on request (appendix III).

An information session was held on August 15, 2007 to provide the opportunity for face-to-face discussion of the project and for potential participants to meet the facilitator. Approximately 15 people attended the information session and a further 5-7 made inquiries by telephone or email about the pilot.

There was interest in participating by executive directors of arts and heritage organizations that were not service organizations. However, executive directors of service organizations remained the target for the pilot.

The Application Process

Interested participants self identified and applied for consideration to participate. The application package included:

- Participant's letter of interest
- Application form (appendix IV)
- Participant release form (appendix V)

The target segment was identified as executive directors employed by small to mid-sized service organizations and with five or more years experience in senior

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management. A variety of experiences and perspectives within the pilot was considered desirable.

Potential applicants who did not meet the selection criteria were gently discouraged from submitting an application.

The Selection Process

Staff from CCCO and the facilitator reviewed all applications and made decisions regarding candidates accepted into the Pilot.

Eleven complete and eligible applications were submitted and all were selected to participate in the project. At the facilitator's suggestion two participants withdrew after acceptance as they could not meet the time commitments required and would miss the first, or more, circles. Nine participants were confirmed as part of the pilot.

Successful participants were charged a \$50 participation fee as a symbol of commitment to the pilot.

The Participants

All participants met the criteria as *executive directors with over five years senior management experience in small- to mid-sized arts and heritage service organizations*. One organization, a dance company, while not solely a service organization, included some of the sectoral capacity building functions of a service organization and was deemed to meet the requirements of the pilot. Another applicant led a service organization on a contractual basis and although, not an employee, was deemed to meet the requirements of the pilot. There were no applicants from heritage service organizations.

Given the mandatory attendance throughout the pilot, it was anticipated, but not required, that participants would be from the Toronto area. In fact, only 3 out of 9 participants were from Toronto. Participants also came from Ottawa, London,

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Burlington, Hamilton, Belleville and Muskoka. The employing organizations included:

- community arts councils (3)

and service organizations which support the following cultural disciplines:

- performing arts (4) and
- writing and publishing (2).

They included national, provincial and community service organizations. All had a board of directors and at least two staff. Details about budget, programs, governance were not collected.

All participants signed a Participant Release Form confirming their agreement to participate in the pilot and to have their experience reflected in the final report.

The Pilot Framework

Planning Assumptions

The development of the Pilot was based on several initial assumptions. These included:

- The Circles are *facilitated in a face-to-face format*
- *The target participants are the most senior staff of service organizations in the arts and heritage sectors and to be selected from a self-identified pool*
- *Participation in the Circle is confidential*
- The Circles will be held in Toronto in a location accessible by public transit and where the confidentiality of the Circle could be maintained

The duration of the Pilot was *September 2007 to February 2008*.

The Circle Format

The Pilot Peer Learning Circle involved facilitated group meetings of the nine senior cultural workers. The Circles started in September 2007 and met five times over a six month period (no December session). Sessions were three hours long each (9:00 am – 12:00) and were held in a consistent location in downtown Toronto.

At the first Circle the participants established the following ground rules for all meetings:

- Confidentiality
- On time
- Respect for opinions
- Honesty
- Fair floor time
- Balance between the general and the specific

The Circles had a consistent structure:

- Opening –welcome & review of ground rules and Circle agenda
- Individual reporting on previous goal with entire group
- Tools and Tips
- Setting new goals and small group coaching
- Sharing new goals with entire group
- Closing

Issue identification, implementing a strategy for change and being accountable to the group for follow up are the key components of the peer learning circle process. At each meeting, Circle members identified one or more individual workplace, professional or personal issues they consider to be priorities, set a goal(s), identified next steps, and committed to taking action between meetings to address their goal. They reported on their progress at the following meetings and “checked in” with an identified partner between Circles. Worksheets

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provided a consistent format for recording goals and planned actions, and were used as reference when reporting at subsequent sessions.

Regardless of whether the goal set was for the organization, career related or personal, the actions identified had to be the *participant's* to take and be accountable for. This shift from identifying what the *organization* or *board* has to do, or *others* have to do, to what *I* have to do, was a challenge for some participants to make. After the first Circle, one participant commented “It’s different than I expected. I thought it would be more organization based but I’m glad it’s not.”

Unlike the Calgary peer learning circles which focussed on job satisfaction of Executive Directors in non-profit organizations, there was no structured workplace based curriculum.³ The CCCO pilot was designed to allow for organizational, professional or personal priorities to drive the experience and skill development for each participant. The pilot did include limited exploration of a topic of common interest identified by circle participants (employment arrangements) and more opportunity for such group-directed learning would be beneficial.

Evaluation Framework

The project began and concluded with a survey that probed the participants’ perception of their own capacity to identify and address key issues that they face in their work as executive directors, based on critical thinking and change management skills associated with peer learning circle participation. The surveys were completed prior to the first and after the last Circle.

A mid-point evaluation on the Circle process was also included and surveys were handed in directly to CCCO staff for tabulation and summarization.

³ The monthly structured topics within the Calgary pilot included: orientation to sector statistics; ED position descriptions; organizational structure; work relationships and personal motivators and skill use and development.

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In addition, the facilitator observed and took notes at all sessions to document progress and comments on the success or failures of the process. Each participant maintained an individual folder to which the facilitator had access. A copy of each participant's goals and actions were placed in the folder at the end of each session. Participants kept their own records in a binder which was not shared with the facilitator or other participants,

At the request of the participants, the majority of the last Circle was devoted to an open discussion of the pilot and development of recommendations from the participants. The participants' recommendations are included as appendix VI.

Results

The outcomes of the pilot were met although addressing the key issues of the cultural sector was a greater challenge than anticipated. The **goal** of the PLC Pilot Project, *to help participants improve their capacity to identify and address the key issues they face in their work as executive directors*, was based on the erroneous assumption that training would allow executive directors the ability to address the key issues. However, the key issues as identified by the participants--demand and resources--are systemic to the non-profit and cultural sectors and cannot directly be addressed through skill development and professional development opportunities. At best, change to systemic challenges is indirect and incremental.

Regardless, participants successfully set goals within issues that they considered to be priorities and ones that they could influence, and then developed strategies to meet them. Among the specific outcomes of the PLC Pilot are:

- Identification of key issues
- development and application of new skills
- application of new tools, techniques and technology
- new knowledge and learning
- development and use of a peer network
- enhanced personal reflection and awareness

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- positive changes in behaviour
- increased risk taking

These outcomes supported the participants professionally and personally and positioned them to manage and cope in their role as executive directors and to address organizational priorities. Executive directors who are functioning with a higher level of confidence and enhanced tools are well placed to strengthen their organizations and thus increase the capacity of the cultural sector.

Issues

As part of a pre-survey administered prior to the first Circle, participants were asked to rank the top three issues that they face as executive directors from provided list. They also had the option to add to the list. The top two issues were identified as:

- Growth of demand for services without corresponding resources
- Lack of operating funds

Anticipated Outcome Level of functioning

– participants will improve their capacities to identify and address the key **issues** that they as executive directors face

“Burnout” came in as a distant third.

In the first Circle, the participants did not focus on operational issues as part of the opening discussion about “Why Are You Here?” other than “roles of staff and board”. The majority of comments focussed on career development and the more personal side of the senior job. Specific skill or knowledge development included:

- time management and priority setting
- how to deal with other sectors
- see how others do stuff
- [and to gain] multidisciplinary perspectives

More personal reasons included:

- loneliness
- need help
- affirmation
- to get outside the locality
- “focus on my professional development”.

There was acknowledgement of the lack of training/professional opportunities, the lack of a clear path to the senior positions and how this leads to what one participant called “fraud syndrome”: the feeling of not feeling trained, confident or qualified to do the job.

The key issues that were identified in the post survey generally remained the same though burnout was of more prominence, “lack of clear direction from the board regarding organizational priorities” and “professional development” were added as issues.

Although the issues identified in the pre and post surveys remained fairly constant, the participants’ assessment of their attributes and skills (“level of functioning” and “behaviour”) showed a significant change with responses indicating much more confidence, a greater sense of responsibility for their own professional development, and increased use and application of strategies. Participants actively used the circle as a sounding board and there was demonstrated increased risk taking by several members. : For

Anticipated Outcome

Behaviour – participants will experience a sense of:

- confidence in their ability to identify and address issues in the workplace
- responsibility for their own professional development
- empowerment to set their own agendas for professional development
- participation in a community of practice

example, one participant, with the encouragement of circle colleagues, took a successful proactive stance with the board during a climate of conflict even though the action could have accelerated a dismissal without cause. Another participant raised an ethical dilemma within the Circle and sought broader feedback prior to taking action. The action, potentially could have jeopardized a job offer, but in the end, did not. While participants were not in a position to change such systemic issues as “lack of operating funds” and their goals throughout the pilot did not address the initially identified key issues directly, the changes in attributes and skills suggest that they are in a better position to manage and survive the work environment.

Skill Development

Skill development was another key anticipated outcome of the pilot. Participants demonstrated new knowledge and skills development in a variety of areas over the period of the Pilot.

“... I find the circle very useful, in helping us, collectively and individually to value ourselves, give us confidence to tackle difficult problems, and to overcome self-doubt.”

–Circle participant

Skill development and the opportunity to gain and apply new knowledge were built into the Circle model: Circles 1-4 included a Skills & Tools section as part of the agenda. Skills and tools included discussion, exercises and templates as appropriate. For example:

- The first Circle discussed goal development and the idea of “SMART”⁴ goals and other variations of the mnemonic.
- Circle 2 included success and learning journals as tools to track and celebrate progress. The exercise included defining personal success and how it changes over time⁵.

⁴ SMART = specific, measurable, achievable, relevant and time-based

- Circle 3 addressed “gremlins”⁶- identification of roadblocks to decision-making, and tips on “coaching”⁷ others to decision making as opposed to “managing” or “directing”.
- Circle 4 included the Six Thinking Hats⁸ approach to strategy development and decision making developed by Edward De Bono.

The skill and tool topic for the first session, SMART goals, was planned prior to the start of the PLC pilot as the ability to develop appropriate goals was key to the process. The topics for the second, third and fourth sessions were not identified prior to the start of the pilot as it was not known what skills and tools were needed to support the pilot process or the participants in their role as executive directors. The skills and tools for sessions two-four were identified by the facilitator during the pilot in response to the content of the Circle discussion and the dynamics

Anticipated Outcome

Skills – participants will develop skills in:

- supporting one another as learners (conversations, encouragement, group coaching, support groups, feedback, etc.)
- documenting and sharing reflections as a way to develop new knowledge (journals, reflection papers, oral dialogues)
- assessing expectations – how to determine collective expectations and agree on a process for assessing individual progress
- influencing and implementing change in their own workplaces

5 Success exercise based in part on Elizabeth Verwey’s success journal exercise for small business owners, sales professionals and entrepreneurs. Elizabeth Verwey. The Mentors Circle Clearing Your Path to Business Growth. Small Office Mentors 2006.

6 The concept of “gremlins” was informed by the “governance gremlins” concept in Tim Plumptre, “Getting to Good Governance: Overcoming the Hurdles” (Canadian Fundraiser eNews, August 2002) as reprinted by the Institute on Governance <http://www.iog.ca/page.asp?pageID=24&htmlarea=aboutUs>.

7 The handout on coaching questions was based in part on: Laura Whitworth, Henry Kimsey-House, Phil Sandahl (1998) Co-Active Coaching, Davies-Black Publishing, 288 pages.

8 Edward De Bono, Six Thinking Hats, Penguin, 2000, 177 p.

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of the group. The exercises were informed by other peer learning circle models and the facilitator's knowledge of such areas as group facilitation, coaching, leadership and project management.

Other tools, programs or resources that were identified by the participants as useful to mid-senior career cultural workers, or potentially useful, included: publications, grants, resource library, relationship brokering, as well as traditional professional development opportunities.

In Circle 5, three of the participants reported that they were regularly using a journal for personal reflection and record keeping. One had implemented a system of symbols to note successes and was making a concerted effort to celebrate progress. The idea of gremlins, introduced in Circle 3, carried through discussions in Circles 4 and 5 as participants were able to identify and label self-imposed restrictions to goal achievement such as lack of confidence, fear of failure and risk of non-support by the board. The idea of "celebration" introduced in Circle 2 also carried through following circles. There was increased awareness of incremental progress and acknowledgement of the value of *self* recognition (as opposed to recognizing and celebrating only staff or volunteer efforts).

Participants clearly supported each other's learning and goals. Communication among the participants between sessions was built into the process. At each session, participants were "buddied" and asked to "check in" with their partner at some point prior to the next session by phone or email to add an accountability milestone, motivate, and provide an opportunity to network. However, the amount of participant to participant communication between sessions exceeded the minimum expectation. In addition to the formal skills and tools included as part of the Circle agenda, participants, at their own initiative, exchanged documents (e.g. board policies), templates (e.g. workplan template, job evaluation forms), references (websites, books, and contacts) and experiences to support others' goals and actions. Some participants met socially as travel schedules allowed. The support and guidance provided by other circle members was frequently mentioned in the reporting portion

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of the Circle: for example, the business orientation of one guided another; the fitness goals of one inspired two others to adopt personal wellness goals.

Through open discussion participants were also able to identify information that would be useful to the group as a whole and developed a strategy to gain the data. Two of the participants were about to undergo a job performance review and three had established employment goals. Although all participants shared a job title⁹, they did not share common employment arrangements. At the request and direction of the participants during Circle 2, the facilitator developed and circulated an electronic survey to gather information on employment arrangements (salary range, benefits, performance incentives, life work balance) of the Circle members. The result of the survey was shared with the participants and CCCO (highlights are included as appendix VII).

The electronic survey tool (SurveyMonkey) used in the gathering of employment arrangement data was subsequently utilized as a new tool by two of the participants: one in the workplace and the other to gather marketplace information and further the development of a new business.

By Circle 2, in reporting on goal progress, participants noted that the accountability built into the circle process was a “driver” and that the goal setting and commitment to action provided clarity for next steps. One participant noted her own shift from “thinking to doing” and was able to report that “I did what I set out to do”.

However, also by Circle 2, one participant noted in the confidential evaluation that “I am very confused at how this exercise will enable me to develop professionally or have any use in the workplace. The participants are all very open and contributing people, the facilitator is professional. [The circle] will.... provide a network from which can draw in the future.”

⁹ Titles of participants included Executive Director, Managing Director, Chief Administrative Officer (CAO)

This early dissatisfaction was not evident in the final evaluation or expressed within Circle conversations.

Impact

Organizational impact was the fourth area of anticipated outcomes. There was demonstrated direct impact on the employing organizations. For example, one participant implemented a discussion with the Board of Directors and a succession planning process following a Circle dialogue. Although the ED has no intention of leaving the organization in the near future, this process led to an open and frank discussion of the role and attributes of the executive director and furthered the organization's governance. All goals set by another participant throughout the PLC pilot were directly tied to the step-by-step implementation of a workplace-based major project.

Anticipated Outcome
Impact - Improving the skills of executive directors of arts service organizations will help develop the capacity and sustainability of the sector as a whole

There was also demonstrated direct impact on the participants in their role as executive directors. One participant increased delegation to staff and changed the frequency and nature of ED/staff meetings to free up time to accomplish self-identified priorities. Participants reported an increase in “empowering staff”, being more “assertive with the board” and “managing priorities better”. One participant noted she has “learned to say no” to board and staff, is delegating more, and has taken increased control of the setting of her work priorities and time. The Circle was mentioned by one as “my backers” and that “I feel I have a team backing me...”

There was also demonstrated personal impact on the participants. At the first Circle, a surprising outcome was that three of the participants developed goals to find new employment. By the end of Circle 5, two of the participants had secured new positions within the cultural sector and a

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third was developing a new fitness service business targeted to arts clients. (Initially, some participants quietly bristled at the new employment goals of their three circle colleagues and perceived them to be disloyal to the intent of the Pilot and the commitment of the employing organizations. However, the discomfort dissipated and the employment goals were supported and success celebrated.) Several of the participants adopted and acted on personal fitness and work/life balance based goals.

One participant entered into a formal mentorship relationship to gain additional support for the development a new business stream. That same participant also won an Ontario Trillium Foundation Arts and Culture Award for her work and was accepted into a local Innovators Program. The program matches ten specially selected innovative entrepreneurs with ten seasoned business professionals to work together over the course of a year to address issues, challenges, opportunities and best practices.

In the mid-evaluation one participant noted that:

“The Circle has so far given me a great deal of confidence to go forward with an idea I've had for a long time, but was lacking something... courage? structure? I'm not sure - but the circle has provided a support structure that is allowing me to move along with my plans to develop this idea....”

Another wrote:

“I find the circle very useful, in helping us, collectively and individually to value ourselves, give us confidence to tackle difficult problems, and to overcome self-doubt”.

At the last Circle, one participant shared that she is sleeping better, eating better and is setting aside time for personal writing and that the experience has “given me confidence to listen to my common sense”.

One participant, in the throes of board-driven organizational restructuring, board conflict and the resulting job insecurity, described the situation in

the post-survey and expressed, “I feel a great deal of pressure and uncertainty at the moment”. The ED also noted “I would like to see the Peer Learning Circle continue as 6 meetings were barely enough to effectively deal with issues that we as Executive Directors face”.

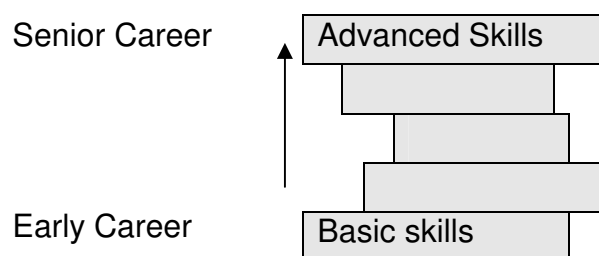
Although the context of the Peer Learning Circle Pilot was strongly rooted in the cultural sector, the personal, professional and organizational outcomes are wholly transferable within the sector and to other sectors. It was the participants’ employment context and the content of the Circle conversations that made the experience unique to the cultural sector. However, it must be recognized that although the outcomes of the Pilot supported job retention and new employment within the sector, the outcomes also support the potential to exit from the cultural sector. In the long term, it is both the broader Ontario workforce as well as the cultural sector that has the potential to benefit from peer learning circles.

Other Observations

Re-examination of Professional Development for Senior Cultural Workers

This project, and the participants’ focus on personal development, suggests the need for a re-examination of professional development for the senior cultural worker to take into consideration not only skills development, but other values and factors.

Professional development is often regarded as the building of skills throughout a career. The worker moves through basic to advanced skills development. It assumes that the longer the career, the greater the complexity of the skills that are added:



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This building of skills also allows the worker to move “up” in an organization and/or from small to bigger organizations.

However, small, or non-existent, professional development budgets and time pressures make ongoing skill development a challenge. There is also the limitation of available professional development opportunities and their focus on operational requirements such as budgeting, and human resource management. Such skill development, while useful, does not necessarily address the complex and variable daily work environment of an executive director. The participants noted that they need access to information/skills/best practices in response to a specific circumstance and that knowing where to get immediate assistance or resources, or the assistance of a colleague, were of greatest benefit to themselves as executive directors. While the participants agreed that a “curriculum” for skill development was possible for the senior levels, it should be in addition to a circle-type environment that draws on a peer network and its collective skills and knowledge.

The egalitarian and multi-perspective peer-to-peer aspect of the Pilot as opposed to a hierarchical mentoring structure was appealing to participants. Although three participants mentioned that they have (or had) mentors, others did not consider a similar arrangement as either desirable or achievable. Several participants were mentoring other workers.

“There is immense value in the Peer Learning Circle because the opportunities to interact with peers are extremely limited in our field and because the collective knowledge has far greater legs than a single mentor could provide”.

– Circle member

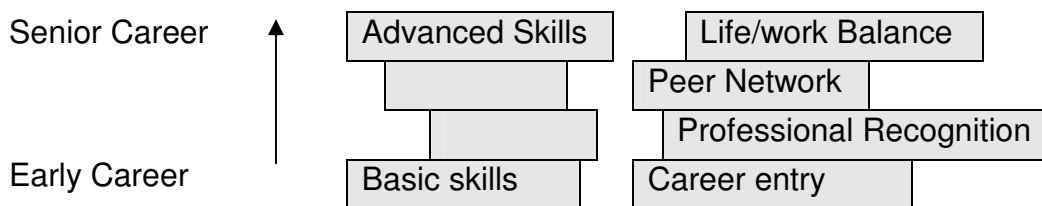
Rather than look at professional development as a layering of skills with increasing complexity throughout a career, a model that looks at the lifecycle of a cultural worker, similar to the lifecycle of an organization, is perhaps more apt.

The personal definition of success changes through one’s life and career. As an exercise in Circle 2, participants defined personal success by decade: under 10 years old; under 20 years and so on. Success in the under 10 decade included

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acquisition of specific skills or milestones such as “learning to ride a bike”. Success at less than 20 years celebrated growing independence: “getting my own apartment” and “getting my license and first car”. Career and personal milestones dominated the under 30 and under 40 decades: “established my career”, “received a major community development award”, and “parenting my son”. The over-40 category tended to shift to life work balance: “found my passion”, “expanding work focus outside of theatre”, and “redefining myself”.

Professional development must respond to the changing concept of career and life success and take into consideration the evolution from career entry, career establishment, to professional recognition. It must also acknowledge the growing importance of peer networks, and the later-in-life desire for life/work balance and meaning.



Such a model recognizes a career as part of a personal and professional cycle with interwoven skills development and values. Such a cycle suggests that professional development throughout a career involves not only a change in content, but in format and technique. The career life cycle model also allows for different retention strategies at different points in a career. Opportunities for professional recognition and accreditation may be early career incentives while opportunities for wellness, personal development and life/work balance may be important retention incentives for senior career workers.

This preliminary model can be informed by the literature on motivation of adult learners, the relationship between late life adjustments and self directed learning, and the life long learning

“The circle has great value because usually one meets colleagues in a business forum, not in a setting that fosters mentorships and reveals commonalities. The Peer Learning Circle has created a community and I will connect with these participants in the future.”

-Circle member

required as part of ongoing for professional training.

Summary & Recommendations

The impact of the Peer Learning Circle Pilot on the professional and personal lives of participants and their organizations strongly suggests that the model of a peer learning circle is an appropriate development model for mid to senior career cultural workers and potentially for other segments of the cultural workforce.

Based on the outcomes of the PLC Pilot, the input of the participants and the facilitator, a series of recommendations follow to implement three types of circles:

- A second peer learning circle targeted to executive directors of arts and heritage service organizations with over five years senior management
- Continuation of the Pilot group for a second 6 month term
- Additional peer learning circles with other target groups

There are also recommendations for minor tweaking of the basic format in the areas of:

- Duration of Circle Cycle
- Duration of Each Circle
- Circle Composition- Participants
- Circle Composition- Geographic Scope
- Costs
- Facilitation

Given its effectiveness in addressing skill, career and personal development through a peer-to-peer relationship it is particularly suited for the mid to senior career worker. There is value in establishing an additional senior-level circle to see if the outcomes are consistent and the exercises and worksheets appropriate for a different group of participants.

Recommendation: That a second peer learning circle be formed targeted to executive directors with over five years senior management experience

Overall there was a high level of satisfaction with the Peer Learning Circle Pilot Project by participants and an expressed interest in continuing to meet as a group. It was expressed by the Pilot participants that the initial five meetings was too few and that an additional six months would allow for achievement of longer term goals and further heighten the network among the participants.

The shared job title “Executive Director” and type of organization as “service organization” provided sufficient commonality, or perceived commonality, within the group that there were shared issues and concerns. The mix of disciplines, career paths, and personal styles provided a useful diversity of perspectives, goals and tools to share. One participant commented that the Circle is “...useful because other members do different things but also because members do the same thing I do”. Another noted in the mid-evaluation that: “Members have a first-hand working knowledge of what I experience as an Executive director, not simply a frame of reference. I think it is very important that the criteria for “peer” were kept specific when choosing participants for this circle. It has resulted in actual learning as opposed to “information gathering”.

Yet, the fact that all the employing organizations were service organizations actually had little bearing on the content of the Circle and the goals that were set. The Circle easily accommodated the change in employer for two of the participants during the Pilot. One participant, whose employer changed from a cultural organization to a municipality, assumed she would have to leave the circle as she no longer met the participation criteria. The Circle discussed it and agreed she should stay. This suggests that the mix of personalities and the common experience was, or became, a stronger bond than the type of employing organization. It is recommended that the initial Pilot Circle continue for a second term to observe whether the group continues to have sufficient commonality to function effectively and to support each other and to track goals and actions over a longer term.

Participants are willing to explore a cost sharing arrangement with CCCO.

Recommendation: That the Pilot group be supported to continue for a second 6 month term.

Given the success of the Pilot and US models it is assumed that the model of peer learning circles is transferable to any career segment or discipline segment of the cultural sector. The response by cultural organizations when the Pilot was announced, and feedback from a session on the PLC Pilot at the 2007 conference of the Ontario Museum Association, suggests that there is interest in participating by other segments. Potential target groups are early career cultural workers (such as the Emerging Arts Professional Network, a national group of young administrators), and circles by career segment (e.g. curators).

The extent of transferability of the model to other segments and the appropriateness of the exercises and worksheets is not known and is worth exploring.

Recommendation: That additional peer learning circles with other target groups be formed

Duration of Circle Cycle

The Pilot was six months long with five face-to-face meetings. There was no Circle scheduled for late December.

While the five meetings of the Pilot was a long enough cycle for the group to “gell” and for individuals to have individual results, there was the sense that it was not long enough and participants expressed the wish to continue meeting.

In Circle five, participants discussed the possibility of increasing the frequency of meetings to every two weeks or two days every month for future Circles, and while these changes were deemed desirable, they were not seen as practical.

CCCO - Peer Learning Circle Pilot Project

Although one 6 month cycle was considered too short, the knowledge that the Circle was time limited did maintain or increase the commitment to attend and to show results. To make future circles indefinite in duration could weaken their effectiveness. A renewable term would allow Circles that wish to continue the option while providing individual participants with a marker to re-examine commitment, goals, or to withdraw.

Recommendation: Circles meet monthly for a renewable 6 month cycle.

Duration of Each Circle

The Circles within the Pilot were three hours long (9:00 am to 12:00 pm). The 9 am start time and half day format was based on the assumption that participants would be from the GTA area and would accommodate the Circle within a regular work day. However, participants expressed the willingness to make a larger time commitment to allow for a longer working session. Detailed case studies and opportunity for group coaching for Circles 2-4 were considered during the planning phase but were not included given the large size of the group and lack of time within the three hour session. A longer Circle would allow for additional time for “peer coaching” and for focussed discussion of issues of common interest to the group and would add to the richness of each Circle.

Recommendation: that Circle meetings be lengthened from three hours to six hours

Circle Composition- Geographic Scope

The peer learning circles models that were examined in the research Phase I tended to draw from a single geographic area. This minimizes travel and serves to build a local network among the participants. One of the (incorrect) assumptions of the Pilot was that it would draw from the GTA. However, in Circle 5 the participants noted that one of the strengths of the Pilot was that it *did not* draw from a small geographic area.

CCCO - Peer Learning Circle Pilot Project

It was noted that a single geographic area was too small a cultural community and likely would bring together cultural workers who knew each other and worked together, or knew of each other. This did not effectively build a new peer network and it was perceived as having the potential to compromise confidentiality and the freedom to discuss personal and/or workplace issues and goals.

Recommendation: Circles draw from a broad geographic area

Costs

At the conclusion of the Pilot participants were asked to suggest a future fee for participation. There was general agreement that the value was comparable with programs such as The Banff Centre's Leadership Program and that a cost of \$500 - \$1000¹⁰, similar to a major conference, was reasonable. It was also noted that such a fee would make it prohibitive to some cultural workers and that travel and accommodation was in addition to any fee charged.

Six of the participants travelled to Toronto to participate in the Pilot and incurred direct costs of driving, commercial transportation and in some cases, hotel. Some stayed with friends and family. Employers did not cover these costs in all cases. There was tremendous commitment to participate in the Pilot by travelling participants.

One participant was successful in obtaining grant funding from the Compass Program of the Ontario Arts Council. This grant off-set the Ottawa –Toronto flying costs and accommodation. To avoid multiple applications to OAC for funding for the same Circle, a single application from CCCO on behalf of participants could effectively increase access and ensure a broad geographic draw. Alternatively, dedicated funds could be administered by OAC or other funder.

¹⁰ The tuition for Banff Leadership Development Programs range from \$3,800 - \$5,000.

CCCO - Peer Learning Circle Pilot Project

Other potential funders of Peer Learning Circles include the Ontario Trillium Foundation and the federal Department of Canadian Heritage's Canadian Arts & Heritage Stabilization Program.

Recommendation: CCCO broker travel and or participation bursaries for participants

Facilitation

At the conclusion of the Pilot, Circle participants were asked if they felt it was possible to self-facilitate the Circle as is done within other models. One participant said there is a "danger to be self-facilitated" and another concluded it was "impossible". Participants noted that it would "detract from the personal experience" and that it would be "strange dynamics to facilitate once and then rejoin the Circle", and that the "dominant personalities will come out". Neutral facilitation was viewed as key to managing the Circle's time and maintaining focus. Knowledge of the cultural sector and ability of the facilitator to contribute cultural-based content to the conversations of the Circle was considered desirable.

Effective facilitation of a Circle requires preparation and skill. Rotating the facilitation responsibility among Circle members or the use of volunteer facilitators, as used with other models, are unlikely to meet the expectations of participants, especially senior-level participants. In order to ensure that future Circles are effective, CCCO requires a pool of experienced facilitators to draw from as needed and who are familiar with the objectives of a peer learning circle and have credibility within the cultural sector.

Recommendation: an outside facilitator continue to be used for Peer Learning Circles

Recommendation: CCCO develop a workshop to train a core of facilitators to support future circles

Appendices

- Appendix I - Media Release
- Appendix II - Short Backgrounder
- Appendix III - Long Backgrounder
- Appendix IV - Application form
- Appendix V - Participant Release form
- Appendix VI - Recommendations from Circle Participants
- Appendix VII - Highlights of Survey – Participants’ Employment Arrangements

Appendix I - Media Release



CCCO OFFERS PROFESSIONAL DEVELOPMENT OPPORTUNITY For ARTS SERVICE ORGANIZATION DIRECTORS

FOR IMMEDIATE RELEASE July 11, 2007: Cultural Careers Council Ontario (CCCO) is pleased to announce *The Peer Learning Circle Pilot Project*, an innovative participatory approach to professional development, for executive directors of arts, cultural and heritage service organizations.

This pilot project will give 10 individuals the chance to take part in a learning circle to address the complex issues they face as leaders in the cultural community. This pilot is one element in a new multi-faceted project, *Career Development for Cultural Workers*, recently announced by CCCO, that will strengthen professional development for people working in the cultural sector.

CCCO is committed to addressing human resources issues within Ontario's cultural sector through its research and information, services, career development programs and publications. CCCO's job board and website – www.workinculture.ca – are among the most popular cultural web tools today. *The Peer Learning Circle Pilot Project* builds on previous research by CCCO.

CCCO's Peer Learning Circle Pilot Project will provide selected executive directors with a confidential and supportive group learning approach in which they can share experiences, challenges and ideas with a like-minded community of learners. The circle draws on the collective insights of the group to further individual goals and will be led by an experienced facilitator and consultant, Carrie Brooks-Joiner.

Executive Directors who participate will benefit by

- expanding their network of colleagues
- identifying workplace issues and action-based responses
- increasing their critical problem solving skills

Participation is confidential, but the outcomes of this pilot will be shared with the broader cultural community. CCCO wants to acknowledge the generous support of The Sectoral Initiative Fund of Ontario's Ministry of Training, Colleges and Universities for the *Peer Learning Circle Pilot Project*.

FOR MORE INFORMATION, PLEASE CONTACT:

Robert Johnston, Executive Director

Susan Cohen, Program Manager

Karen Ennis, Administrator

T: 416.340.0086

email: info@workinculture.ca

or visit our website: www.workinculture.ca

Appendix II - Short Background



What is the CCCO Peer Learning Circle Project?

CCCO is committed to strengthening the human resources within the cultural sector to increase individual and organizational capacity. The CCCO Peer Learning Circle Project is an opportunity for Executive Directors of Ontario's arts, culture and heritage service organizations to participate in the development of a new approach to professional development in the cultural sector. Using an innovative participatory group learning approach, the pilot will support senior staff to address the complex issues they face. The outcome of the pilot will be shared with the broader cultural community although participation is confidential and participants will not be identified in any reports or publications.

Who Should Apply?

Executive Directors of Ontario service organizations in the areas of performing arts; visual arts; crafts and design; writing and publishing; media arts; and museums, heritage and libraries. Participation in the pilot will be limited to ten people. The purpose of the application process is to ensure that the pilot features a balanced mix of participants from various areas, fields and sizes of organization.

What is the Cost?

This pilot is subsidized by the Ontario Ministry of Training, Colleges and Universities and is offered for a fee of \$50 for five facilitated sessions. The estimated value of the program is \$500 per participant.

What Is the Time Commitment?

The pilot will run from September 2007 to February 2008. Each participant commits to one 3 hour meeting per month plus approximately 3 – 6 additional hours each month in preparatory and follow-up activities.

What Will You Get Out of It?

By participating in the CCCO Peer Learning Circle Project Pilot you will be able to:

- Build a peer-based network with diverse perspectives and experience
- Identify workplace issues and action-based responses in a collaborative and confidential environment
- Increase your capacity for enhanced problem solving and critical thinking skills leading to increased capacity for your organization

How Do I Find Out More?

CCCO - Peer Learning Circle Pilot Project

For more information and how to apply you are invited to attend a drop-in information session on August 15 from 3:30 – 5:00 at the Editors' Association, 27 Carlton St, 5th floor, Toronto, or contact:

Cultural Careers Council Ontario
416.340.0086
info@workinculture.ca

Carrie Brooks-Joiner
Project Facilitator
Carrie Brooks-Joiner & Associates
905-637-5338
cbrooks-joiner@cogeco.ca

Appendix III - Long Backgrounder



CCCO Peer Learning Circle Pilot Project

What is the CCCO Peer Learning Circle Project?

CCCO is committed to strengthening the human resources within the cultural sector to increase individual and organizational capacity. The Peer Learning Circle Project is an opportunity for Executive Directors of Ontario's arts, culture and heritage service organizations to participate in the development of a new approach to professional development in the cultural sector. Using an innovative participatory group learning approach, the pilot will support senior staff to address the complex issues they face. The outcomes of the pilot will be shared with the broader cultural community.

What is Peer Learning?

Peer learning is learning from, and with, peers in a mutually supportive environment.

What is a Peer Learning Circle?

A Peer Learning Circle is a group of people who come together with a shared interest and who form a community of learners. A Circle gathers for confidential sharing of experiences and challenges and draws on the collective experience and wisdom of the group to further individual goals.

Who Should Participate?

The pilot is exclusive to ten Executive Directors of Ontario service organizations in the areas of performing arts; visual arts; crafts and design; writing and publishing; media arts; and museums, heritage and libraries.

Priority will be given to Executive Directors employed by small to mid-sized organizations and with five or more years experience in senior management.

What are the Benefits of Peer Learning Circles?

Builds a peer-based network with diverse perspectives and experience

Supports identification of workplace issues and action-based response in a collaborative and confidential environment

Increases capacity for enhanced problem solving and critical thinking skills leading to increased organizational capacity

Where Will the Circles be Held?

The Circle will be held at a downtown Toronto location which is accessible by public transit.

What is the Time Commitment?

The pilot will run from September 2007 to February 2008. Participants commit to one 3 hour meeting per month and follow up actions for the duration of the pilot.

Circle meetings will be held from 9:00 a.m. – 12:00 p.m. on the last Wednesday of each month.

September 26, 2007

October 31

November 28

December – no meeting

January 30, 2008

February 27

What Happens at the Meetings?

The Circle includes the 10 participating Executive Directors and a facilitator. Participants will discuss current projects and identify workplace challenges. They will share insights, knowledge, and experience and will support and challenge each other. Circle members

will identify individual goals, commit to action between meetings, and report on progress at subsequent meetings.

The Circle will be facilitated to keep the conversation on track, ensure everyone has the chance to participate, and that the process supports learning and meeting individual goals. Regular evaluation about the process, outcomes and facilitation will occur during the pilot.

What is Needed to Apply?

To be considered for the pilot, you need to submit the following:

Application Form
Letter of Interest
Current Resume

How Will Participants be Selected?

Staff from CCCO and Carrie Brooks-Joiner, the Project Facilitator, will review all applications and will make decisions regarding candidates accepted into the pilot. A diversity of perspectives, experience and types of organizations will be sought. Priority will be given to Executive Directors employed by small to mid-sized organizations and with five or more years experience in senior management. Successful applicants will be asked to sign a Participant Release form.

Who will Facilitate the Meetings?

The Circles will be facilitated by Carrie Brooks-Joiner. Carrie is the principal of Carrie Brooks-Joiner & Associates, a consulting firm which specializes in management and research services. Her clients include government and organizations in the arts, heritage, social service and health sectors.

Carrie has been active in the cultural community for over two decades and brings her research, management and consulting experience to her commitment to strengthen the capacity of the sector. She is an experienced facilitator and has convened numerous roundtables, community consultations and planning retreats. Carrie teaches at the university level and is a frequent workshop leader and conference speaker.

As a volunteer, Carrie is the Past President of the Ontario Museum Association and is a Board member of Performing Arts Burlington and the Burlington Public Library.

Are the Conversations Confidential?

Yes. The discussions within the Circle are confidential to the participants. Your participation in the pilot will also be held in confidence.

What is the Cost?

This pilot is subsidized by the Ontario Ministry of Training, Colleges and Universities and is offered for a fee of \$50 for five facilitated sessions. The estimated value of the program is \$500 per participant. The fee and a signed Participant Release form are due on acceptance of participation in the pilot.

What is the Deadline Date to Apply?

The deadline to submit an application is August 31, 2007. Successful applicants will be informed by September 10th.

How Do I Find Out More?

For more information you are invited to attend a drop-in information session on August 15 from 3:30 – 5:00 at the Editors' Association, 27 Carlton St, 5th floor, Toronto, or contact:

Cultural Careers Council Ontario
27 Carlton Street
Suite 303
Toronto, Ontario
M5B 1L2

Telephone: 416.340.0086
E-mail: info@workinculture.ca



carrie brooks-joiner
& ASSOCIATES
Carrie Brooks-Joiner
cbrooks-joiner@cogeco.ca
905.637.5338

Appendix IV - Application Form



CCCO Peer Learning Circle
Pilot Project
APPLICATION FORM
Application Deadline: August 31, 2007

CONTACT INFORMATION

Name: _____

Job title: _____

Organization: _____

Address of organization: _____
number street unit number

_____ city province postal code

Daytime Phone #: () _____

Fax: () _____ Email: _____

REQUIREMENTS

To be considered for the pilot, each applicant needs to provide:
Application Form Current Resume
Letter of Interest
by mail, fax or e-mail to:
Cultural Careers Council Ontario
27 Carlton Street FAX: 416.340.6276
Suite 303 Email: info@workinculture.ca
Toronto, ON
M5B 1L2

Signature

Date

If selected to participate in the Pilot, I permit my contact information to be shared with other participants of this Pilot. YES NO

Appendix V - Participant Release Form

CCCO Peer Learning Circle Pilot Project

Introduction

Your application to be considered as a participant in the CCCO Peer Learning Circle Pilot Project was successful. The information in this form is provided to provide details on the pilot and the requested commitment from participants so you may assess your willingness and ability to commit to the pilot. If you agree to take part in the pilot project, you will be asked to sign this participant release form. A copy of this form will be given to you.

What is the purpose of this pilot project?

The Peer Learning Circle Pilot Project is a professional development opportunity for Executive Directors of Ontario's arts, culture and heritage service organizations. The pilot is an innovative participatory approach to learning using peer learning circles to support executive directors to address the complex issues they face. The outcome of the pilot will be shared with the broader cultural community.

Why are you being asked to participate?

You are being invited because you are an Executive Director of an Ontario arts, culture or heritage service organization and your experience and profile of your employing institution meet the priorities of the pilot.

How many people will be asked to participate in this pilot project?

Approximately 10 persons will be invited to participate in this pilot project.

What will happen during this pilot project?

The pilot includes an assessment of peer learning circles as a professional development strategy for Executive Directors in arts, culture and heritage service organizations and of the issues facing them. To do this, a Pre- and Post-Survey as well as activities within the peer learning circle process will be used.

The facilitator will work with the peer learning circle on a monthly basis. Peers will meet monthly to identify, discuss, and take action upon issues related to their work as Executive Directors.

CCCO - Peer Learning Circle Pilot Project

Individual participant feedback will be collected through participant responses, facilitator notes, and individual discussions with participants.

How long will I be in this pilot project?

The pilot will run from September 2007 to February 2008. During that time, participants are expected to commit to one 3 hour monthly meeting plus approximately 3 - 6 additional hours each month in preparatory and follow-up activities.

Are there any risks to me?

Within the context of the conversations within the circle, your comments will be subject to assessment by your peers.

Are there any benefits to me?

Participation in peer learning circles may help individuals to:
Build a peer-based network with diverse perspectives and experience

Identify workplace issues and action-based responses in a collaborative and confidential environment

Increase your capacity for enhanced problem solving and critical thinking skills leading to increased capacity for your organization

Will there be any costs to me?

This pilot is subsidized by the Ontario Ministry of Training, Colleges and Universities and is offered for a fee of \$50 for five facilitated sessions. The estimated value of the program is \$500 per participant. The fee and this participant release form are due on acceptance of participation in the pilot.

Will the information that is obtained from me be kept confidential?

Other than the other pilot participants, the only persons related to the Pilot who will be informed that you participated in this pilot project will be the research team members: Carrie Brooks-Joiner and Christine Castle; and CCCO staff: Susan Cohen, Karen Ennis, and Bob Johnston.

You will not be identified by name in any reports or publications resulting from the pilot. Participants will be identified by the type of employing institution: for example, “the pilot included Executive Directors from a small theatre service organization; a mid sized heritage service organization; and”.

You are asked to respect the confidentiality of others within the circle and the information shared within it.

CCCO - Peer Learning Circle Pilot Project

May I change my mind about participating?

Your participation in this pilot project is voluntary. You may decide not to participate or to withdraw from the pilot project at any time. Your refusing to participate or your withdrawal of participation will have no effect on your status with Cultural Careers Council Ontario.

Whom can I contact for additional information?

You can obtain further information about the pilot or voice concerns or complaints by contacting the Project Facilitator, Carrie Brooks-Joiner, at cbrooks-joiner@cogeco.ca or 905-637-5338.

Your signature

By signing this form, I affirm that I have read the information contained in the form, that the pilot project has been explained to me, that my questions have been answered and that I agree to take part in this Pilot project. I do not give up any of my legal rights by signing this form.

Participant's Name (Printed)

Participant's Signature

Date

Statement by person obtaining consent

I certify that I have explained the pilot project to the person who has agreed to participate, and that he or she has been informed of the purpose, procedures, fee, and the possible risks and potential benefits associated with participation in this pilot project.

Name (Printed) - On behalf of CCCO pilot project

Signature - On behalf of CCCO pilot project

Date

Appendix VI- Recommendations from Circle Participants

The participants of the Peer Learning Circle dedicated time in the last Circle to an open discussion and evaluation of the project and the model. As agreed by the facilitator, their recommendations stand alone within this report.

Participants' recommendations:

Circle Format

- that the Circle duration be a renewable 6 month time frame (e.g, January – June)
- that the Circle meet earlier in the month so December is not “lost”
- that the first Circle be full day or even 2 days
- that each Circle be of longer duration (e.g. full day or ¾ day)
- add focussed discussion on topics defined by the Circle e.g. ethics, board/staff dynamics
- that there is a communal lunch as part of the Circle to increase the social aspect
- that the privacy aspect of the Circle's deliberations be maintained
- increase the communication between participants between circles

Circle Composition

- that the target group continue to be mid-senior career cultural workers
- retain the commonality of type of organization e.g. service organizations
- that arts and heritage organizations not be mixed
- that a gender balance is desirable
- that a geographic mix is desirable

Facilitation

- that the group not be self-facilitated and that an outside facilitator be used

Circle Support

- that there be travel subsidies
- info sessions, if held again, be held throughout Ontario or webcast
- reinforce the total time commitment to potential participants

Appendix VII - Highlights of Survey - Participants' Employment Arrangements

(based on 8 participant replies)

- Compensation range was \$30-\$70,000
- 37.5% felt adequately compensated, 25% felt compensation was inadequate and 37.5% did not know if their compensation level was adequate
- The employers' expectation was a work week of 35-40 hours. The actual hours worked were as high as 60 hours per week
- 25% had no health or other benefits. Paid vacation ranged from none to 4 weeks. Only 2 EDs had a comprehensive benefit package.
- 100% reported having the ability to use "flex time" and 50% had a work from home option. 75% had access to an employer provided lap top. None had a cell phone or vehicle provided.
- 42.9% reported that their annual compensation determined for the past year as part of their performance evaluation. 14.3% reported cost of living adjustment and 14.3 % reported that adjustment level was at the "whim of the board". 42.9% reported that there was no salary adjustment in the last year.
- 87.5% report have an university undergraduate or post graduate degree
- 62.5 % report planning to stay in their current position for 2-5 years. Only 14.3% report planning to stay more than 5 years.
- 87.5% report have satisfactory or very satisfactory overall job satisfaction
- 25% report unsatisfactory overall career satisfaction, 50% satisfactory and 25% very satisfactory overall career satisfaction
- 100% report satisfactory or very satisfactory relationship with staff
- 100% report satisfactory or very satisfactory relationship with the board
- 100% report satisfactory or very satisfactory recognition by employer
- 62% report very satisfactory relationship with volunteers
- 50% report satisfactory life/work balance