# The Pittsburgh Learning Circles Program

Community Engagement Fosters a Culture of Continuous Improvement





This document, developed collaboratively by the Leap of Reason Ambassadors Community (LAC), is licensed under a <u>Creative Commons Attribution</u>-<u>NoDerivatives 4.0 International License</u>. We encourage and grant permission for the distribution and reproduction of copies of this material in its entirety (with

original attribution). Please refer to the Creative Commons link for license terms for <u>unmodified</u> use of LAC documents.

Because we recognize, however that certain situations call for <u>modified</u> uses (<u>adaptations or derivatives</u>), we offer permissions beyond the scope of this license (the "CC Plus Permissions"). The CC Plus Permissions are defined as follows:

You may adapt or make derivatives (e.g., remixes, excerpts, or translations) of this document, so long as they do not, in the reasonable discretion of the Leap of Reason Ambassadors Community, **alter or misconstrue the document's meaning or intent. The adapted or derivative work is to be licensed under a** <u>Creative Commons Attribution-NoDerivatives 4.0 International License</u>, conveyed at no cost (or the cost of reproduction,) and used in a manner consistent with the purpose of the Leap of Reason Ambassadors Community, with the integrity and quality of the original material to be maintained, and its use to not adversely reflect on the reputation of the Leap of Reason Ambassadors Community.

Attribution is to be in the following formats:

- For <u>unmodified</u> use of this document, the attribution information already contained in the document is to be maintained intact.
- For <u>adaptations or derivatives</u> of this document, attribution should be prominently displayed and should substantially follow this format:

The above is consistent with Creative Commons License restrictions that require "appropriate credit" be required and the "name of the creator and attribution parties, a copyright notice, a license notice, a disclaimer notice and a link to the original material" be included.

"From 'The Pittsburgh Learning Circles Program: Community Engagement Fosters Culture of Continuous Improvement,' developed collaboratively by the Leap of Reason Ambassadors

Community, licensed under CC BY ND <u>https://creativecommons.org/licenses/by-nd/4.o/</u>"

For more information or to view the original product, visit <u>http://leapambassadors.org/resources/</u> pittsburgh-learning-circles

The Leap of Reason Ambassadors Community may revoke the additional permissions described above at any time. For questions about copyright issues or special requests for use beyond the scope of this license, please email us at info@leapambassadors.org.

#### leapambassadors.org

### **Foreword: Igniting Change**

*"The ultimate goal is to create social impact that changes people's lives. The Pittsburgh Learning Circles model is a paradigm shift. We're moving from transactional to transformational leadership."* 

--Fred Brown, President, The Forbes Funds

Dear Changemakers,

As Pittsburgh grapples with the challenges of a 21st century economy, its rapid transformation from a "rust belt" to a "brain belt" has enabled new business opportunities for the region.

At the same time, the nonprofit sector has experienced even greater stress during this period of rapid change. In this new era, skilling up resilient populations will require nonprofits to move quickly and build capacity to effectively respond. Toward that end, the Pittsburgh Learning Circles program was developed to focus on helping nonprofit leaders continuously improve for those they serve.

This year-long, community-wide initiative is a powerful way to help nonprofits navigate the sea change happening in our region. It aligns multiple stakeholders nonprofit leaders, progressive funders, policymakers, and change agents—with a strategic approach to build a community of practice that is transparent, inclusive, measurable, and accountable.

Simply put, the Pittsburgh Learning Circles program enables nonprofits to become more agile, learn new practices for continuous improvement, and promote collective genius.

In the long term, we hope to inspire and support more and more local nonprofits to embark on the same journey, ultimately creating a stronger and more effective nonprofit sector in the Pittsburgh area.

Sincerely,

Fred Brown, President The Forbes Funds

## **Participants**

Nonprofit organizations with leaders engaged in the learning circles































## **Mentors**

Organizations with leaders providing peer coaching and support to participants



## **Funders**







Center Corporation









Funding organizations that provided support for the learning circles





## **Executive Summary**

The Pittsburgh Learning Circles program, an initiative of <u>The Forbes Funds</u>, engages community nonprofit leaders tackling the challenge of organizational performance in a bold new way. The one-year program pilot brought together 26 nonprofit leaders to guide them through a structured approach to reflect, discuss, and continuously improve their organizations.

The goal of the program was to build and share knowledge through open dialogue and deep reflection around issues or problems—with a sharp focus on helping organizations discover and act on ways to improve. The learning circles coalesced cohorts of leaders into highly interactive groups that met regularly to focus on select organizational disciplines, such as leadership, program management, or financial health.

Cohort participants used their organizations' data and results of comprehensive surveys to delve into issues and discover the most important and relevant areas for their own continuous-improvement efforts.

The Pittsburgh Learning Circles program was designed to help participants make effective use of two aligned resources developed by the <u>Leap Ambassadors Community</u>, a cross section of leaders focused on helping nonprofits make the leap from good to great:

- The <u>Performance Imperative</u> provides a definition of a high-performance organization and a framework of seven organizational disciplines and their underlying principles to explain what it takes to achieve high performance.
- The <u>Performance Practice</u> provides a series of concrete behaviors and specific practices that allow for reflecting on an organization's behaviors and learning from those of the highest performers as the basis for an extensive, in-depth look into the organization and a broad lens to identify areas for improvement.

The team that supports the Leap Ambassadors Community joined The Forbes Fund and program participants in the Pittsburgh Learning Circles to help them apply The Performance Practice and its structured approach to continuous improvement.



"We are using the learningcircles model to generate performance excellence for nonprofits in the Allegheny County region. With a focus on cohort interaction and shared outcomes, everyone brings something to the table and takes more away."

> --Don Goughler, Executive-in-Residence, The Forbes Funds

## **Building Forward Thrust**

From its inception, The Forbes Funds has been dedicated to making Pittsburgh's nonprofit sector more innovative, informed, engaged, and effective. It was founded during the turbulent early 1980s when many nonprofits struggled to survive amid significant changes in federal and state funding priorities.

At that time, its charter was primarily to provide emergency financial assistance and management consultation. Its commitment to building nonprofit strength continued through the 1990s, when The Forbes Funds' mission evolved to improving infrastructure, long-range planning, and strategic management.

#### What Does It Take to Succeed?

- People who believe in the power of the region's nonprofit community and who recognize that performance matters
- Deep community engagement to coalesce the region's stakeholders behind the drive to improve organizational excellence
- An anchor institution in the region, like The Forbes Funds, with the credibility, capacity, infrastructure, and good relationships in the nonprofit world
- A network of practitioners and advocates who support the hard work of innovation in a region's nonprofit sector
- A common definition of and framework for high performance.

Today, The Forbes Funds remains squarely focused on strengthening the management capacity and impact of community nonprofits—both individually and collectively—in Allegheny County. As a supporting organization to <u>The Pittsburgh Foundation</u>, The Forbes Funds' overarching mission is to encourage and support community-based organizations to strengthen organizational muscle to increase their social impact.

In recent years, The Forbes Funds has worked to accomplish that mission by delivering resources and programs to help leaders drive continuous improvement to build strong, high-performing nonprofit organizations throughout the region. Through one-to-one coaching and its Executive-in-Residence Program, it has endeavored to guide nonprofits through disruptive events, reframe thinking, build new strategies, and prepare for the future.

In 2017, in the face of seismic change and unprecedented disruption for the nonprofit sector, The Forbes Funds recognized that "solving the greatest challenges faced by our communities and our world will take a bold new approach to collaboration and continuous improvement."

And so, the Pittsburgh Learning Circles program was born.

## What Is the Pittsburgh Learning Circles Program?

The Forbes Funds launched the year-long program pilot to engage community nonprofit leaders who strive to improve organizational performance. A learning circle is a highly interactive, participatory structure for organizing group work and engaging in peer learning.

According to The Forbes Funds President **Fred Brown**, the overarching goal is improved performance for the entire nonprofit sector in Allegheny County. "For us to achieve greatness, we have to move from good to great," he said. "We must have a shared vision, so we're all rowing in the same direction with the same intent. The Pittsburgh Learning Circles program is a key pathway to help build great organizations."

Based on the initial success of the program pilot, the Forbes Funds plans to extend the program as an ongoing initiative. They will benefit from the focused approach provided by the Performance Imperative and the Performance Practice to help organizations discover and act on ways to improve as the basis for future learning circles, including additional focus on self-assessment, continuous improvement, and evaluation.

## **Galvanizing the Region**

Running from January to December 2018, the program pilot included Pittsburgh nonprofits committed to accelerating their progress toward high performance—all supported by community leaders in the nonprofit sector.

The Pittsburgh Learning Circles program pilot galvanized key stakeholders throughout the region to progress toward becoming high-performing organizations and boost the social impact of nonprofits.

"From the outset, we brought together an incredible cadre of nonprofit community leaders to brainstorm ideas that would lead to that improvement across the region. As a result, we came up with an approach that leverages the strengths of all of the providers in the community," Forbes Executive-in-Residence **Don Goughler** said.

He added, "Too often, we think that expertise lies outside our communities. We don't always consider how much expertise lies within our communities or make a concerted effort to bring it out. Recognizing your own strengths is vitally important to the success of a regional initiative like this one."

#### Who Is Involved?

**The Forbes Funds invited nonprofit organizations in Pittsburgh and surrounding communities across Allegheny County to participate**. Through personal outreach and broad communications, the organization offered nonprofits of every size and type the opportunity to participate in the inaugural Pittsburgh Learning Circles program.

To maximize success, The Forbes Funds recruited experienced nonprofit leaders and educators to serve as mentors for each learning circle. Mentors facilitated group learning through peer coaching and interactive support. They also helped learning-circle participants understand the Performance Imperative framework and use the deeper content of the Performance Practice to learn, reflect, and improve their organizations' performance.



*Pittsburgh Learning Circles mentors with Don Goughler (far right), Executive-in-Residence at The Forbes Funds.* 

#### **Key Stakeholders**

- Nonprofits throughout Allegheny County
- · Mentors to facilitate the learning circles
- Coaches to provide individual coaching
- Regional foundations or other advocates to provide funding support

**The Forbes Funds leaders also tapped the expert coaching skills of its Executives-in-Residence Program.** Executive coaches provided supplemental individual coaching sessions to each of the nonprofit organizations that participated in the learning circles.

A network of foundations throughout the region were instrumental to the project's success—both in terms of providing funding support as well as strategic guidance. The Grable Foundation, Richard King Mellon Foundation, and Fine Foundation are strong partners in the Pittsburgh Learning Circles program and provided funding to support the program pilot.

"Ultimately, the goal of The Forbes Funds is to help nonprofits continue to do what they do—and do it better," said **Gregg Behr**, Executive Director of The Grable Foundation and former President of The Forbes Funds. "For decades, Forbes has supported nonprofit management, leadership development, and performance improvement for social service agencies in the Pittsburgh region. The Pittsburgh Learning Circles program is the next advancement in that mission."

## **Boosting the Impact**

In the last 40 years, Pittsburgh has emerged from the depths of its industrial, steelmaking past to become a globally recognized "techs, eds, and meds" leader and an emerging center for robotics and AI.

"As the private sector transitioned from its manufacturing past, it's not equally evident that the nonprofit sector has kept pace with the trajectory of the region," Brown said. "Many of our nonprofits have existed for more than 100 years, and they still have the same mission and practices that carried us through our industrial past. A century later, Pittsburgh has changed dramatically, but the nonprofit sector hasn't had the same continuity in its evolution. That has to change."

#### What's Different About This Approach?

To effect such a change, The Forbes Funds evaluated other leadership and organizational-development programs and determined the Pittsburgh Learning Circles was the best way to drive a real performance difference.

"We believe this program will boost the impact that nonprofits are making in Allegheny County," Goughler said. "It is a key pathway to more effective, efficient, equitable, and sustainable solutions for the communities we serve."

Unlike other programs, the Pittsburgh Learning Circles focuses on active engagement with peers in a community of learners who are collectively striving to continuously improve for those they serve.

#### **MENTOR Point of View**

At the end of the day, people will look back and talk about this experience in a different way. What do we want to change? What do we see as a key area for growth? Participants are figuring out how to translate this learning experience into real action. We're helping nonprofits become stronger. And the stronger the sector is, the better for all of us in our community.

--Dave Coplan, Executive Director, The Human Services Center

## FAST FACTS

#### What's a Learning Circle?

A learning circle is a highly interactive, participatory structure for organizing group work and engaging in peer learning. The goal is to build and share knowledge through open dialogue and deep reflection around issues or problems with a focus on a shared outcome—in this case, improved performance for the nonprofit sector in Allegheny County.

#### What's the Performance Imperative?

**The Performance Imperative** helps nonprofits and public agencies (and their stakeholders) understand and assess performance by **defining** high performance and providing a **framework** of seven organizational disciplines it takes to achieve it:

- Courageous, adaptive executive and board leadership (the preeminent discipline)
- Disciplined, people-focused management
- Well-designed and well-implemented programs and strategies
- Financial health and sustainability
- A culture that values learning
- Internal monitoring for continuous improvement
- External evaluation for mission effectiveness

To make these seven organizational disciplines actionable and not just aspirational, Leap Ambassadors flesh them out with principles, or tenets, that underlie and support each discipline.

#### What's The Performance Practice?

**The Performance Practice** helps organizations delve deeper into the Performance Imperative and use it as the basis for ongoing reflection, learning, and continuous improvement. It helps organizations strive to be better for the people or causes they serve by providing:

- A series of concrete practices that the highest-performing organizations have used to help them go from good to great. Leaders can use these practices to take an in-depth look at their organizations and zero in on the most important and relevant areas for continuous improvement.
- A modular structure that provides different paths into organizational improvement with proof points organized and presented for each of the framework's seven organizational disciplines. Leaders can select one or several modules at a time and work through them in their own way and at their own pace.

#### What's the Leap Ambassadors Community?

The Leap of Reason Ambassadors Community is a private community of nonprofit thought leaders, leader practitioners, forward-looking funders, policymakers, and instigators who believe that mission and performance are inextricably linked. Each ambassador brings depth of knowledge and experience, passion for inspiring others, and a commitment to increasing the expectation and adoption of high performance in the field. Its audacious vision is to trigger a vital core of the social sector to embrace the importance of high performance.

"This initiative will create a deep bench of leaders to guide the Pittsburgh community in creating meaningful, lasting impact," Goughler said. "Having a focused period of collaborative, peer-topeer mentoring galvanizes the region and different sectors in a way that promotes strategic growth."

Brown emphasized that the initiative stands apart from traditional leadership programs. "There's a recognition that performance matters and a focus on the intentional development of metrics," he said.

"It serves as a North Star that will frame new opportunities for the region," he added. "In this way, we hope to enhance the region's collective capacity and enable measurable outcomes. We are building on the good work already underway in the region and exploring how this approach can be a catalyst for action that will complement Pittsburgh's rapid change and growth."



Fred Brown, President of The Forbes Funds

Mentors and program participants also believe that the Pittsburgh Learning Circles program is a different approach to strengthening the performance of the region's nonprofit sector. According to **Susanne Cole**, President and CEO of <u>Pressley Ridge</u> and one of the four mentors for the program, "In a learning circle, you're both a giver and a taker. You give your expertise, time, and lessons that you've learned. And you take in information and suggestions from other people. Everybody can learn from one another. It doesn't matter if you are a small or large organization. It gives you the opportunity to focus and think big picture and aspire to go somewhere."

**Steve Davis**, a Forbes Funds Executive-in-Residence, human resources consultant, and a participant in one of the learning circles, added, "What makes this program unique is the different perspectives and experiences everyone brings to the topics we cover each session. At every session, I looked forward to learning and growing—along with discovering one or two new models that I may want to use in the future. So, it's the shared learning experience that sets this program apart."

#### **Shifting the Paradigm**

The program pilot organized leaders into highly interactive groups to focus on select disciplines, for example leadership or financial health. According to Brown, "The ultimate goal is to create social impact that changes people's lives. The Pittsburgh Learning Circles model is a paradigm shift—we're moving from transactional to transformational leadership."

#### Pittsburgh Learning Circles Program: Pilot Goals

- Strengthen strategic focus and build management practice skills
- Activate engagement with peers in a community of learners
- Provide access to a framework that provides path to follow for organizational improvement
- Demonstrate a scalable model to drive
  organizational improvement at the community level

#### **PARTICIPANT** Point of View

I like the diversity of the participants. Being able to learn from different people with different perspectives from different organizations. ...we don't have many common denominators; yet we all have the same challenges and goals and dreams. On the surface it doesn't look like it would work, but it does. And it makes everybody stronger.

#### -Carla Conrad, Executive Director, Breathe Pennsylvania

Making that leap requires a dedication to continuous improvement. The Pittsburgh Learning Circles program provides nonprofit leaders an opportunity to strengthen their strategic focus and foster a culture of continuous improvement.

Regardless of budget size or field, community-based nonprofits participating in the Pittsburgh Learning Circles program pilot had a unique opportunity to gain clarity about their aspirations for organizational improvement in a specific area, develop metrics to gauge their progress, and document meaningful, measurable improvement over the course of the one-year program.

"We are building the next generation of leaders in the Pittsburgh nonprofit community," Goughler underscored. "The participants established strong, vibrant relationships and created collaborative approaches to improving and getting stronger as organizations. They built bench strength and depth. Not only did executive directors form relationships with other executive directors, but the next-level group of staff also collaborated and learned skills that will enable them to be future leaders."

#### The Power of Collaboration

"

In Allegheny County, which has a population of about 1.2 million people, there are more than 2,000 nonprofits outside of hospitals and educational institutions. "We believe the system can be stronger and the funding more effective if there is more strategic collaboration," Brown said.

He added, "Peer strength across systems can lead to collaborative activities, including focused affiliations, partnerships, and possibly even mergers and consolidations. Imagine two or three agencies, each with different strengths, getting together to tackle an initiative that is bigger than any one of them could tackle alone. With the Pittsburgh Learning Circles, we're building relationships that can help agencies prosper in the future."

Cole said, "It's a great way to break down silos across systems. When you bring together a diverse group of people, you learn more about the resources that are available in the community and how you can partner with one another to make a greater impact on your community."

**Carla Conrad**, Executive Director of <u>Breathe Pennsylvania</u> and a learning-circles participant, said that her organization needed to learn how to run more effectively because resources are limited. "In Allegheny County, we have many people doing the same types of things, and funding is limited across the board," she noted. "You're not maximizing your reach when you're not running efficiently. In the learning circles, we focused on critically analyzing how we approach problems—making sure that we work on finding better ways to perform and achieve our intended outcomes."

Collaboration is also imperative between funders and their grantees. Brown said, "The essence of a paradigm shift requires fervent partners committed to systemic change. The benefit of a strong funder-nonprofit partnership ensures both the investor and the practitioner share a common understanding of the challenges and opportunities in real time. When both are communicating clearly—and risks and opportunities are shaped collectively—the effort produces a better product. Having the ability to perform course corrections more readily increases agile decision making, ultimately increasing efficiency and effectiveness."

Behr, a key funder of the program, agreed. "I believe deeply that, as funders, we achieve results only to the extent that the organizations we're honored and privileged to support achieve meaningful results. The Pittsburgh Learning Circles program allows us to promulgate the mantra that performance matters for all of us."

### **Driving Higher Performance**

The Pittsburgh Learning Circles program pilot convened three learning circles focused on specific organizational disciplines—management, programs, and financial health (see sidebar).

Each of the three learning circles had eight to ten participants who:

- Participated in regular meetings with other leaders working on the same discipline
- Used the Performance Practice's structured approach to collect participant views, issues, and suggestions to identify specific areas or opportunities for improvement to address
- Identified and pursued a clear outcome or initiative within that organizational discipline

In addition to individual cohort meetings, the full group of participants, mentors, and coaches met regularly for organizational development and skill-building workshops.

#### The Seven Disciplines of High Performance

The Leap Ambassadors Community defines high performance as "the ability to deliver—over a prolonged period of time—meaningful, measurable, and financially sustainable results for the people or causes the organization is in existence to serve."

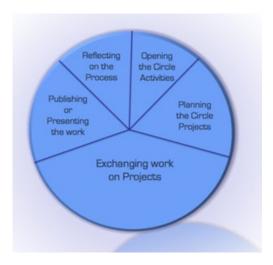
Organizations that commit to pursuing high performance generally make the most progress by cultivating seven core disciplines, as identified in the Performance Imperative:

- 1. Courageous, adaptive executive and board leadership (the preeminent pillar)
- 2. Disciplined, people-focused management
- 3. Well-designed and well-implemented programs and strategies
- 4. Financial health and sustainability
- 5. A culture that values learning
- 6. Internal monitoring for continuous improvement
- 7. External evaluation for mission effectiveness

"This program gave me an opportunity to take an objective look at the organization and see it differently than I did before," Davis noted.

Conrad emphasized that the program helps participants make a mental shift toward continuous improvement. "Every time we met, I thought about things a little differently," she said. "It was such a growth experience. After the last large-group meeting, it was evident that we have many logic models, but we don't have an overarching theory of change for our organization. My project was to create one and bring our board and the staff together on the same page. We need to make sure we can say at the macro level, 'This is what we do as an organization, and here's how we do it."

#### **Mentored Cohort-Learning Project Design**



As with most challenging work, there is power in learning from others when undertaking organizational improvement. With that in mind, the Pittsburgh Learning Circles program includes components of both peer learning and executive coaching.

Peers support each other as they learn how to become stronger and more effective nonprofit leaders. In the program pilot, each circle was guided by a seasoned and accomplished mentor who facilitated a monthly peer learning circle of leaders.

Each participant was also paired with a Forbes Executive-in-Residence to provide support throughout the program year. These coaches were available to help participants develop and implement action plans for the work they wanted to accomplish over the course of the year.

#### **Building Trust**

"Trust is at the center of cohort learning," Goughler emphasized. "Undertaking the difficult work of selfreflection and continuous improvement is challenging. And taking the time to get it right is an important investment."

Brown said, "The learning circles provide a safe place for people to share challenges and opportunities within the system. As a leader, it's difficult to pivot when discussing things at a theoretical level."

He added, "It's much easier with people who have had similar experiences or have been in your seat and are now further along the continuum. The conversations are far richer. There is a greater understanding of the climate and needs of nonprofits when you're speaking with others who have been there before. Simply put, the learning circle environment creates trust at a much more expedient level."

Cole agreed. "The learning circle brought together a group of leaders to share issues and experiences in order to learn, grow, and develop," she said. "It was a trusted place to be vulnerable, share challenges and questions, bounce ideas off of people who are in the same position, and facilitate future learning. It was an opportunity to get out of the day-to-day in your organization and spend time focusing on strategic direction with other leaders."





Along with trust, true collaboration is only possible when time and effort are expended to build strong, meaningful relationships. This is often the most underappreciated aspect of collaborative efforts.

#### **Program Costs**

Through the generous support of The Forbes Funds and foundation partners in Pittsburgh, the program pilot was offered at no cost to program participants. Initial funding for the program pilot was provided by The Grable Foundation, Richard King Mellon Foundation, and the Fine Foundation, strong supporters of the critical goal of funding organizational improvement and true partners in boosting the overall performance of the nonprofit sector in the region.

In addition, the resources of the Leap Ambassadors Community—including the Performance Imperative and the Performance Practice—were available at no cost to the participating nonprofits, funders, and change agents. These resources are always complimentary and can be found at <u>www.leapambassadors.org</u>.

"The budget was modest for what we're doing. We spent well under \$100,000 to work for an entire year with 26 nonprofit professionals from 16 agencies in the Allegheny County community," Goughler noted. "Simply put, the benefits far outweighed the costs, because we have been able to improve the capacity of organizations that are serving tens of thousands of people in our community. That's a big impact for a small investment."

## **Sparking Positive Change**

As the first step on the journey to continuous improvement, participants used the Performance Practice to conduct an organizational self-assessment to determine where they were at the outset of the program and to reflect on and discover opportunities to innovate and improve. In a survey at the conclusion of the program pilot, virtually every participant stated that the opportunity for peer learning was invaluable.

"Einstein said you can't solve a problem with the same energy that created it," Brown said. "The Performance Practice's structured approach and intellectual rigor offers a way for us to vibrate at a different frequency, so we begin to see resolutions through a different lens that we could not have seen as an individual group or institution."

Goughler stressed that use of the Performance Practice helped participants understand where their organizations were and where they want to go. "It is a tool that can help you identify your strengths and the changes you want to make in your organization," he said.

"Over the years, The Forbes Funds has used other assessment tools, but they were too complex and not focused on what we wanted to do with the learning circles," Goughler explained. "Our goal was to create common knowledge and look at common aspects of the organizations."

He added, "The Performance Practice is more than an end in itself; it's a resource that can help us achieve this new structure. It is clear, it has universal coverage, and it can be completed quickly. Other assessments are challenging due to the amount of time and effort agencies have to put into it, and they just don't take the time. The Performance Practice is practical and its modular design makes it easy to use."

**Dave Coplan**, Executive Director of <u>The Human Services Center</u> and a program mentor, added, "When used together, the Performance Imperative and the Performance Practice provide a different lens to look at opportunities to change. There's something in each of the organizational disciplines where someone will be able to make a difference for their agency. They're going to choose the change that matters to them."

He noted, "The Performance Practice is helping us evolve and get to a new place with a different way of discussing continuous improvement. Opening up new pathways, new thought processes is critically important. The self-assessment helped us to think differently, in an outside-in view. It is an objective view. The questions helped me step back and say, 'This isn't about you. This is about real impact.' And I was able to answer those questions objectively based on feedback."

Cole mentioned that using the Performance Practice provided participants with a way to start the discussion around where they are performing well and where they need to improve. "It helps leaders implement a framework for continuous improvement and a pathway for better performance," she remarked. "It's more user friendly and resource-rich than anything else I've used. And it comes from top leaders in the field who understand the nonprofit environment and what it takes to be successful."

## **Designing the Future**

The Forbes Funds believes that participation in the learning circles will pay dividends for decades to come. The ongoing process of assessment, reflection, and learning will create a continuous cycle of improvement among the organizations immediately involved, and it will create a ripple effect throughout the community far into the future.

#### Actionable Steps for Any Community

Here are Brown's lessons for other communities considering the learning-circle model:

- Establish a North Star, like the Performance Imperative and the Performance Practice, that everybody sees as bigger than any one institution.
- Have courageous conversations within the sector and begin to build a sense of trust and relationship with people so that we can be honest and transparent, inclusive and accountable.
- Use a continuous improvement framework to encourage a standard definition of high performance and the organizational disciplines it takes to achieve it.
- Forge a strong partnership with regional foundation partners, like The Grable Foundation, Richard King Mellon Foundation, and Fine Foundation in Pittsburgh, that support the critical goal of funding performance and who provided the initiative with financial support.

"We are using the learning-circles model to generate performance improvement for nonprofits in the Allegheny County region. With a focus on cohort interaction and shared outcomes, everyone brings something to the table and takes more away," Goughler said.

Now that the Pittsburgh Learning Circles program pilot is complete, The Forbes Funds intends to extend the Pittsburgh Learning Circles program and gather more agencies into this process over the next few years. Goughler said, "We are actively evaluating using the Performance Practice as a grantmaking resource to identify areas of need among agencies that apply for funding from The Forbes Funds. We are also planning to develop additional cohorts among community nonprofits to address several organizational disciplines of the Performance Practice."

Funders like The Grable Foundation are also committed to expanding the program's reach. "As a funder, our goal is to support the Pittsburgh Learning Circles 2.0," Behr said. "The program pilot allowed us to broadly introduce and promulgate the idea of continuous improvement to an initial group of leaders. Now, we want to get even broader recognition and seed this innovative approach throughout the nonprofit sector."

Looking to the future, Brown said, "The greatest outcome of the Pittsburgh Learning Circles has been the development of organic, peer-to-peer learning focused on driving our nonprofit sector toward higher performance. The value will be iterative and self-sustaining and catalytic, because participants quickly realize that coming together with a goal and framework to improve organizational performance will directly impact their ability to create meaningful, measurable change for our region."

### **Propelling Change in Your Region**

If you're interested in exploring how to implement an initiative like the Pittsburgh Learning Circles Program in your area, please contact:

The Forbes Funds: Don Goughler, goughler@forbesfunds.org

Leap Ambassadors Community: Linda Johanek, ljohanek@morino.com

We're gathering feedback from nonprofit professionals to make sure our resources deliver on what matters most to you. Please take a minute to share your thoughts on the Pittsburgh Learning Circles story by taking our three-question survey: https://www.surveygizmo.com/s3/4865133/Feedback-on-Pittsburgh-Learning-Circles-story

Thank you in advance for your feedback!