



Initial Findings Report

# Center for Creative Leadership Focus Group Research Initial Observations and Analysis

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By Nancie Zane, Ph.D., Principal  
Linshuang Lu, Consultant  
Praxis Consulting Group, Inc.



## Center for Creative Leadership

# Focus Group Research Initial Observations and Analysis

### Introductions

To better understand the factors that influence emerging leaders to engage in and commit to nonprofit work, Praxis Consulting Group working in affiliation with the University of Pennsylvania and the Center for Creative Leadership conducted 3 narrative-based research groups between March and April, 2011.<sup>1</sup> We invited students from both the Wharton School and the Nonprofit Leadership Masters Programs as well as leaders from the nonprofit community in Philadelphia to share their experiences and expectations as emerging leaders about mission driven/high impact work.<sup>2</sup> Issues related to job motivation and retention; skill utilization and development; and organizational structure and culture were explored.<sup>3</sup>

The sections below include a brief description of methods as well as the summaries from each of the groups. The final section identifies over-arching themes and observations.

### Methods

Praxis designed and facilitated three groups based on appreciative inquiry methods, an approach developed by David Cooperrider and others at Case Western Reserve (1995)<sup>4</sup>.

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<sup>1</sup> Our data represents one of several data sets being collected and/or utilized in the context of a research report on emerging leaders being sponsored by American Express and directed by the Center for Creative Leadership. The researchers include the conveners/researchers from CCL, Dr. Kelly Hannum, Dr. Jennifer Deal, and Dr. Marian Ruderman; and Dr. Liz Livingston Howard from the Kellogg School of Management at Northwestern. The report will be released in late fall/winter of 2011.

<sup>2</sup> Special thanks to colleagues Jeff Klein, Director at the Wharton Graduate Leadership Program and Kate Kimmel, Senior Associate Director at WGLP, for their generosity in working with us and enabling us to meet with their students in the context of their Board Leadership program. Thanks to Chris Angelucci and Dr. Alan Barstow from the Organizational Dynamics Department for providing meeting space and supporting this research. We also want to acknowledge Dr. Nancy Aronson for her collaboration on the inter-generational community leaders' guide, and Umi Howard, Director of the Lipman Family Prize at WGLP, for his initial consultation as we framed the research.

<sup>3</sup> Framing questions: Motivation and retention - what compels emerging leaders to work and or continue working in nonprofits as paid staff or volunteers?; Skill utilization and development - what skills, knowledge, and experiences do emerging leaders bring to their work and what competencies do they hope to develop?; and Structure and culture - what kinds of structures, relationships, and cultural norms matter for on-going engagement and commitment to mission driven/social impact work?.

<sup>4</sup> Appreciative Inquiry is an interview-based data collection and systems-change process which enables individuals, groups, and systems to find individual and collective meaning through storytelling and facilitated interpretation as well as envisioning future directions through a "success-

- We developed interview protocols (see attached) based on the thematic areas determined through discussions with our CCL project partners.
- In the context of an introductory framework, participants were provided with instructions about how to conduct interviews with their peers while taking notes.
- Participants were given 30 - 40 minutes to engage in paired-interviews and then asked to fill out a “summary sheet” to highlight the critical aspects of their interviews. They were also engaged in a thematic “sense-making” discussion which took place between 30 and 60 minutes in the full group which was taped.
- After the sessions, the interview notes and the summary sheets were typed up as were any notes taken by facilitators. These findings reflect interview and summary notes written by the participants, transcripts of the discussions as well as our discussion notes.

The 3 groups included 38 participants and were held at the University of Pennsylvania (U. of P.). Participants included:

- Group One: the Wharton Leadership Program (WLP), the Wharton School, U. of P. 17 participants (~24 – 33 years old; 10 women and 7 men); students had been involved as volunteers with nonprofit-board placements throughout the 2<sup>nd</sup> year of their MBA’s at the U. of P.. Our meeting signified the end of their official nonprofit board commitments.
- Group Two: the Nonprofit Leadership Program (NLP), School of Social Policy, U. of P. 9 participants<sup>5</sup> (~24 – 30 years old; 7 women and 2 men); students all had backgrounds in some form of nonprofit work and had done nonprofit internships during the year. Our meeting signified the end of their academic year in the program and they were seeking or had secured nonprofit work for the coming year.
- Group Three: Multi-generational Nonprofit Community Leaders; range of Philadelphia-based nonprofits 13 participants (~24 - 60 years old; 12 women and 1 man); we had invited nonprofit leaders from across the age spectrum in an effort to test ideas about what was similar and unique to different generations about engaging in mission-driven, non-profit work. We used the following definitions Millennials (born after 1980); Gen Y (born between 1965 – 1979), and Baby Boomers (born before 1964). According to these definitions, 5 Millennials, 6 Gen X’ers and 2 Baby Boomers participated.

Protocols for each group are attached.

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oriented” social-constructivist lens; Cooperrider D. (1995) An Introduction to Appreciative Inquiry. *Organizational Development*, 5<sup>th</sup> ed. New York: Prentice Hall

<sup>5</sup> Six people participated in interviews at the designated time, including one of the facilitators to create even pairs; since she is an emerging leader we included her data; one additional person showed up later and agreed to fill out his interview protocol; Two other students were not able to be present but filled out their interview form later

## Summary Findings: Wharton Board Leadership Program

### **Motivations for Social Impact/Mission Driven Work**

When the Wharton Board Leadership Program (WLP) students were asked about what drew them to mission-driven/social impact work they responded that they wanted to help others, drive positive change, and improve lives by enabling people to reach their full potential. They also liked making a commitment to an organization and making connections to the local community.

The students reported being interested in a wide variety of causes, ranging from helping the most needy (e.g. homeless, people without food and electricity), to education, to capacity-building (e.g. “teaching people how to fish”), to advocacy work (e.g. LGBT rights). Some students wanted to work at a policy and/or city-wide level (e.g. addressing transportation, reconfiguring the urban environment) in order to alleviate poverty. Several students wanted to do social-impact investing and bring resources to social enterprises. Notably, one student said he wanted to make a difference, but wasn’t sure exactly how or in what area.

Despite diverse interests, nearly all students related that they wanted to see tangible impact in their work, either in terms of outcomes (e.g. providing a summer camp experience to X number of children) or longer-term effect (reducing world hunger)..

### **Skill Utilization and Development**

Given that this study was conducted with a group of Wharton business MBA students, it was not surprising that many related that they had strong analytical skills (e.g. intellectual analysis, business acumen, pragmatic thinking, etc.). Others also reported strengths in marketing and branding, communicating and facilitating conversations, pushing towards action, creativity, strategic thinking, being passionate about the cause, being diplomatic, fundraising, and playing the devil’s advocate during meetings, etc..

Several students struggled with the political aspect of board involvement— they wanted to build more skills in negotiation and facilitation because they discovered that trying to convince people just by illustrating their logical reasoning and showcasing their analytics was not enough to build buy-in and/or commitment. They wanted to get people to buy into their ideas and agenda, i.e. “rally around the cause” and be more “inspirational”. Students also reported wanting to improve their leadership skills in terms of identifying priorities, learning to delegate, and overall organizational management. Several students noted that particular technical competencies—knowing contract law or water sanitation engineering—would be very valuable. Several other students reported that it was challenging to balance between “being in the weeds” and in the details of the service work and thinking strategically for the nonprofit.

Students wanted more opportunities to serve on a board, have managerial responsibilities and/or roles with more responsibilities, and learn from those who are effective leaders to build these skills.

Many students said that they gained a deeper appreciation for the nuances and challenges of the nonprofit sectors. As one student noted that “efficiency-driven models don’t always apply in the nonprofit sector.”

### **Work Expectations and Desired Work Environment**

We also asked Wharton students what their generation (mostly Millennials) expected from work (volunteer or paid) in terms of the rewards they hoped to receive and the characteristics of the organizations for which they might work.

The students reported that they wanted to feel a sense of ownership about what they were doing. They wanted to be able to see the big picture and the impact of the organization, rather than be engaged only at the micro-level. They also believed that ownership should be coupled with accountability to other board members, donors, or other stakeholders in order to remain motivated.

Students also mentioned that their generation recognized the big problems, but were more interested in how to pragmatically solve them rather than focus on politics or ideology. Students also felt a certain skepticism towards nonprofits as a model for solving social problems—they were willing to try other organizational forms to determine if there were more efficient or effective ways to address challenges. Students reported that they did not necessarily feel loyalty to a specific company—they would not stay with a job if there was not a clear way for growth and learning and they wanted to be at a place where their passion for ideas and for the work could be effectively employed.

On the one hand, students expressed a strong need for autonomy and flexibility in their work--- they wanted to be able to work from home, not necessarily 9 to 5, and be trusted to get the work done and meet deadlines. Students noted that technology could play a role in allowing them to have more control over their work schedule.

On the other hand, a number of students also expressed an interest in being an environment that is often associated with a functional meritocratic hierarchy: clarity regarding roles and responsibilities, productive supervision and systemic feedback<sup>6</sup>, and transparency regarding the rewards systems.<sup>7</sup> Consequently they were less wary of hierarchical structures per say as long as the structures incorporated flexibility and responsive professional relationships.

## **Findings: Nonprofit Leadership Program**

### **Motivations**

The Nonprofit Leadership Program (NLP) students valued nonprofit work because they were passionate about the organizational mission and the opportunity to create change. They

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<sup>6</sup> Systemic feedback is ongoing and should be provided regarding their individual performance as well as the impact they and their cohort are having on the organizational mission.

<sup>7</sup> They were looking for the rewards systems in which the path for growth, promotion, and learning is clear and fairly applied.

also were driven by having an impact on other people's lives as well as their own ("this program taught me to see people outside of their typical social classifications"). In addition, some students reported that they "loved" meeting and working with "incredibly talented and committed people".

Many students reported that they were drawn to the sector because of opportunities for creativity, innovation and idea generation for "fixing problems and developing better solutions". A few students reported that they enjoyed the "day-to-day challenges and complexities' of the work" and learning through experience.

### **Skill Utilization and Development**

Students reported possessing a wide variety of skills that they brought to their work. A few people mentioned their passion, diligence, hard-work and self-motivation. Several students reported having well-developed people skills—an ability to listen to, ask questions, understand, collaborate and work effectively with others. They were able to facilitate group decision-making, and listen and ask questions. Other students related skills in big picture administration and critical thinking—asking what the organization is trying to achieve, evaluating opportunities, or listening and defining issues. Other skills mentioned included: resourcefulness, having a thick skin, thinking innovatively and creatively being task-oriented, and having comfort with ambiguity as well as a solid experience in nonprofit and for-profit backgrounds.

NLP students reported a wide diversity of needs for skill development, including: building confidence, improved decision-making both from both a data and people basis, fundraising skills, group dynamics, balancing stakeholder needs, innovative thinking and effective communication across boundaries. Some students mentioned simply wanting more experience.

In order to build these skills, students named the importance of "practice through experience" (taking on special projects; being in a leadership roles; being on boards, etc.) and being able to make mistakes without fear of reprisal..Students also mentioned workshop/training for developing interpersonal skills, learning statistics for program evaluation work, other formal training, self-learning and fellowship programs (e.g. IDEO fellowship program was mentioned).

### **Work environment**

NLP students wanted to be in supportive and encouraging learning environments where they could be mentored and coached and receive regular feedback. They wanted organizations that were thoughtful and intentional about grooming the next level of leadership and emphasizing growth. ("Staff had easy access to leadership. I received good support from them and was given lots of room for growth.")

Students also wanted regular opportunities, to learn, to be innovative and creative. Students appreciated environments where they had the freedom to have flexibility to gather input and develop solutions. However some were skeptical about their nonprofit organizations being

able to provide that.. One student noted that she wanted to work at a place “where it doesn’t feel like you’re taking a risk to be creative.”

Another student said “I can’t imagine being in a place for 15 years—what motivates me is to learn new things and do new stuff, but I don’t believe an organization can keep reinventing itself to offer me new things. But if I’m not learning, I lose my motivation. I want to be married to a cause, not an organization.”

Similarly, students did not want to be part of organizations intent only on perpetuating their own existence or the status quo—they wanted to be part of organizations actively pursuing mission impact through creativity and learning. One student mentioned that she might find it appealing to work in an organization with an end purpose and a date—that the organization would achieve its mission and impact and then close down.

Students described the need for transparency and consistency in organizations. For instance, one student found it frustrating when an organization called itself democratic rather than autocratic even though decision-making was a function reserved for the top. Another found that inconsistency in leadership coupled with little feedback was de-motivating. While students valued flexibility and flatter organizations, they reported being more open to traditional structures if they had clarity about their responsibilities and the departmental and/or organizational norms allowed for creativity, innovation, and adaptability.

Students also valued a balance between work and their personal lives. In fact, some students perceived this as a difference between their generation and the Baby Boomers. The students didn’t think they could work at places where they would be expected to dedicate 24/7 to the mission of the organization—they wanted to be at places where attention to one’s own family and personal life was perceived as normative and where “older people could model the lifestyle I want”.

## Findings: Multi-generational Group

### **Motivations**

All three of the groups that composed the inter-generational conversation were compelled by, and passionate about, the need to help others and to make a difference in the world. However participants spoke from slightly different historical contexts i.e. Boomers and X’ers said they “didn’t accept the world as it was” and “sacrificed so the next generation could have it better”, the Millennials said “we appreciate what you have done and it’s not done!”. Nonetheless, they were all energized by the work of change. They all saw the need to link the local and the global; to understand and identify impact; and to develop quality relationships inside and across organizations and communities.

## Skill Utilization and Development

Millennials and Generation X'ers both reported having strong people skills as well as an ability to balance details with high-level strategic thinking; high energy, creativity, and mental organization. Millennials emphasized their administrative strengths while Generation X'ers talked about their emotional intelligence, their emphasis on development and networking, and storytelling.

A majority of the skills that Millennials wanted to develop related to better understanding the political and regional landscape as well as establishing better community contacts and a larger network in order to build a broader range of stakeholders beyond a single nonprofit. In addition they wanted to learn how to be persuasive without being controlling. They wanted to develop these skills in two ways:

- more opportunities managing people, “trial by fire” as well as connections to other people doing similar work.
- being mentored by Babyboomers and achieving a kind of “knowledge transfer” rather than being shaped to be “the same as”. (Fortunately, Boomers reported a deep interest in mentoring Millennials)

Interestingly Gen X'ers saw themselves as being the connectors between the Boomers and the Millennials, but they sometimes felt caught in a middle ground between the “louder voices” of the two. One X'er described her cohort as a smaller group “struggling to find a strong and distinctive voice.” They saw themselves often as the middle managers who had developed diplomacy skills.

- Only one Gen X reported that she wanted to develop a specific skill: the ability to better question the status quo from above and below. Others reported that they would find various opportunities helpful for their development: experience in positions of leadership (department head or executive director), networking opportunities, formal education, policy meetings and mentor relationships.
- In the interview responses without generational identification, participants also mentioned cross-generation cross-discipline transition development plans and shadowing opportunities as other ideas for knowledge sharing and skill development.

## Work environment

Millennials desired autonomy and active participation in their work environment. They wanted to have the freedom to implement their own visions, have ownership over the process and be in a dynamic work environment with room for dialogue and receive regular feedback.

Gen X'ers also emphasized the need for ownership and autonomy, but also mentioned flexibility, access to constituents and policy-makers, and support and encouragement as

important components of a work environment where they could thrive. Several also said that they valued an environment where creativity and learning were valued.

### **Other Discussion Highlights**

During the discussion of this focus group, many participants commented that there were a number of similarities among the three generations. One participant noted that it was difficult to distinguish between what was generational and what was cultural; another said the differences might be contextual as well, i.e. the result of the issues having been introduced at different historical moments.

When we asked participants to describe what they admired about the cross-generational leader they had interviewed, there were a number of over-lapping themes: determination; optimism; finding ways to adaptively respond to crisis and change; and being analytic, strategic, and humanistic. The Millennials were also described as assertive; the Baby Boomers as appreciating adversity and shared experience; the X'ers as thoughtful and dedicated.

- Technology prompted various viewpoints in the discussion:
  - Some said that Baby Boomers presumed that the human factor is missing for Millennials. Some mentioned that technology could create a barrier and that certain skills and leadership capacities can only be taught through real relationships over time between people while others saw technology as an opportunity to be able to better integrate or balance family and work. Baby Boomers expressed a desire to impart leadership abilities to following generations and wondered about how technology impacts that transfer of knowledge and skill
- All generations expressed the challenges of balancing work and personal life and the sacrifices that may be involved—some struggled more than others. Baby Boomers described having linked the “personal with the political” and used the example of having brought “daycare into their work”; they saw the importance of work and family and tried to figure out how to integrate them. Millennials wanted to create boundaries between their work and personal lives but was not sure how to find that balancing point.
- When asked whether the discourse about Millennials being more entitled played out in their experience, one Baby Boomer said “I haven’t seen it in my experience (that Millennials are more entitled—I think it’s thrown about as an accusation by Boomers.”
- Participants acknowledged the importance of listening and hearing each other and wanted to bring the conversation that we were having to their own organizations--- many participants appreciated the time spent interviewing one another in appreciative inquiry.

## Themes Across All Conversations

### MOTIVATION

#### Passion/Desire for Impact

All groups were highly motivated by mission-driven work in which the goal was to have a positive impact on people's lives and/or make the world a better place. Although there were some differences by sector regarding nonprofit organizational effectiveness<sup>8</sup> there was strong agreement that being actively engaged in social impact causes was compelling and inherently satisfying.

### SKILLS UTILIZATION AND DEVELOPMENT

#### People Skills

A greater proportion of participants in the NLP student and community nonprofit groups compared to the Wharton students emphasized that they had well-developed people skills. They described their ability to understand and collaborate, listen and ask questions, and facilitate group discussions. In areas of improvement, many participants mentioned the desire to build stronger networks in the community and improve their ability to manage more difficult group dynamics.

Wharton students tended to emphasize their analytic skills, although a number reported they were skilled in communication, debate, and facilitation. While all groups were interested in increasing their skills in group dynamics, the Wharton students described the challenges of being inspirational and the difficulty in navigating group politics and gaining buy-in for their ideas.

#### Big Picture/Strategic Thinking

While some people related that they already had a skill in this area, all except Baby-Boomers reported some need to learn how to reach effective, strategic decisions. Some people mentioned the need to understand the larger policy landscape, the political dynamics, and its implications for organizational strategic decisions. Several students in the Wharton group mentioned the need to balance the bigger picture with smaller details.

#### Value of Experience

All three focus groups emphasized the importance of experiential learning for developing the skills necessary to take on a significant leadership role. Many of the younger participants

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<sup>8</sup> Wharton students questioned whether the nonprofit structure was the "most" effective model for getting the work done given what some perceived as a lack of accountability and efficiency. They also pointed out that there was often inconsistent or unclear (quantitative) metrics to gauge impact. For the other two groups, while they talked about the importance of having impact they tended to talk more "softly" about improving people's lives and finding creative solutions.

wanted opportunities to take on more responsibility—as board members, as department heads or executive directors. The majority of participants in each focus group also valued the experience of others—learning from role models and being mentored by successful leaders.

## **WORK ENVIRONMENT**

### **Growth and Learning**

All of the younger participants across the three groups felt very strongly about being in work environments where they had opportunities to grow and learn—in fact, many expressed that absent the experience of continuing to develop, they felt little loyalty to the organization. They acknowledged the importance of human relationships in their work and deeply valued smart colleagues, mentors and role models. They consistently emphasized the importance of receiving regular and productive feedback. In the multi-generational group where the role of technology in knowledge transfer was discussed, the younger participants agreed with the Baby Boomers': the most effective way to build skills and transfer knowledge was through personal, face-to-face relationships.

### **Structure**

Millennials and Gen X'ers across the three groups appreciated certain aspects of hierarchy and eschewed others. To the extent that it contributed to clear development and progress, learning opportunities and regular feedback, hierarchy was useful. When it created obstacles to doing the work or was too inflexible to allow for work/life balance accommodations or creativity it was viewed negatively.

### **Work/life balance**

The multi-generational group specifically discussed that there were more similarities than differences across generations, but these commonalities were also evident in the other two focus groups. While all generations exhibited passion for their work, they acknowledged a need and a desire for balance and/or integration between work and personal life. Some of the younger nonprofit students and community leaders spoke movingly of the lack of women role models in the nonprofit sector who seemed able to successfully juggle work and home without enormous stress and sacrifice.

Nonetheless, both the Wharton and Nonprofit Leadership focus groups believed that the Baby Boomer found more of their value in their career achievement and were more willing to work harder and put in longer hours. This perception was not confirmed by the Baby Boomers in the multi-generational conversation, but for some students, their beliefs stemmed from their experiences at other organizations where older leaders spent longer hours at work and expected others to do the same.

### **Organizational Loyalty**

Many of the younger participants in the focus groups (primarily the Wharton and Nonprofit Leadership students) shared the sentiment that they were more committed to a cause than an organization. In fact, both of the NPL and Wharton students disparaged the notion that there was “only one” organization in which they could do “good work”. Many perceived the

Baby Boomer generation as much more willing to stay loyal to one organization and develop their career there, rather than switch organizations with the expectation of increasing mission impact and/or increasing growth and development opportunities.

Not surprisingly, however, they expressed willingness to commit long-term if the organization offered the right mix of learning opportunities, mission impact and work/life balance. For instance, one Gen X'er mentioned that she expected to eventually become the ED of the organization where she works, suggesting a long-term commitment.