



This month's tale is written by Marty Kurtz, 2010 President-Elect of the Financial Planning Association, a long time learning partner in PeerSpirit Circle Process. FPA's story is written up in Chapter 11 of **The Circle Way**, and Marty's story illustrates the challenges of refining circle use to keep it vital in an organization.

Marty is a fee-only financial planner in Moline, Illinois. He is Founder and President of The Planning Center, a financial planning firm and founder of First Step Cash Management. He serves of the boards of Ballet Quad Cities, Money Quotient, and New Life Outpatient Center. Thank you, Marty, for sharing this story.

Circle Tale, May 2010

Opening – FPA Board Meeting February, 2010

Stories and analogies can really help a group get together. The Financial Planning Association (FPA) Board of Directors has met in circle for a number of years. Leadership of the board changes every year and the board itself is in a 3-year rotation of members, not an environment for consistency. Circle, though, has become an integral part of the FPA board culture, every board meeting starting and ending in circle tradition. But, as with all great traditions, the state of "being" had begun to fade. So it seemed a "wake up" call was in order.

The concept was this, what if we drew an analogy between our board and teamwork and a basketball team and teamwork? They are similar. First, we had to create an ending, an ending of the room as we had known it, and an ending to the previous year. We couldn't have a beginning without an ending. (I've been on basketball teams that left the old floor behind). We literally waved our arms, took one last look at the old room, and proceeded to another room to prepare for our new year.

Once in the anteroom (a symbolic locker room) I, the coach, with my backwards baseball cap, called for the team to huddle around me near the entrance to this room. The group circled around me, but was by no means close, so I again called to them to huddle up. They had to get very close to each other, layering arms on shoulders and leaning forward for all to see the coach in the middle of the group. Crouching on one knee, basketball in hand, I turned to see their position and looked everyone in the eye as I declared "Last year is over! We had a great season, didn't we? But none of that matters now! We lost four great players in the off season (board members rotating off), but we picked four great free agents (new board members). It's going to change our team and our mode of play, so we have to set aside the past and get present in today. We are new together. We need to be aware and play with attention like never before. We need to watch each other and support the team. We need to slow down our passes and play with intention until we know we can play at a faster pace."

"There are going to be new rules around our circle - no cell phones or texting - our circle is sacred ground. Job one is to manage our own hoops (our bodies are in our hoops) and build the energy field that is ours and the force field of the center. If we can do this, 2010 is ours!" I said waving my arms.

In a more quiet voice, I invited the group to move in silent council as they moved into their 2010 space. "When we enter the new space, walk around the perimeter of the circle chairs and reread the agreements posted around the room. They are our rules for circle gatherings, our Vision, our Primary Aim and our Destiny, Cause and Calling. These words are why we are here. As you take your position and sit in silence, think about your hoop. Am I present? Is there anything outside our sacred ground so important that it can't wait until this gathering has ended? What agendas am I carrying? Do I need to be right? Do I need to have answers? Am I present now? As we leave this anteroom we are going to stop at the doorway and listen to a poem. As we enter our new space, start your journey, we are all in this together, and it is our year to own."



We left the anteroom and stopped at the doorway. I read the poem: "The Door Frame" and entered a new year. We checked in, were given a reading and started our meeting. From all the comments that were given, the analogy works. It was a great meeting as we started to learn how to play with intention.

If you have a tale to tell, contact the PeerSpirit office and we'll help you share it.

*For more information on many applications of circle, visit our web site at www.peerspirit.com and subscribe to our monthly Circle Tale newsletter. Your e-mail address will **not** be shared or used by anyone other than PeerSpirit, and you can unsubscribe yourself at any time.*