



This month's Circle Tale is by Janet McCallen, a consultant with a specialty working with Association Boards and a writer who makes her home in Hiawassee, Georgia, with her husband, Pat, and her Kerry Blue Terrier, Jenny. During her term as Executive Director and CEO of the Financial Planning Association, she pioneered bringing circle process to this group and attended a circle practicum in June 2003. Her current work can be viewed at: www.janetmccallen.com.

Circle Tale #53: October 2004

Circle Process and the Financial Planning Association

Nancy Johnson, CFP, is a member of the Board of Directors of the Financial Planning Association (FPA). When Nancy joined the FPA Board in 2002, it was just learning how to use Circle process. Nancy initially described herself as a "black and white" thinker, and was leery of Circle process and what the FPA Board was trying to accomplish with it. I was FPA's CEO and executive director until January 2004. In June 2003, FPA's president-elect and I attended a Circle Practicum to enhance our Circle skills. I recently interviewed Nancy on her experience with Circle:

How do you feel about Circle process now?

I think it's phenomenal. We get to the heart of an issue more quickly than a traditional board. We hear from more people than we would around a table. People are willing to share their feelings more quickly, because of the check-in and check-out. People are more willing to be open and honest. The tone we establish during check-in, of fully showing up as whole people, just carries through. We say things we might not have said otherwise. The group has the benefit of more perspectives, more honesty, than it would otherwise, and that helps us make better decisions.

It still can be frustrating – but for shorter periods of time than it was originally. I saw it break down badly once for an hour, and that helped me realize how well it works when it's working properly.

Why do you feel Circle process is valuable to a Board like FPA's?

Because we're not a doing board, we're a board that focuses on strategic thinking and visionary thinking. The Circle allows us to get to that quicker than in a board room setting. It gives people the comfort level to lay it out, whatever they're thinking, even if they're not sure that it's the right thing to say. We have a much greater comfort level than I have seen in a regular board setting. When we are sitting in our circle and discussing a difficult or emotional topic, we get to the heart of the topic, and at the end of the discussion, however long that takes, I always feel like we made the right decision. One person didn't sway or control it. We got to the heart of the matter. I never feel like a decision has been pushed down my throat, by the leaders or anyone else. It makes a difference in how we leave the meeting and talk about it, support the decisions we make.

You rarely walk out of the meeting with a lot of smaller groups bitching about what happened. You reached a consensus, and most people in the room feel comfortable and are okay with moving forward. Sometimes you walk out of there, and you know you didn't reach a decision. At the beginning that was frustrating for us, especially for me. And the topic simmers in the time between meetings, and the next time you come back to that topic, it becomes easier to get to a consensus. You get there quicker. The previous conversation wasn't wasted. I have faith in that now.

I feel less personally attached to the outcome. When I leave the board room, after we're done reaching a decision that I was hesitant about or adamantly opposed to, I'm not opposed to it anymore, or I feel better about it. I feel like I have the right and freedom to say what's on my mind; I get to state my opinions and my feelings. Some times it's pure feelings. That's really important. For visioning, especially, feelings can



be very important, more important than facts. I feel more like I was involved in the decision, even if I didn't want it originally. I don't walk out angry and frustrated. I feel heard. That's huge.

If you could share a message with folks who are skeptical about whether their group should use Circle process, what would it be?

Be open. Be open to the process and be willing to give it time. You won't be in the perfect place immediately. You have to work at it. You'll have days where you think it doesn't work. In the long run, it will make you such a stronger group, because all your members will feel heard, will have expressed their thoughts, and you'll arrive at better decisions as a group than if a few people are pushing or leading a decision. It can be hard for leaders, because their agenda can be taken away from them. They have less position power in a Circle than a traditional Board. The entire group is exercising leadership in a Circle.

What do you most appreciate about Circle process?

Honesty. Safety. There's safety there. Because we have gotten our Circle to the point where it's a very safe environment. You can say something that might be contrary, or off the wall, or personal, but the group will not hold it against you or look at you funny. It opens the whole group up, not just one or two people, to say whatever is on their minds. Circle is a big reason why I have the comfort level to consider running for President. Because the circle will hold the responsibility, and all I have to do is help create the safe container for the group to be in the conversation. In Circle, the entire group is exercising leadership.

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

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