

Learning and Leading

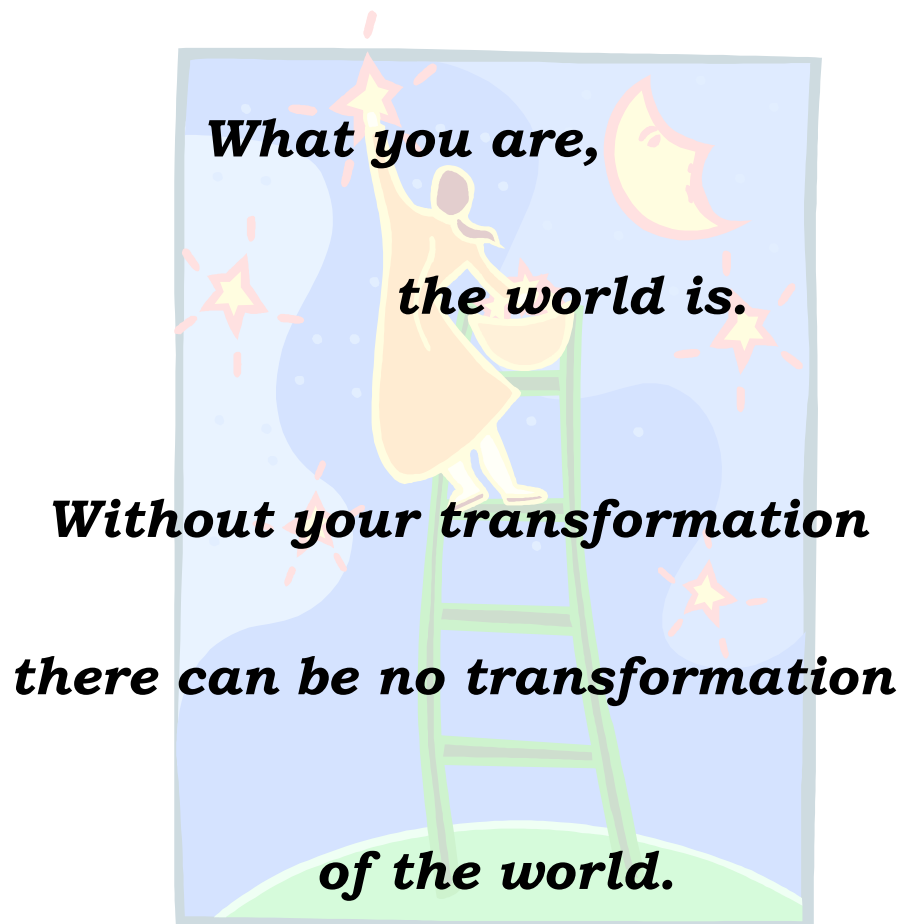
Transforming the Voluntary Sector
through Learning and Leading



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- J. Krishnamurti

Executive Summary

This report is framed around a set of provocative propositions (statements that bridge the best of "what is" with "what might be") that come out of our research about learning and leading in the voluntary sector in Canada. The voluntary sector is powerful and influential. Leaders are competent. Learning is flourishing everywhere. Learning and leading are happening, now.

The Voluntary Organizations Consortium of BC (VOC BC) and Langara College collaborated throughout 2004 to identify strategies and actions to enhance leadership capacity in the voluntary sector with a particular emphasis on leaders who work in paid management and leadership positions, are in small organizations and especially those that serve vulnerable populations.

Learning and Leading was grounded in the work of the National Learning Initiative that took place in 2002-03 under the direction of the Coalition of National Voluntary Organizations and the Association of Canadian Community Colleges. This work showed that the voluntary sector has changed, the competencies needed to lead have changed, funding has changed, the way we lead has changed, and the way people learn has changed. A set of leadership competencies, developed for leaders in the voluntary sector, formed the basis for much of our work.

A variety of concepts and methods were used to explore the concepts of learning and leading. We incorporated elements of participatory action research and appreciative inquiry into our overall approach. We used systems thinking and complexity concepts to explore our perspectives about leadership and the voluntary sector. We were committed to the principle of social inclusion, designing our initiative to ensure that a broad range of people could participate, including those from organizations who serve vulnerable populations.

We created a wave of change – a VIRUS (Voluntary Initiative Resulting in Ultimate Synergies) – to enhance the culture of learning, develop leadership and support the voluntary sector to become more powerful and influential. We spread this ‘virus’ by organizing and facilitating activities throughout British Columbia, involving over 250 individuals. We engaged these individuals through interviews, dialogues, workshops, various activities at Langara’s Summer School on Building Community and in meetings.

We discovered that a shift in the culture of learning is needed. This cultural shift requires ‘hardwiring’ new patterns of thinking, an increased tolerance for ambiguity and an openness to new systems and communication processes.

We found that voluntary sector leaders take responsibility for their own learning, their organization’s learning, and interestingly, for learning within the voluntary sector. No one type of learning method emerged as the most important. Instead participants spoke about the need for a complete spectrum of learning methods and opportunities, accessible to different types of learners and organizations. We found that working in the voluntary sector was the career of choice for many of the *Learning and Leading* participants.

Learning was not just seen as a voluntary sector issue. Participants spoke about the critical need for funders, post secondary institutions and corporations to learn *together* with the voluntary sector.

Participants from other sectors are inspired by leaders in the voluntary sector. They see voluntary sector leaders as powerful and influential and are inviting them into their workplaces in order to learn from and to inspire their own workers.

To facilitate voluntary sector learning and leading, change is needed *within both the educational and voluntary sectors*. A new role for post-secondary institutions was explored. As a result of the *Learning and Leading* initiative, Langara College has deepened its relationships with key organizations in the voluntary sector and

forged new relationships. The partnership with VOC BC has enabled Langara to reach out to a diverse and broad network of voluntary agencies in BC with whom it did not have previous relationships. As a specific follow-up to this project, Langara is committed to working with VOC BC and other key organizations to organize a *Learning and Leading Exchange* involving established and emerging leaders from a number of community and regions in BC.

BC's more progressive funders have moved into the forefront of this movement to enhance leadership in the voluntary sector.

Barriers to learning still exist and more work is needed to reduce these barriers. We especially need to understand barriers to learning for small organizations that serve vulnerable populations.

Five tools have been developed to share with other organizations and institutions across Canada.

We believe that the process we engaged in through *Learning and Leading* can be adapted by colleges and voluntary sector organizations in other communities and provinces. Post-secondary institutions, funders, corporations and governments can learn from the voluntary sector and they can partner with voluntary sector organizations to initiate change.

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Introduction: We're being provocative

This paper is framed around a set of provocative propositions¹ that come out of our research. These statements are a challenge to you. They are statements of how the future might be. If this is how you would like things to be in your community, then get involved.

Call together a few colleagues and share your ideas about learning and leading in your community. Read this paper, and then take action by using the tools outlined in A Travelling Troubadour's Bag of Tools at the end of this paper.

Soon the voluntary sector in your community will be powerful and influential, leaders will be competent, learning will be flourishing everywhere, and learning will be happening, now.

Transformation

This paper challenges each of us to examine our role and to be collaborative and strategic in supporting leadership development in the voluntary sector.

We encourage you to consider this vision for the sector and invite you to take action.

It is through transformation – personal, organizational and sectoral – that we can make the world a better place.

¹ A provocative proposition is a statement that bridges the best of "what is" with your own speculation or intuition of "what might be". It is provocative to the extent to which it stretches the status quo, challenges common assumptions or routines, and helps suggest real possibilities that represent desired possibilities for an organization or community and its members. See David Cooperrider, *Appreciative Inquiry Commons*, Dec 2004
<http://connection.cwru.edu/ai/practice/toolsPropositionsDetail.cfm?coid=1170>

This is the Way We Want to Be

(Our Provocative Propositions)

The voluntary sector is powerful

1. The sector is vital, healthy and productive.
2. The sector is evolving and emerging in a powerful way.
3. The sector is full of leaders who are shaping the future.
4. Voluntary sector leadership is valued and distinct from government and corporate sector leadership.
5. Working in the voluntary sector is the career of choice in Canada.



Leaders are competent

6. Individuals have the full complement of competencies required to lead the voluntary sector, now and in the future.
7. Individuals of all ages are engaged in and valued as leaders of the sector.
8. Leaders achieve their organization's mission, contribute to their community's well-being, and influence global issues.
9. Leaders are collaborating efficiently and effectively.
10. Leaders balance complex dilemmas and multiple accountabilities.
11. Leaders maintain a holistic perspective, balancing self care with care of their organizations and the world.
12. Leaders are reflective and wise.

Learning is flourishing everywhere

13. We can find learning in many places and it is ours to initiate and ours to keep alive.
14. We respect and value all ways of learning and can find it in many places – a complete spectrum is available and accessible.
15. Leaders shape their organizations into learning organizations and are transforming the sector into a vibrant learning culture.
16. Post secondary institutions, funders and the sectors (and its sub-sectors) are leveraging their resources and, together, are learning to make the world a better place.

Learning and Leading are happening, now

17. There are no barriers to learning.
18. Together, we are implementing this vision now.

Learning and Leading

In the fall of 2003, Langara College Continuing Studies invited the Voluntary Organizations Consortium of BC (VOC BC) to collaborate on an initiative to explore and enhance the learning culture of voluntary organizations in BC.

VOC BC is a network of provincial and coalition organizations that involve volunteers in a wide variety of sectors: health, education, social services, sport, recreation, arts, culture, multiculturalism, aboriginal, disabilities, children/youth, business, environment and others. The vision of VOC BC is to be a leader in the promotion of a society that recognizes the essential role, value and diversity of volunteers in improving the quality of life in BC. Among its strategic priorities, VOC BC plans to facilitate dialogue on voluntary sector issues, community trends and socio-economic needs in BC communities. It plans to build the capacity within voluntary organizations for planning, analysis and policy development.

The Voluntary Organizations Consortium of BC (VOC BC) and Langara College collaborated throughout 2004 to identify strategies and actions to enhance leadership capacity in the voluntary sector with a particular emphasis on leaders who:

- work in paid management and leadership positions
- are in small organizations and
- serve vulnerable populations

A project team consisting of representatives of both VOC BC and Langara College Continuing Studies played the dual roles of “idea incubator” and “process initiator” to engage with organizations and individuals involved with the voluntary sector in BC.

The results of this exploration and outreach process, *Learning and Leading*, are detailed in this paper. In addition to the provocative propositions around which this paper is framed, there are quotes from various people with whom we engaged in the course of this initiative.

The relationship between VOC BC and Langara College Continuing Studies has been so rewarding that we continue to work and learn together, leading a process that we hope will transform the voluntary sector in British Columbia.

The *Learning and Leading* Project was one of five pilot projects across Canada, which emerged from the National Learning Initiative and the Human Resources in the Voluntary Sector initiative. The other projects are summarized in Appendix 2.

A Note on ‘Leadership’

In this project, ‘leadership’ does not mean ‘Executive Directors’...nor does it mean ‘Presidents.’ Leadership can be found throughout organizations in people of all ages and positions. Our research focuses on enhancing the current culture of learning so that leadership at all levels can achieve their organization’s mission, contribute to their community’s well-being, and influence global issues.

The VOC BC/Langara *Learning and Leading* project

VOC BC and Langara College worked together with the intention that by the end of this initiative:

1. Voluntary sector leaders in BC would have reflected on the competencies needed for coping with the complex challenges they face
2. Voluntary sector leaders would have increased their awareness of the competencies they already have and identified areas for further self- development
3. Key representatives of voluntary sector organizations, post secondary and training institutions and funders would have an enhanced understanding of:
 - how leaders learn, and;
 - how to nurture and develop new and emerging leaders in voluntary sector organizations
4. There would be an enhanced culture of learning:
 - among voluntary sector organizations (e.g. ownership by voluntary sector organizations of their own responsibility for learning and leadership development, more active role of VOC BC and other sector leadership organizations)
 - among education and training institutions
5. There would be a more committed institutional response from Langara College and other post-secondary institutions, with an emphasis on ongoing and sustainable actions and activities.
6. There would be leaders who have developed connections across sub-sectors.
7. There would be increased trust, mutual understanding and relationships between providers of education and training, voluntary sector organizations and funders.

At the end of 2004, we are beginning to achieve these goals and the process is spreading across British Columbia.

The Concepts We Used

Participatory Action Research

All of us who lead this process believe strongly in inclusion and participatory action research (PAR). In the most general terms, PAR can be described as a grassroots research process. Involvement in a PAR process provides community members with the tools and knowledge to affect changes in their lives and their communities².

For the first few months of our project, our project group became a micro learning community where together we explored concepts such as complexity thinking, changes and needs in the voluntary sector, and community engagement processes to invite others into a process that would seed new ideas and ways of thinking about these issues.

This process, like real-world learning, was both frustrating and invigorating. Sometimes we appeared to be going in circles but eventually we emerged with some processes and plans for engaging others in this learning.

- Chloe O'Loughlin

We were funded by people who, like us, believe in social inclusion. We believe that people need to be involved in making change happen. This process was iterative. We learned through our own exploration as well as through dialogue and exploration of themes related to leading in the voluntary sector with a range of different groups. Through conversations, interviews, workshops and dialogues, we invited people to share their own experiences and to explore the NLI's Leadership Competencies.

Turning Our Thinking Upside Down: A Complexity Approach

We knew that we needed to break new ground. The voluntary sector has undergone significant growth and change in recent decades and the environment in which leaders are working is more complex and diverse than ever before. Voluntary sector leaders require an increased range of competencies to deal with this complexity and the rapidity of change. In addition, the range of opportunities for learning has increased due to new technology as well as new understanding in the fields of organizational development, education, psychology, social change and community development.

We knew also that we were seeking different answers. We decided to develop a complexity thinking framework for our work.

Appreciative Inquiry

Appreciative inquiry served as a framework to *discover* shared meaning and values, and to engage with others in the questions about what we valued most. We talked with community members, inviting them into conversations about when they were their best as leaders. We also held more structured interviews and dialogues where participants shared stories and reflected on their challenges and dilemmas. A more complete description of Appreciative Inquiry can be found in section A Traveling Troubadour's Bag of Tools at the end of this paper.

² Bell, Deborah and Kemp, Leslie. Bridging Scientific and Community Knowledge: A Discussion Paper on Participatory Action Research. 1996.

Complexity Thinking Created the Context for Engaging With the Voluntary Sector

We found that systems thinking and complexity concepts were a powerful way to change our own perspectives about leadership and the voluntary sector. We believed that the process of collaboration would transform and shift who we were and therefore what would be possible.

We believed that:

- As we learned together, we needed to release our assumptions about certainty and predictability.
- The *process* of identifying issues, seeing new possibilities and changing how we adapt or cope, requires rethinking and redesign.
- As the ‘champions’ of this process, we were faced with changing our mental models, our personal habits of perceiving, thinking and acting, and our thoroughly embedded relationships.
- Focusing on what attracts people and on the “naturally occurring processes”, where people are already engaged, would provide ‘leverage’ for exploring these new ideas.

Before new learning could take place, we needed to “unlearn” our assumptions about project planning and management. We considered a new way of thinking about what we were up to. We agreed to be guided by the following assumptions:

- As individuals, we are inexorably linked to the culture of the organization(s) and communities of which we are a part.
- Our ‘mindsets’(variously described as mental models, individual cognition, perspectives, assumptions, biases, etc.) needed to be made explicit. This helped us create shared meaning and guided the ‘mindshift’ which created change and real learning for us and for leaders in the sector.
- Learning involves adapting to changing conditions, which involves shifting both our individual and collective ‘filters’ from a steady state perspective to a chaotic, systems perspective.
- Learning is complex and happens through connections and relationship building.
- The outcomes of this initiative could not be predicted. They would not happen in a linear progression, but would ‘emerge’ in the context of the relationships we created.

In the past, we have tried to implement change by identifying the resisters and factors that could impede progress, and then try to overcome them. In this process, we paid attention to and worked with the ‘attractors’, the forces for pulling leaders and the sector forward.

The concept of **attractors** is taken from the ‘new science’ and is being applied to organizations and communities. Conceptually, we can shape our beliefs and desires about the future so it approximates the operation of a strange attractor.

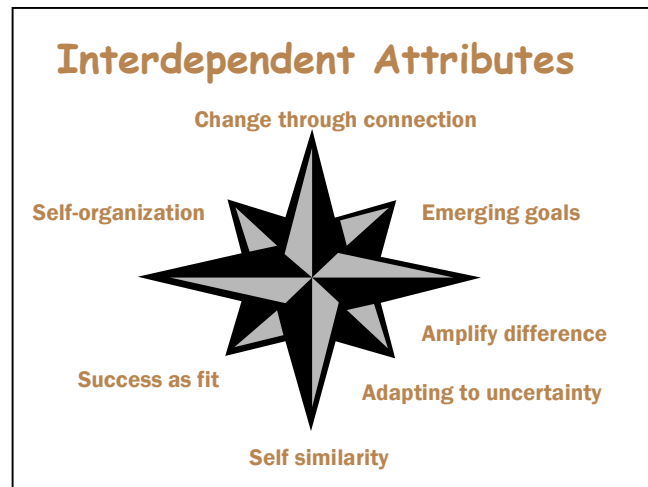
“Ever since my imagination was captured by the phrase 'strange attractor', I have wondered if we could identify such a force in organizations. Is there a magnetic force, a basin for activity, so attractive that it pulls all behaviour toward it and creates coherence?”

“My current belief is that we do have such attractors at work in organizations and that one of the most potent shapers of behaviour in organizations is meaning....”

- Margaret Wheatley, *"Leadership and the New Science"*, pp 133-134.

We created these conditions:

1. We focused on creating change through connections.
2. We focused on emerging goals rather than trying to predict concrete results.
3. We adapted to uncertainty.
4. We amplified differences.
5. We focused on similarities.
6. We defined success as 'fit'.
7. We honoured principles of self-organization.



Social Inclusion

Social inclusion was an important value underpinning this initiative. Interviews were held with people from organizations serving vulnerable populations. Dialogues and workshops were designed to include a broad range of people, including those from organizations who serve vulnerable populations. For many of these activities there was no charge and for others (eg., Summer School on Building Community, fees were waived or reduced for a significant number of individuals).

An aspect of social inclusion is about integrating learning and training in a meaningful way into people's work and professional lives. It's not just about them coming to us, but about facilitating learning through the integration of their work and life experiences. It is also about providing opportunities for skill development in their work and local community settings (interview with Paula Carr, Collingwood Neighbourhood House). Paula also spoke about this at the forum at the Summer School.

Some people get inclusion confused with representation. In Learning and Leading, we included individuals by providing whatever kind of support they needed (e.g. free workshops). Then we treated them as equal and valued participants.

– Doug Soo

I work with socially excluded individuals and groups; this is not a homogenous sector. I ask you this question: how do people learn in the context of poverty, cutbacks, loss, and survival – both personal and organizational poverty? How can these people get educated so they can move up or get out of the context? How do we give them credit for what they learn?

– Debbie Bell, Community Education Programs, Simon Fraser University

Sharon Kravitz (also at the Summer School forum) talked about seeing people, even those living on the street, as potential contributors, not just as people in need or people with problems. She talked about how she used art, games, etc. to engage street people and through these approaches they may seek opportunities beyond the immediate gratification of drugs. While this does not directly relate to inclusion of people employed in the sector, it was one of the more powerful stories of social inclusion we encountered.

An *Addiction in Vancouver* symposium was an example of how Langara College, working in partnership with the Community Arts Council of Vancouver and other organizations, supported an exploration of the roots of addiction in an event that involved a diverse range of people including many from organizations serving

vulnerable populations. Over 130 people attended. The collaboration between Langara College and the Community Arts Council of Vancouver began at Langara's Summer School on Building Community.

Although we focused on social inclusion in this initiative, we were still challenged, especially by one individual, to think more about this issue and try harder.

Spreading the VIRUS

We decided early in the process that we wanted to create a wave of change that would spread throughout the sector in British Columbia. We called this a VIRUS³ (Voluntary Initiative Resulting in Ultimate Synergies) and joked about wanting to infect people with our virus. All joking aside, it was an important concept that significantly shaped our research. We wanted to enhance the culture of learning in order to develop leadership so that the voluntary sector could become more powerful and influential. This concept is based on the "The Tipping Point" by Malcolm Gladwell.

What must underlie successful epidemics, in the end, is a bedrock belief that change is possible, that people can radically transform their behaviour or beliefs in the face of the right kind of impetus. Tipping Points are a reaffirmation of the potential for change and the power of intelligent action. Look at the world around you. It may seem like an immovable, implacable place. It is not. With the slightest push; just in the right place; it can be tipped.

The Tipping Point is one dramatic moment in an epidemic when everything can change all at once. It is the moment of critical mass, the threshold, the boiling point, a place where the unexpected becomes expected, where radical change is more than possibility. It is a certainty.

In order to create one contagious movement, you often have to create many small movements first.

- Malcolm Gladwell, The Tipping Point

Creating many Small Movements

We determined that we would spread a VIRUS (or create a Tipping Point) by hosting many activities all around the province. We involved over 250 individuals in:

- 18 in-depth interviews
- Three dialogue sessions involving 14, 20 and 29 individuals
- Full day workshops hosted by VOC-BC
- Focus groups and dialogues with MALT learners at Royal Roads University
- Half day workshops in Kelowna, Prince George and Vancouver
- A half day workshop for Executive Directors
- A 3-day summer school for 130 individuals, including a one-day session, Learning to Lead, involving 90 participants), an evening forum: Leading with A Difference – Community Innovators Share their Stories, and two workshops specifically dealing with leadership: Learn the Latest about Leadership and Transformative Leadership.
- Meetings with the United Way of BC and the Vancouver Foundation

³ The VIRUS metaphor builds on the ideas from The Tipping Point by Malcolm Gladwell: a good summary of this book: <http://radio.weblogs.com/0107127/stories/2003/01/01/tippingPointNetVersion.html>

- Meetings with other post-secondary institutions
- A half-day meeting with 16 individuals to talk about developing a learning culture in the voluntary sector in BC. The participants were from the voluntary sector, funders, and post-secondary institutions. All agreed to organize an event involving participants from across BC in early 2005 that would facilitate further dissemination of the ideas and concepts of learning and leading, including communities in different parts of the province.

We used a variety of tools and techniques, including:

- Appreciative Inquiry interviews with individuals
- World Café
- A Spectrum of Learning tool was developed and used in workshop
- Popular education methods and exercises including Leadership Bingo, Mapping, networking game, and story telling
- Three Dialogues on topics relevant to the voluntary sector in BC were held
- Mentoring
- Mapping
- Reflection
- Presentations and workshops
- Discussion and focus groups
- Outreach efforts: web site, brochures, flyers, etc.

We compiled and analyzed data and evaluations from all of these activities and events. We tested our learning at subsequent events.

Through this paper, we are sharing what we have learned. We invite you to use this paper to explore learning and leading with voluntary sector leaders in your community.

Measuring our Success within this Context

At the outset of this initiative, we decided that we could not predict what would be the outcomes of our explorations. We were committed to a process of exploring ideas and concepts within our project group and finding a way to introduce them to others. It was agreed to use both “naturally-occurring events” as a way to do this as well as to organize some of our own activities and events.

We set short-term goals, reviewed the outcomes of our activities, then we set new goals. We tracked our actions and initiatives throughout the process.

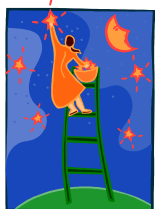
This was an iterative process, recognizing the complex nature of what we were trying to accomplish⁴.

⁴ The reference for this approach can be found in the article Evaluating Performance in a CAS [complex adaptive systems] at <http://www.complexod.com/eval%20article/eval%20article-2.html>.

Being Grounded in Our History

The National Learning Initiative for the Voluntary Sector

Learning and Leading was grounded in the work of the National Learning Initiative that took place in 2002-03 under the direction of the Coalition of National Voluntary Organizations (NVO) and the Association of Canadian Community Colleges (ACCC). Both groups identified leadership as a critical issue for the sector and agreed to work together to develop and implement a National Learning Initiative for the voluntary sector.



The sector is vital, healthy and productive.

This is the Way We Want to Be

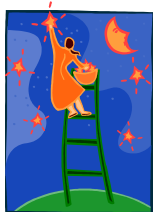
The overall vision of the National Learning Initiative was “to further social development in Canada through a national skills and learning framework for the voluntary sector and to establish the voluntary sector as an employer of choice through a lifelong learning ethos.” The goal was to enhance the quality of leader-managers in the sector, focusing on leadership, which encompasses, but is more expansive, than traditional management.



The sector is evolving and emerging in a powerful way.

This is the Way We Want to Be

The NLI’s decision to focus on leadership was as a result of several background studies focused on identifying key issues and trends impacting on the capacity of the sector to become the employer of choice.⁵ Recent studies⁶ identified that there is an aging cohort of Executive Directors, and staff in general. There is a potential for transformation of the sector as current Executive Directors retire, or as managers in closely related sectors, i.e. government and quasi-non-governmental organizations, retire and leadership from the voluntary sector is hired into the better-paying sectors to complete their paid work life.



⁵ Commissioned by the Human Resources Sub-committee of the Capacity Joint Table of the VSI.

⁶ Including: The National Survey of Nonprofit and Voluntary Organizations, work done by Eakin and Scott, the Canadian Policy Research Network, the Canadian Council on Social Development, and the VSI.

Individuals of all ages are engaged in and valued as leaders of the sector.

This is the Way We Want to Be


This research highlights the need for succession planning. A high proportion of voluntary sector leaders are expected to retire in the next ten years. Additionally, changes in the financing of the voluntary sector in the 1990s, including downloading of government services onto voluntary sector organizations, places increasing financial pressure on nonprofits, leading to the reduction of middle management positions within the voluntary sector. This means that there is no clearly identifiable group within the voluntary sector coming up through the ranks to assume senior leadership positions within organizations.

The Sector has Changed Significantly Over the Past Ten Years

Throughout the National Learning Initiative process, participants identified a major shift that has been occurring in the sector over the past ten years. This fact is a critical cornerstone of our *Learning and Leading* project, thus it is worth presenting their findings here.

Organizations and leaders are no longer primarily focused on managing their own organizations – they now focus on leading effective social change, are accountable to multiple stakeholders, collaborate more, have complex relationships, and deal with funders that shift their focus and priorities.

Many voluntary organizations are challenged by the changing nature of their relationship with government – more competition for funds and a shift from granting to contracting. While in the past governments frequently funded advocacy activities and organizations, this is no longer the case. This has had a profound affect on the sector and their ability to advocate.



Our context has changed. The sector has changed, competencies have changed, funding has changed, the way we lead has changed, and the way people learn has changed. So we must change, we must transform ourselves individually and as a sector.

- Diana Smith

Significant change in the sector



These changes in the sector affect the types of competencies needed for senior staff. Voluntary sector organizations require senior staff who can both manage their organizations effectively, and are attuned to the ongoing changes that affect their organizations: shifts in policy, financing, social and economic trends, etc. Their focus needs to broaden from their traditional domain to encompass the broader spectrum of forces that influence the well-being of their organizations and the constituencies which they serve.



Leaders achieve their organization's mission, contribute to their community's well-being, and influence global issues.

This is the Way We Want to Be

Leaders are now more attentive to their community and what happens in the world (rather than focus exclusively on their own organization). Likewise, their boards' focus is more outward. Leaders inspire, rather than direct. They balance fundraising with generating wealth. They give attention to building civil society rather than to fighting issues. Their worldview has expanded.



The sector is full of leaders who are shaping the future.

This is the Way We Want to Be

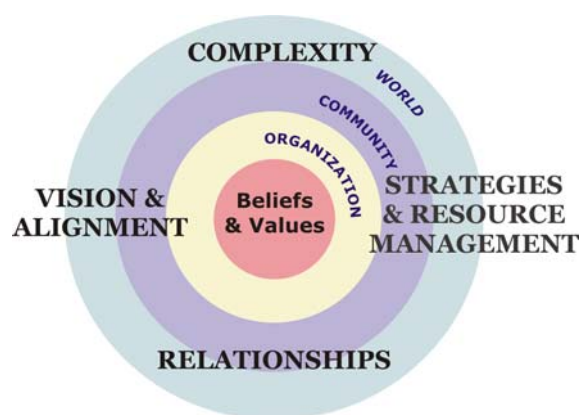
Significant change for leaders



Competencies for Voluntary Sector Leaders in the 21st Century

In 2002, the National Learning Initiative identified the core competencies required for senior voluntary sector leaders and managers. Those who participated in this process defined “Competency” as: **the knowledge, skills, abilities, intangible/tangible mindsets and behaviours (savoir, savoir-faire, et savoir-être) that lead to improving life in the community and the world through principled actions and professional behaviour in the voluntary sector.** Core competencies are defined as those that are common across the voluntary sector, irrespective of regional or sub-sectoral differences.

Participants generated a competency profile that has been summarized into five key areas of competency: Beliefs and Values, Aspirations and Alignment, Strategies and Resource Management, Relationships, and Complexity. They are defined as follows:



| Vision & Alignment | Strategies & Resource Mgmt | Relationships | Complexity | Beliefs & Values |
|--|---|---|--|---|
| <ul style="list-style-type: none"> • Public action | <ul style="list-style-type: none"> • Fund raising | <ul style="list-style-type: none"> • Interpersonal relationships | <ul style="list-style-type: none"> • Healthy workplace environment. | <ul style="list-style-type: none"> • Social responsibility |
| <ul style="list-style-type: none"> • Public policy | <ul style="list-style-type: none"> • Financial stewardship | <ul style="list-style-type: none"> • Communication | <ul style="list-style-type: none"> • Creative & innovative culture | <ul style="list-style-type: none"> • Sustainability & self-sufficiency |
| <ul style="list-style-type: none"> • Ethical & value-oriented decisions | <ul style="list-style-type: none"> • Marketing & PR | <ul style="list-style-type: none"> • Political acumen/savvy | <ul style="list-style-type: none"> • Adaptation to change | <ul style="list-style-type: none"> • Building capacity |
| <ul style="list-style-type: none"> • External relations | <ul style="list-style-type: none"> • Info & communication technologies | <ul style="list-style-type: none"> • Public persona | <ul style="list-style-type: none"> • Multiple accountabilities (including governance) | <ul style="list-style-type: none"> • Individual ethical & Principled behaviour |
| <ul style="list-style-type: none"> • Action on global issues | <ul style="list-style-type: none"> • Research | <ul style="list-style-type: none"> • Human resources | <ul style="list-style-type: none"> • Interdependent perspective | <ul style="list-style-type: none"> • Inclusion & diversity |
| <ul style="list-style-type: none"> • Culture of learning | <ul style="list-style-type: none"> • Planning & evaluation | <ul style="list-style-type: none"> • Team development | <ul style="list-style-type: none"> • Awareness of context | <ul style="list-style-type: none"> • Passion & compassion |
| <ul style="list-style-type: none"> • Vision | | <ul style="list-style-type: none"> • Collaboration | <ul style="list-style-type: none"> • Cooperation & competition | <ul style="list-style-type: none"> • Courage |

What we learned about leadership competencies



This is the Way We Want to Be

Individuals have the full complement of competencies required to lead, now and in the future.

Voluntary sector leadership is valued and distinct from government and corporate sector leadership.

Leaders are collaborating efficiently and effectively.

Leaders balance complex dilemmas and multiple accountabilities

Leaders maintain a holistic perspective, balancing self care with care of their organizations and the world.

Leaders are wise and reflective.

Throughout the *Learning and Leading* process, VOC BC and Langara College used these competencies as a basis for discussion. We wanted to see if

these competencies were valid in British Columbia and learn how leaders learned these skills, knowledge, beliefs and values.

Those who participated in our Learning and Leading initiative generally validated the scope and breadth of the NLI competencies. For many, these competencies described the complexity of their jobs. For some, the competencies explained their desire to increase their skills and knowledge in order to lead their organizations more effectively. For others, the competencies illuminated the need to make radical changes.

Participants in BC validated the competencies by speaking about them in a variety of ways. The competencies that were discussed most often were collaboration and partnership.

“Belief in the power of collaboration vs. hierarchy of power”

“Shared leadership and responsibility”

People spoke about the challenge of balancing conflicting competencies.

“Finding a balance between motivating and directing.”

“Achieving all I have to do while keeping my organization afloat. It seems to be impossible to do both.”

“Knowing wise assertiveness while being harmless as a dove.”

The value of the competencies

Probably the most a-ha's we heard in the Learning and Leading process was when we presented the competencies and invited participants to work with them.

In one instance, we mailed the competencies to an Executive Director who told us, “I ran around the office waving the competency list, shouting, ‘this is it...this is what I do. My job IS complicated.’ Then she sat down and identified her strengths and weaknesses.

She found that she needed to work on the competencies related to complexity...but there were no courses or training available in her community for this. Then she asked her staff to review the competencies and identify their strengths and weaknesses.

Together they mapped out where they wanted to learn together and how they wanted to learn those competencies. It was a remarkable breakthrough for them.

She believed that these competencies transformed her organization because they are not simple. They are detailed, complex, subtle, complicated...just like her job.

- *Chloe O'Loughlin*

Participants spoke about the need for self-awareness and self-care – competencies that were not identified initially by the NLI. Many identified the need for wisdom and time to reflect.

“Our work lives are so busy that we don’t have time to reflect. This is an important way of improving our leadership skills.”

“We need to balance our business with quiet time.”

“We need to spend time on relationships. This is as important as reflecting on our work.”

“Wisdom is different from fact finding, we need to become wise leaders.”

Some competency strengths and gaps

At a Learning To Lead workshop, we asked the 90 participants to identify their strengths and the areas where they needed to learn more. Then we asked them to place coloured dots on a wall chart, green ones next to the competencies where they were already strong and red ones beside the competencies where they needed to learn more. We all watched in amazement as the dots were placed and clear results came into focus: The participants acknowledged that they were collaborative individuals, highly ethical, having good values, and great with change. They needed to learn the skills that are most focussed on influencing change: public policy, political lobbying, political savvy, action on global issues, fund raising, and technological understanding.

Having the skills, knowledge and beliefs that can help us build better communities and influence change....these are the competencies that are required most often.

– Leslie Kemp

| Major Strengths (of competencies most important to group members) | Major Gaps (of competencies most important to group members) |
|--|---|
| Adaptation to change – 17 Interpersonal relationships – 16 Ethical and value-oriented decisions – 12 Culture of learning – 12 Vision – 12 Planning and evaluation – 12 Collaboration – 12 Healthy workplace environment – 11 Passion and compassion – 11 | Public policy – 23 Political acumen/savvy - 20 Fundraising – 20 Info & communication technologies - 15 Action on global issues – 14 Financial stewardship – 14 Public persona - 13 Marketing & PR – 11 Creative & innovation culture – 10 |

Moments of Maturation

When I presented the competencies to four organizations, each experienced what could be called a ‘moment of maturation’. One organization’s board of directors understood why their staff person was not meeting their expectations and hired an additional staff person with explicit competencies that melded with those of the Executive Director. One decided that they needed to change the way that they were leading and to become much more engaged.

The competencies clearly show groups how difficult it is to lead organizations in the voluntary sector...the competencies are complicated and rich. Their depth is eye-opening and life changing. They cause people to stop and think. They cause groups to reach a moment of maturation where they understand that they need to do things differently.

– Doug Soo

Components of a Learning Culture

A Man and a College take up the Challenge

Diana and I, as contractors for the National Learning Initiative, stood at the front of the room presenting our findings about the newly identified leadership competencies. Many people in the audience were from colleges and universities that teach nonprofit management.

The competencies were complex, substantial and remarkable in themselves. But we added one other unofficial finding – a sub-text that we had heard across Canada. If it was right there would need to be a radical rethinking of the way that post-secondary institutions interacted with the voluntary sector.

We had heard that leaders did not naturally turn to the post secondary institutions to learn how to become leaders in the voluntary sector. No one was telling us that they learned leadership competencies at colleges or universities. So we recommended that colleges not proceed to curriculum revision and course development until they had engaged with the voluntary sector and learned more about how leaders learn how to become leaders.

Doug Soo, of Langara College, took that admonition to heart and invited VOC BC, as a network of provincial voluntary organizations, to engage in a process of exploring how voluntary sector leaders learn to lead.

Doug and the staff in Continuing Studies at Langara have committed to engaging in a meaningful way with voluntary sector organizations in this and other initiatives. As a result, Langara College is deepening relationships with those in the sector and through this process, is being transformed. Its own culture of learning is being shaped through these relationships and Langara College is facilitating community change in British Columbia.

Working with Doug and the rest of the team has been my greatest privilege.

- *Chloe O'Loughlin*

A cultural shift in the voluntary sector demands new ways of thinking, being and acting. Initially we stated that we wanted to 'create a culture of learning', but a culture of learning already exists in the voluntary sector in BC – we now recognize that it needs to be enhanced. This cultural shift requires 'hardwiring' new patterns of thinking, an increased tolerance for ambiguity and an openness to new systems and communication processes.

Several key themes emerged from the interviews, workshops, dialogues and our multi-sectoral meeting. These themes are presented in the form of "Provocative Propositions," statements about our ideal future. These provocative propositions are meant to challenge our readers to think about learning in a new way. They reflect what the participants of *Learning and Leading* told us about learning. A Provocative Proposition discussion tool can be found in the Travelling Troubadours Bag of Tools at the end of this paper.



We can find learning in many places and it is ours to initiate and ours to keep alive.

This is the Way We Want to Be

Participants spoke about learning in a variety of ways and in a variety of places. They took personal responsibility for their own learning, their organization's learning, and interestingly, the voluntary sector's learning. They acknowledged that learners of different ages learn differently.

“We need to acknowledge that there are different ways of learning, e.g. the baby boomers have been exposed to many different ways of gaining information. Training and learning opportunities must be provided differently and in a way that is acceptable at “twitch speed.”

“There are generational shifts in leadership, approaches to leadership, and ways those different generations learn how to be leaders.”

“The big thing about my own personal leadership is that I've been allowed to lead and have been supported. Experiential learning is important.”

Learning is self-generating and self-sustaining

Half way through the project, VOC BC hosted a half-day workshop for 35 executive directors and voluntary sector leaders.

Participants identified the competencies that were most important to them and used the Spectrum of Learning tool to identify how they would learn each competency.

When the organizer, Tim, and a young woman from the community connected, people called it ‘magic’ and ‘inspirational’. Tim and the woman had suddenly seen how they could support each other and they did not want to stop sharing their ideas and questions. People began to understand that learning was their own responsibility and that they had some power over shaping their own future.

For the young person she realized that she was able to take off from where she was. She had values, skills and knowledge that was recognized and valued by Tim; she only had to move forward. She asked him to be her mentor.

Several months later, Tim still identified the fact that he had a mentee-mentor relationship as the most wonderful aspect of the project for him. His work has been energized and he is full of new ideas and confidence. He described this mentoring relationship as ‘two-way’, he had definitely learned as much from his ‘mentee’ as he had been able to give to her.

– Diana Smith



We respect and value all ways of learning and can find it in many places – a complete spectrum is available and accessible.

This is the Way We Want to Be

Participants identified many different ways that they are learning to lead. These included peer learning and mentoring.

“Learning is flexible (timing and delivery), accessible, inclusive, and builds networks.”

I learn by doing and working together. I have been so inspired working with interns – mentoring these young people is what is giving me the most pleasure in my job right now. Building the relationship right is so important and is the basis of good mentoring. It is important to engage and involve youth in our sector, they have such wonderful values and commitment. They just need to be supported and mentored in order to do well.

– Participant in the Appreciative Inquiry interview process

“Learning includes different values, cultures, and perspectives.”

“Spiritual and developmental needs of people are included in learning.”

“A peer mentoring culture [needs to be] fostered in the sector and organizations.”

“It is important to support co-op students and interns...we can all learn from each other.”

“Leaders are modelling the learning.”

A ‘spectrum of learning opportunities’ is a term that we heard from several participants. There was no one type of learning opportunity that emerged as critical or as the most important. Participants supported the availability of a complete spectrum of learning methods and opportunities, accessible for different types of learners and organizations.

“There is a spectrum of learning opportunities (formal and informal) that recognize different styles and needs.”

“There is a provision of new opportunities and/or growth for emerging leaders.”



Leaders shape their organizations into learning organizations and are transforming the sector into a vibrant learning culture.

This is the Way We Want to Be

Learning from Each Other Through Dialogue

During a dialogue on ‘Vulnerability: Walking the Fine Line Between Mission and Survival’, one of the participants described a fax blitz day in which all of the organization’s staff and volunteers faxed their government representative.

Another participant shared her belief that government staff and politicians were people like her – individuals who wanted to make the world better and had chosen to do this by going into the government sector because they believed that this is where they felt that they could make change happen. She called them “my friends and colleagues” and stated that she would always talk to them first and treat them respectfully, before she spoke to the media and before taking radical action.

A third participant, who had worked for 25 years in community development, reflected that she had never considered that government was comprised of people that she could talk to and collaborate with. It was a very profound, caring and respectful dialogue that sparked conversation and actions.

Another participant shared her deep despair about the impact of provincial cuts on the community members her agency served. She wondered if she and her agency were being complicit by agreeing to changes in their contract with government that would undermine the values of the agency and hurt community members. She wondered if her work still reflected her values. She said that as a result of the dialogue, she realized that the client and the community was why she was doing the job she was doing. She was willing to think about resigning because she no longer felt she was serving the needs of client or community.

- Leslie Kemp

When we asked participants about learning, they did not focus on individual learning as much as they focused on sharing the learning throughout their organizations (‘organizational learning’). Good policies were also identified as important.

“Workplace learning is important.”

“Organizations need to be learning cultures where growth is encouraged.”

“There is a strong focus on internal and cultural transformation [in organizations.]”

“Support from the employer in the form of policies and practices, funding, time off, and linkage of new learning to the challenges and goals in the workplace brings meaning and impetus to building a learning culture.”

We learned that leaders in the voluntary sector are not just interested in individual and organizational learning – they also focus on sectoral learning. By enabling everyone to learn together and from each other, we all become richer.

“Learning is collaborative in the sector, i.e. there are concrete incentives for cooperative versus competitive models for building the voluntary sector.”

“There is permission in the sector and public for learning and there is time, funds, and space for reflection and creativity.”

“Innovation is encouraged in the sector and there is tolerance for mistakes.”

“Structural challenges in the sector related to learning are addressed (eg, buy-in from boards, funders, public for learning, work-life balance, women’s issues, human rights).”



Post-secondary institutions, funders and the sector (and its sub-sectors) are leveraging their resources and, together, are learning to make the world a better place.

This is the Way We Want to Be

Learning was not just seen as a voluntary sector issue but also as an extra-voluntary sector issue – participants spoke about the critical need for funders, post secondary institutions and corporations to learn *together*. That is, they have a strong belief that the world will be a better place by enabling the voluntary sector to learn together with other sectors.

Two funders agreed to support the expansion of the dialogue with the purpose of building community capacity, particularly with vulnerable organizations. They were convinced of the needs articulated by the *Learning and Leading* Project and assigned staff to participate in the initiative. One funder expedited a special funding approval process so that a working committee, with VOC BC and Langara College at the core, could begin to develop and organize follow-up events.

We were inspired by the leaders who participated in this process. It is clear that other sectors are also inspired by voluntary sector leadership. They see voluntary sector

The public post-secondary institutions must revive their ideals. They need to recollect the foundational principles that individuals held in their creation – that is to serve as vehicles for the pursuit of personal and community hopes and dreams.

They have succeeded far beyond expectations in becoming repositories of expertise, history, resources and learning; directly because of the continuing generosity of the community that still has great faith in their role as champions of a learning and changing democracy.

It is imperative these institutions flow the benefits that they have insatiably received back to the community through the voluntary sector.

- Doug Soo

leaders as powerful and influential and are inviting them into their workplaces in order to inspire their own workers.

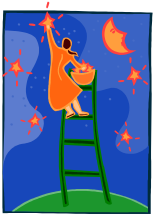
“Leadership needs to be seen holistically (not just individualized training). Leadership is more than just individual within an individual organization – the broader community, including colleges and businesses, needs to accept a “learning culture”. The sector needs to focus on the development of social capital and vision (organizations are a means to an end).”

“Snowball effect...cross pollination...shared learning community...cross sector collaborations.”

“All of the sub-sectors – arts, sports, health, social services, etc. – are learning from each other.”

”I am excited about using the *Learning and Leading* participants to inspire my staff to look at how we do business.”

“By including voluntary sector staff in my training, I am enriching my staff, my workplace and my community.”



Working in the voluntary sector is the career of choice in Canada.

This is the Way We Want to Be

As long-term voluntary sector professionals we saw that working in the voluntary sector was the career of choice for most of the *Learning and Leading* participants. This message needs to be spread far and wide.

“There is a public perception of voluntary sector work as a career and profession.”

“There is a vision of growth and opportunity within the sector.”

“There are improved public perceptions about learning that could help our sector.”

Exploring how to overcome barriers to learning to lead



There are no barriers to learning.

This is the Way We Want to Be

It has become clear that learning is happening everywhere. Individuals are learning formally, informally and ‘non-formally’. Organizations are becoming learning organizations and are learning together with others in the sector. Extra-sectoral learning is starting to happen. Despite this, barriers to learning exist. More work is needed to reduce these barriers. We especially need to understand barriers to learning for small organizations that serve vulnerable populations.

“Other ways to support learning were identified: More time off, reduced workweek, time for deep, personal reflection, looking at what inhibits leadership (attitudes, policies & practices).”

“Lack of money and time are the most cited obstacles to participation in continuing learning.”

“Accessibility and affordability issues need to be addressed with flexible delivery that reflects the multiple demands placed on the contemporary worker in the voluntary sector.”

“Funding and other resources need to be made available for traditional and informal learning.”

In 2004, the Centre for Voluntary Sector Research and Development (CVSRD) surveyed 600 voluntary sector leaders Canada-wide to explore Working and Training. In response to the CVSRD’s question, “Educational institutions report that more people from the voluntary sector express an interest in having a workshop or program take place than actually register for it. Why do you believe this happens?” 19.6% reported that there was no time due to a heavy workload and no staff to cover, 18.3% reported that this was due to cost, time and no support from employer, and 10.4% reported that there was different competing demands/priorities. Other factors such as location, format, quality/ appropriateness and incentives were not considered to be a significant barrier to learning.

A recent study of 34,000 Canadians about Working and Training⁷ showed that one third of Canadians participate in education and that cost is the number one barrier to participating in education. The survey also showed that 70% of employees received training support from their employers. At the June *Learning to Lead* workshop, financial considerations were identified as a key barrier for participants (many of whom were from small to medium-sized organizations that serve vulnerable populations) in accessing learning opportunities to support leadership development.

⁷ Working and training: First results of the 2003 Adult Education and Training Survey (AETS) – by Valerie Peters, Statistics Canada, 2004.

Exploring New Roles...

Exploring New Roles for Post-Secondary Institutions

The National Learning Initiative developed an inventory of formal training programs offered by the university and college sector, as well as training provided by the voluntary sector. More information needs to be gathered about formal courses, informal programs and services, and other training organizations. Issues around articulation, transferability of credits, prior-learning assessment and recognition, and distance learning were discussed but action plans have not yet been developed.

Over the past two years, several important studies on education and training have been undertaken.⁸ These need further study and action.

Participants in the National Learning Initiative held a strong belief that learning was critical for the voluntary sector and that there needed to be change *within both the educational and voluntary sectors*. A new role for post secondary institutions needs to be explored.

As a result of the *Learning and Leading* initiative, Langara College has deepened its relationships with key organizations in the voluntary sector and forged new relationships. The partnership with VOC BC has enabled Langara to reach out to a diverse and broad network of voluntary agencies in BC with whom it did not have previous relationships. The dialogues, interviews and workshops increased opportunities for a range of organizations in the sector to access resources from Langara College.

Forces of change will put us out of business unless we act differently. Over the past couple of years there has been a great deal of research and many conferences that identify the next wave of students - contemporary students see themselves as consumers rather than as hoop jumpers. Research tells us that we need to become more competitive in this changing environment; yet, we are locked into institutionalized thinking. Education is about changing individuals and community and if we can't change our own institution, we're in trouble.

We have a wave of people ready to retire, so they won't change, but the rest of us can learn from the voluntary sector. I don't want us to fall victim to doing 'business as usual', yelling and screaming that 'we're doing good work'. I want us to focus on demonstrating by action, learning from the community and inspiring people throughout the college to get on board.

Our President and executive are completely supportive, this will be important as we move forward. We need to invest in being relevant; colleges must allocate time, resources and space to engage with community.

Learning and Leading will bring capability to the college, it has already given us guidance about how to develop Continuing Studies and throughout this process, we are being seen as interested and relevant to the community, not aloof. I hope that Continuing Studies will inspire other departments to adapt Learning and Leading to their own communities of learning.

- Doug Soo

⁸ In 2004, Statistics Canada published their survey of 34,000 Canadians about Working and Training⁸. They reported that one in three adult Canadian workers participated in formal job-related training in 2002; most workers who participate in informal learning also involved themselves in formal learning; and the more educated and younger the worker, the more likely that individual will participate in formal job-related training. Additionally, the CVSRD survey reported that leaders in the voluntary sector are generally well educated: of 572 respondents Canada-wide 24.5% have a college certificate, 36.7 have a Bachelor's degree, and 26.9 % have a Masters degree, 21.9% have other qualifications. 89.8% believe that specialized or customized educational opportunities can benefit the sector. 52.5% chose 'leadership' when asked in what areas they would like to receive special education or training, and 60% chose leadership when asked what the sector needs. In both cases, leadership was chosen above any other category.

The college has integrated its role in supporting learning and leading in the voluntary sector into its program and staffing structure. Learning opportunities will be offered only based on expressed interest and need from the community. They will also be delivered with flexibility, access and expertise reflective and respectful of the complex challenges of learning to lead in the voluntary sector.

As a result of the dialogues, Langara received phone calls from three organizations in different communities asking if Langara would organize similar dialogues. In addition, other colleges (Malaspina and Fraser Valley) have expressed an interest in collaborating with Langara in programs for the voluntary and nonprofit sector.

Langara College is learning to be a leader as defined by the NLI competencies. Continuing Studies staff members have established their own learning community and we believe that our partnerships with the community and voluntary sector have made our work more valuable.

- Doug Soo

Langara is exploring ways in which the college can help address the learning needs of voluntary sector workers. Langara is committed to continuing to work in partnership with voluntary organizations in developing learning opportunities that are responsive to the community's needs. More importantly, the college is mindful of the importance of listening to community perspectives in its development and delivery of curricula.

Langara is developing learning programs that will provide credit to the learner, if desired, through participation in an annual summer school, courses, on-line courses and networks, experience-based learning, and special projects.

The NLI competencies will be used, where appropriate, in the design of these programs and in specific learning opportunities for people engaged in voluntary sector and community development work, locally and globally.

As a specific follow-up to this project, Langara is committed to working with VOC BC and other key organizations to organize a *Learning and Leading Exchange* involving established and emerging leaders from a number of community and regions in BC. The *Learning and Leading Exchange* will build on the foundation that has been established in the Learning and Leading initiative.

A commitment to the formal learning sector

Generally colleges and universities have shown little indication that they are serious about civil society and the social economy. Yes, they talk about it. Most have no centre of excellence, no core faculty, no leadership, no programs, professors or expertise. Very few people at the university level have this expertise and it is not fostered despite all of their rhetoric.

This project reinforced my commitment to both concepts, and of fostering and integrating them throughout the universities. Langara College is beginning its transformation and other post-secondary institutions need encouragement to follow their lead.

- Diana Smith

We have found that learning is contextual. No longer can we look at simply providing training in a one size fits all mode. We need to think about how we provide learning that is relevant to people's needs, circumstances, organizational settings, communities, etc . We need to be flexible and learner-based rather than curriculum focused in terms of how we "deliver" learning opportunities.

- Leslie Kemp

Exploring New Roles for Funders

Funders in British Columbia are beginning to reflect deeply about their role and responsibilities in the development of leadership in the voluntary sector. The sector is rapidly changing and becoming more complex. Many leaders will retire soon and there are few up-and-coming leaders. The competencies required by voluntary sector leadership have changed and ways of learning have changed. The roles and responsibilities of educational and training institutions are changing, and there are barriers to learning. Clearly, the role of the funders and how this integrates with other roles need to be explored – now.

In BC, progressive funders have moved into the forefront of this movement to enhance leadership in the voluntary sector. United Ways, local foundations and community colleges throughout BC are beginning to identify voluntary and post secondary sector leaders to work together locally to develop an enhanced learning culture. Two funders – the United Way of BC and Vancouver Foundation – are providing leadership in this initiative.

The Centre for Sustainability has been established as an important access and referral point for tools and resources dedicated to organizational capacity building in the voluntary sector throughout BC. Established by the United Way of the Lower Mainland and the Vancouver Foundation, the Centre believes that the non-profit sector would benefit from a coordinated and enhanced approach to the development and delivery of technical assistance. They are keen to provide on-going leadership to funders, post secondary institutions and voluntary sector leaders who are working to develop community learning collaborations.

Exploring New Roles for Corporations

In the *Learning and Leading* initiative we encountered an extraordinary corporation that has been committed to learning and leading for several years: VanCity Credit Union, recently awarded the ‘best company to work for in Canada’. They have developed a Community Mentors program, workshops on topics such as the new Privacy legislation, and other services that will support and strengthen the voluntary sector in their communities. In taking on these activities, VanCity believes that they are strengthening their own staff, as well as their business and their community.

We believe that there are many other corporations that could do similar work and receive similar benefits from the community if they were inspired to participate in this collaborative learning culture. This would certainly benefit small organizations that serve vulnerable populations as well as others.

This is an area that deserves attention in the future. There are many more far-sighted corporations that have much to share with, *and learn from*, the voluntary sector.

A Corporation Shares its Resources

VanCity's human resources programs are the best in Canada, it costs us nothing to share. By sharing this training with members of our community, we are improving the human resources program. Our staff's lives, personally and professionally, are enriched by working with the charity sector. We are learning from our community and we are enriched as individuals and as a business.

- Detlef Beck, VanCity
Credit Union

Exploring a New Role for Leaders of the Voluntary Sector

VOC BC Steering Committee member, Tim Beachy, was an integral leader in the *Learning and Leading* process. Under his guidance, the groups that are served by VOC BC became engaged early in the process and are significant leaders of *Learning and Leading* province-wide. Tim sums up the project in this way.

The BC Environment

Governmental shifts in policy, structures and funding set a tone of heightened tension and competition amongst voluntary sector organizations for decreasing resources. We found a high level of adjustment and competitive behaviour with many leaders feeling isolated and lonely and exhibiting less adaptive leadership – this became apparent at the dialogue at a VOC BC session and at a Co-op AGM.

This situation presented us with a fertile ground for learning about leading by presenting and discussing the competencies in naturally occurring events sponsored by us and others – using our viral approach to advantage.

Cultures and Learning

Every organization has a culture and every culture has natural and imposed learning systems. In our environment we could observe negative learning cultures – staff learning negative and non-adaptive behaviour from their formal leaders and from peers inside and outside their work place.

A ‘viral’ approach to learning works into an organization’s culture through cultural change agents rather than through formal decisions of leaders (who are dependent on keeping the current culture). I believe this added tremendous potency to our approach – we did not so much invite people to learn about leading, rather, we showed up in their environments and dialogued about competencies. Dialogue became the currency of cultural change and hopefully of a more adaptive learning environment for staff.

Learning in Situ

One of the good things about the ‘viral’ approach was the attempt to more closely tie learning about competencies directly to immediate circumstances. This was less structured than other approaches but was more open to mentorship, coaching, and of leading others through a process, e.g., Doug Soo sharing the NLI competencies with some boards of directors and facilitating dialogue about them.

Instead of us having to document our outcomes, we could focus on their outcomes – their own organizational and personal goals. Doing this ‘virally’ requires humility and an awareness that our performance is relative to the urgency, scope and depth of their goals and immediate needs. In these settings, learning is not about the teacher “being the best teacher” but about learners making change in new and positive ways.

Learning and Leading at the Margins

Much of the work of leaders in the sector is NOT leadership work but related to management, direct service, project management and bureaucratic requirements. For many, “leading” others is episodic. The increasing orientation toward cost cutting, accountability to external bodies, program accreditation, reporting related to regulatory requirements and complicated organizational infrastructure seem to reduce organizational “leadership” to writing great responses to Requests for Proposals. These cultures are oriented to learning and practising non-leadership roles.

Our ‘viral’ approach allowed us to focus learners on transforming their environment to make leadership possible. This is different from gaining and then applying new leadership competencies. This is about leaders forcing organizational change before they have the competencies to deal with the changes; then relying on their ability to learn quickly at the very edge of precarious new things (just in time); then using their “learning skills” to model leadership to others. Sometimes it works, sometimes it doesn’t, but the behaviour of dealing with change in a learning mode is a leadership role in itself. Risking much for organizational health is a place to start.

Into the Future

Learning and Leading is spreading like a virus. This initiative has seeded the development of a *Learning and Leading Exchange* where established and emerging voluntary sector leaders, together with representatives of United Ways, community foundations, post-secondary institutions, and innovative corporations will engage in ongoing learning about leadership. ‘Learning pods’ from communities around the province will form to share their learning with others locally and with other pods in different communities and regions. We are inspired about the possibilities of this new initiative.

We believe that *Learning and Leading* can be adapted by colleges and voluntary sector organizations in other communities and provinces. Post-secondary institutions, funders, corporations and governments can learn from the voluntary sector – they can partner with voluntary sector organizations to initiate change.

This process demands of participants that they:

- have a high tolerance for ambiguity
- be adaptable (this process is messy)
- have the capacity to hold onto the enormity of what they are doing
- be determined not to butt heads or compete

We focussed on what could be possible. We gave ourselves permission to fail, and this gave us the freedom to create. We were not locked into the ‘management-by-objectives’ approach. We did not predict where the process was going to take us. We were not attached to *outcomes*; we focussed on our *commitment* to the process. By placing a stronger value on our commitment than on some pre-decided outcomes, we were able to deal with the ambiguity of the process.

Accountability, for us, was to bring the best of ourselves to the table each time. We were not accountable for achieving what we set out to do six months earlier and we were not on a train travelling to a predicted outcome.

And importantly, this process requires organizations who are willing to take risks and to commit financial and organizational resources. Langara College and VOC BC took a risk. They committed resources. And as a result, the voluntary sector in British Columbia benefited.

Our Conclusions

During 2004, the Voluntary Organizations Consortium of BC and Langara College worked together to achieve the following:

- Over 250 established and emerging voluntary sector leaders in BC reflected on the competencies needed for coping with the complex challenges they face. Some emerging leaders are beginning to feel more supported and many established leaders have been re-energized.
- Many of these leaders increased awareness of their competencies and identified areas for self-development. Several told us that they were using the NLI competencies to work with their staff to help identify, in addition to individual needs, organizational priorities for group competency development.
- The Spectrum of Learning Tool was developed to help individuals identify personal priority competencies and *how* they learn each one.
- Key representatives of voluntary sector organizations, post secondary and training institutions, corporations and funders came together and significantly increased their understanding of how leaders learn, and how to nurture and develop new and emerging leaders in voluntary sector organizations.
- These people are committed to further exploring these ideas through the creation of a *Learning and Leading Exchange* to create opportunities for leaders throughout BC to share their successes and challenges.

We are beginning to see a shift in the culture of learning in BC:

- Several organizations have committed to participate in learning initiatives and to work collaboratively with Langara College. Langara College has forged new partnerships and deepened its existing relationships with voluntary sector organizations.
- VOC BC is providing leadership in facilitating and supporting learning and leading province-wide.
- The Centre for Sustainability has become actively engaged and is helping to facilitate this process.
- There is a more committed institutional response from Langara College and other post-secondary institutions, with an emphasis on ongoing and sustainable actions and activities. Other educators and training institutions have expressed interest in engaging with Langara to develop *Learning and Leading*.
- As post secondary institutions engage with the voluntary sector, learning is happening in ways other than those traditionally offered by colleges and training institutions.
- There is an increased understanding and deeper relationship among providers of education and training (especially Langara College), voluntary sector organizations (especially VOC BC) and funders (especially the United Way of BC and Vancouver Foundation). In addition, we have started to engage interested corporations, such as VanCity.

By the end of 2004, we have achieved these goals and the process is spreading across British Columbia. Funders, educators, corporations and the voluntary sector are exploring new roles.

We have developed five tools to share with other organizations and institutions across Canada:


- Tool #1 – A competency self-assessment process and self-identification of learning styles required for each identified competency.
- Tool #2 –The Way We Want to Be: A Discussion Tool
- Tool #3 – Appreciative Inquiry interviews
- Tool #4 – A Dialogue Tool with three suggested topics
- Tool #5 – A Day on Leadership, including popular education tools to discuss leadership competencies and identify ways to learn how to be a leader

By stating **The Way We Want to Be** (the provocative propositions) for the voluntary sector, we have defined a vision for *Learning and Leading* in the voluntary sector in BC.

We need to continue to work together to achieve this vision. This requires taking risks, forging new relationships, and trying new things – and as we have learned, the voluntary sector does these extraordinarily well.

A Travelling Troubadour's Bag of Tools

to enhance the culture of learning in your community

I feel like a travelling  adour. I've felt the magic of Learning and Leading and now I am travelling the countryside with my bag of tools sharing it. There is real joy in this work – I focus on what's right instead of what's wrong. I bring tools and activities that inspire individuals to learn that they are leaders with power and influence.

- Tim Beachy

A Travelling Troubadour's Bag of Tools

Can you describe the voluntary sector this way?

- The voluntary sector is powerful
- Leaders are competent
- Learning is flourishing everywhere
- Learning and leading are happening, now

If not, here are some tools to engage your community in learning and leading:



- Tool #1 – A competency self-assessment process and self-identification of learning styles required for each identified competency.
- Tool #2 –The Way We Want to Be: A Discussion Tool
- Tool #3 – Appreciative Inquiry interviews
- Tool #4 – A Dialogue Tool with three suggested topics
- Tool #5 – A Day on Leadership, including popular education tools to discuss leadership competencies and identify ways to learn how to be a leader

Tool #1



A competency self-assessment process
and self-identification of learning styles

Tool # 1 - A competency self-assessment process and self-identification of learning styles

Identifying personal, priority Competencies for Learning

The National Learning Initiative identified competencies of leadership in the voluntary sector in Canada: **Voluntary Sector Leadership Competencies Profile**. See www.vsi-isbc.ca/eng/hr/pdf/nli_brochure.pdf for more information. NLI groups these competencies into five sections:

1. Aspiration and Alignment
2. Strategies and Resource Management
3. Relationships
4. Complexity
5. Belief and values

Use the following pages to identify your personal learning needs. Rate each competency on the attached list, with one of the following:

- I have this competency (“have”)
- I am okay at this competency (“okay”)
- I want to learn this competency (“want to learn”)

Then use the accompanying charts to analyze your learning needs, styles and outcomes for each “Want to Learn” item. Work with several others who share the same need.

A. Aspiration and Alignment

The competencies in this core area relate to improving life in the community and the world. They enable leaders to achieve the noblest aspirations of the sector – peace, freedom, human rights, opportunity, safety, justice, and removal of poverty and discrimination – while sustaining its leadership in community-based, inclusive and visionary work.

Leaders with these competencies excel at building support for a vision in a world of multiple needs.

| Have | Okay | Want to Learn | Competency |
|------|------|---------------|---|
| | | | Lead effective and innovative public action |
| | | | Be engaged with development of public policy |
| | | | Guide development of and commitment to a vision |

| | | | |
|--|--|--|--|
| | | | |
| | | | Lead organizations through a structured decision making process to resolve ethical issues and value-oriented issues and dilemmas |
| | | | Optimize external relations |
| | | | Lead action on global issues |
| | | | Sustain a culture of learning |

B. Strategies & Resource Management

The competencies in this core area relate to maximizing day-to-day operations through sound and ethical management practices.

Leaders ensure that management practices are responsibly carried out in the best interest of the organization, enabling it to operate efficiently.

| Have | Okay | Want to Learn | Competency |
|------|------|---------------|---|
| | | | Optimize diverse, effective and ethical fund raising approaches |
| | | | Optimize financial stewardship |
| | | | Sustain a culture within their organization where innovative ideas are nurtured and individuals are inspired to find creative solutions to complex problems |
| | | | Lead diverse marketing and PR processes |
| | | | Optimize information technology solutions |
| | | | Optimize research and its application |
| | | | Lead responsive and inclusive planning and evaluation processes |

C. Relationships

The competencies in this core area relate to developing the capacity at all levels to work effectively with people to achieve shared vision, to build effective interpersonal relationships, engage and empower others, and to enable the best of what is possible through human interaction.

Leaders with these competencies establish and maintain positive relationships with appropriate people at all levels within and outside of the organization. They build and effectively use a network of relationships, which fosters collaboration, a climate of trust and resolve. In this core area, leaders need to be able to:

| Have | Okay | Want to Learn | Competency |
|------|------|---------------|---|
| | | | Optimize interpersonal relationships |
| | | | Optimize human resources |
| | | | Sustain quality approaches to team development |
| | | | Demonstrate political acumen or savvy |
| | | | Successfully represent, as a public persona, the interests, ideas and views of the organization |
| | | | Optimize the individual-organizational-community relationship |
| | | | Excel at appropriate and effective oral and written communication |
| | | | Optimize the use of all communication technologies |
| | | | Build organization and community by developing shared strategies among diverse talents, cultures and assets |
| | | | Develop creative approaches to local issues while maintaining global perspectives and vice versa |

D. Complexity

The competencies in this core area relate to leading voluntary organizations in a complex, interdependent world where the organizational, political, social and institutional environment is undergoing unprecedented change and turbulence.

The focus of the leader is on discerning the patterns of relationships, how they are sustained, how they self-organize and how outcomes emerge in a context that is frequently unpredictable, not merely unknown but unknowable. The leader is flexible, adaptable and creative as the context continually changes, and is able to work with paradox and tension.

| Have | Okay | Want to Learn | Competency |
|------|------|---------------|--|
| | | | Ensure multiple accountabilities |
| | | | Demonstrate interdependent perspective in a complex system |
| | | | Demonstrate awareness of the environment, assessing contextual systems and structures, economic systems and structures |
| | | | Integrate systems theory and thinking to organizational leadership |
| | | | Sustain a culture that celebrates creative decisions and innovative strategies |
| | | | Sustain a healthy environment |
| | | | Excel at both cooperation and competition |
| | | | Create the conditions that encourage people and systems to change and adapt |

E. Beliefs and Values

The competencies in this core area relate to individual beliefs and values that influence individual, organizational and sectoral actions. These competencies are a strong basis for the voluntary sector and often set it apart from other sectors.

The focus of the leader is ensuring that beliefs and values are always focused on better society and leaders may have reconcile their own personal beliefs and values with those of others and/or their organization.

| Have | Okay | Want to Learn | Competency |
|------|------|---------------|---|
| | | | Believes in social responsibility and inspires others to be socially responsibility. |
| | | | Understands the importance of sustainability and self-sufficiency and incorporates these principles into their personal and professional activities |
| | | | Builds capacity of individuals and organizations |
| | | | Has ethical and principled behaviour. |
| | | | Believes in and implements inclusion and diversity appropriately. |
| | | | Uses passion and compassion appropriately. |
| | | | Has courage and uses it well. |

From the lists of competencies, check the areas where you have a ‘need to learn’:

Competency Area #A: Aspirations & Alignment:

Specify your ‘Want to Learn’ choices:

Competency Area #B: Strategies & Resource Management:

Specify your ‘Want to Learn’ choices:

Competency Area #C: Relationships:

Specify your ‘Want to Learn’ choices:

Competency Area #D: Complexity:

Specify your ‘Want to Learn’ choices:

Now choose the **top five competencies** that you **want to learn**:

- 1.
- 2.
- 3.
- 4.
- 5.

For EACH of these competencies, fill in the table on the following page. (Photocopy these pages before you begin.)

Getting more detail on each of my priority competency needs

(Photocopy these pages before you begin – one copy for each competency you identified as Want to Learn.)

For **each** of the top five competencies that you identified as **want to learn**, fill in these tables.

1. Competency outcome: specifically identify what this means for you right now – what you'll be able to do. Write an outcome statement, "Upon mastery, I will be able to:

2. Why is this important to you, as a leader?

3. Why is this important to your organization?

4. To achieve this outcome within my current context, I need to assess:

| My expertise (skills, knowledge, experience, understanding) | My priority needs for learning (Do I need information, skills or understanding?) | My resource opportunities & limitations (time, money, people, etc.) | Success indicators — (list objective measures of achievement; match up with outcome statement) |
|--|--|---|--|
| | | | |

The Spectrum of Learning Options

In this section, you are going to identify the ways that you feel is most right for *you* to learn each of the priority competencies you identified for yourself. Today, there is a multitude of ways to learn. Choosing the “right” learning options for you, i.e., the ones that “fit” into your life and that specifically address your learning need(s), is critical to optimizing your learning. Below, find a brief overview⁹ of the various types of learning options. Just being aware of these is an important step toward making good decisions for your individual competency-based learning plan.

⇒ Options that help you obtain **information/content**:

| Option | Examples | Explanation |
|--------------------------|---|--|
| An expert | lecture, conference, workshop, seminar | In real-time and face-to-face (f2f), where there’s an opportunity to ask questions |
| Print | written notes, text books, articles | Either available in hard copy or via electronic download |
| Multimedia presentation | slideshows, lectures, video and audio clips, animations | Usually ‘stand alone’ electronic resources available on CD or via download |
| Learning activities | Simulations, experiments, case studies, scenarios | Structured; usually in a more formal learning environment, either electronic or f2f; usually small group or individual |
| Interpersonal activities | discussions, debates, question & answer sessions, collaborative exercises | Group size and formality varies according to purpose / content |
| Feedback | formative learning tasks/assessments | Can be both electronic and f2f |

⇒ Options that encourage you to **communicate with others**, both instructors and peers:

- Asynchronous (not at the same time) means – electronic bulletin boards, virtual discussion groups, listservs, e-mail
- Synchronous (same time) means – teleconferencing, videoconferencing, chat lines, face to face meetings/discussions

⇒ Options that help you **deepen your understanding** of essential concepts and their relevance to your organizational responsibilities, best achieved through learning activities that require you to:

- Reflect – self-assessment, instructional questions, learning journal, web logs, portfolios, etc. These activities involve critical analysis, contemplation of consequences, and evaluation of information and

⁹ Please note: (i) The definition of educational terms varies; (ii) Overlap of options is intentional.

skills. They facilitate deep learning, the transfer of knowledge to new situations, and the development of learning to learn skills.

- Assess your learning relative to your work – simulations, scenarios, debates, case studies

⇒ Options that **enhance your ability to use your knowledge and develop necessary skills**, best achieved through activities that require you to:

- Apply newly learned information – practical activities such as experiments, simulations, observations, self-tests, active inquiry, scenarios, case studies, problem-solving, etc.
- Perform – some type of practical assessment, measured

⇒ Options that ensure you **receive recognition** for your learning achievement:

- A formal learning environment — a program, course, workshop — options that require you to register, to follow a pre-determined schedule of learning activities, and to be assessed against pre-determined learning outcomes/objectives
- An informal learning environment — alongside a colleague or mentor, a best practices discussion, a working group, etc. To be recognized, your learning achievements need to be authorized and formally documented relative to your performance expectations

Learning How I Will Learn These Competencies

Next, please think about the types of learning strategies/options you'd prefer to pursue relative to each competency. (Photocopy this page before you begin – one for each competency that you have identified as 'want to learn'.)

For this competency: _____, this is how I will learn:

| I want.... | Importance (check) | I'd prefer to..... (check all those that apply) |
|---------------------------------------|---|--|
| Information | 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> very somewhat not not at all | Access information via: <input type="checkbox"/> An expert <input type="checkbox"/> Print <input type="checkbox"/> Multimedia <input type="checkbox"/> Learning activities <input type="checkbox"/> Interpersonal activities <input type="checkbox"/> Feedback |
| To discuss/debate with others | 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> very somewhat not not at all | Communicate with others (instructors / peers) via: <input type="checkbox"/> Asynchronous means <input type="checkbox"/> Synchronous means |
| To deepen my understanding | 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> very somewhat not not at all | Participate in learning activities that require: <input type="checkbox"/> Reflection <input type="checkbox"/> Assessment |
| To apply my knowledge / develop skill | 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> very somewhat not not at all | Participate in learning activities that: <input type="checkbox"/> Are practical / hands-on <input type="checkbox"/> Assess your performance |
| To receive grade/ credit/ certificate | 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> very somewhat not not at all | Learn in: <input type="checkbox"/> A formal environment <input type="checkbox"/> An informal environment |

Other comments and perspectives:

Tool #2:



The Way We Want to Be: A Discussion Tool

Tool #2: The Way We Want to Be: A Discussion Tool

Let's start from a vision of the ideal future rather than fixing what's not working well.

In 2004, leaders from the voluntary and post secondary sectors in BC identified a vision for learning and leading in the voluntary sector. Rather than trying to fix what's currently happening, start from this vision and then identify what needs to be developed in your community to make the voluntary sector powerful and influential, to have competent leaders of all ages throughout the sector, with learning happening everywhere.

Instructions

Invite a diverse cross-section of leaders from your community – voluntary, post secondary, corporate and government sectors – to an afternoon of discussion. With your scissors, cut the provocative propositions below into individual statements. Mix them up. You can be really creative and put them into fortune cookies, envelopes, etc. Divide your large group into small discussion groups or partnerships and give each several provocative propositions. Ask them these questions:

1. **Is this a statement that defines an ideal future?**
2. **Who needs to be involved to make it happen?**
3. **What do these people have to do to make this ideal future happen right now?**

The groups or partnerships should write each provocative proposition onto a flip chart with the answers to each question below the proposition. Tape these flip chart sheets on a wall. Ask the participants to start identifying themes that they see in the answers. Post these on a larger Master Sheet, cross them off the individual flip charts as they are put onto the Master Sheet. Check through the individual flip charts to see if any of the remaining information is critical, if so, don't lose this. Refine the work on the Master Sheet – this should identify who needs to be involved and what they need to do in order to develop and enhance learning and leading in your community. Good luck!

Provocative propositions

(cut into individual statements)

The sector is vital, healthy and productive.

The sector is evolving and emerging in a powerful way.

The sector is full of leaders who are shaping the future.

Voluntary sector leadership is valued and distinct from government and corporate sector leadership.

Working in the voluntary sector is the career of choice in Canada.

Individuals have the full complement of competencies required to lead the voluntary sector, now and in the future.

Individuals of all ages are engaged in and valued as leaders of the sector.

Leaders achieve their organization's mission, contribute to their community's well-being, and influence global issues.

Leaders are wise and reflective.

Leaders are collaborating efficiently and effectively.

Leaders balance complex dilemmas and multiple accountabilities.

Leaders maintain a holistic perspective, balancing self care with care of their organizations and the world

We can find learning in many places; it is ours to initiative and ours to keep alive.

We value all ways of learning and a complete spectrum is available and accessible

Leaders shape their organizations into learning organizations and are transforming the sector into a vibrant learning culture.

Post secondary institutions, funders and the sectors (and its sub-sectors) are leveraging their resources and, together, are learning to make the world a better place.

There are no barriers to learning.

Together, we are implementing this vision now.

Tool #3




Appreciative Inquiry interviews

Tool # 3: Background and Overview on Appreciative Inquiry

What is Appreciative Inquiry?

Appreciative inquiry (AI) is a strategy for purposeful change that identifies the best of *what is* in pursuing dreams, and possibilities of *what could be*. It is a cooperative search for the strengths, passions and life-giving forces that are found within every system – those factors that hold the potential for inspired, positive change. Appreciative inquiry is:

- A way of looking at the world and a methodology for working with organizations
- Based on discovering the best of what works through structured questioning
- Based on reality that people are highly motivated by their own stories and images of success
- Widely applicable to diverse organizations and situations, yet each inquiry becomes unique because it grows from the experiences of people in that organization



I learned most from the interviews I did with leaders. These people were inspirational, and what was really neat was that they appreciated the time the interview gave them to reflect on what worked best for them.

- Leslie Kemp

Some Core Principles

- In every organization, *something works*
- What we *choose to focus on* becomes our reality
- There are multiple realities, or ways of seeing things.
- Inquiry is change: the act of asking questions of a group influences them in some way.
- Fear of the futures is reduced when we can *carry forward stories of our success*
- It is important to value differences.
- The language we use is important.

Methodology of Appreciative Inquiry

A full appreciative inquiry process has a number of distinct stages, summarized as:

The 4-D Cycle

Discovery -- Appreciating & Valuing the Best of "What Is"

Dream -- Envisioning "What Might Be"

Design -- Dialoguing "What Should Be"

Destiny -- Innovating "What Will Be"

Appreciative Inquiry principles are adapted and customized to each individual situation; the full AI process typically includes:

1. Selecting a focus area or topic(s) of interest
2. Interviews designed to discover strengths, passions, unique attributes
3. Identifying patterns, themes and/or intriguing possibilities
4. Creating bold statements of ideal possibilities ("Provocative Propositions")
5. Co-determining "what should be" (consensus re: principles & priorities)
6. Taking/sustaining action

Appreciative Inquiry originated with Case Western University – David Cooperrider, 1980, and has been applied to corporations, whole cities (Imagine Chicago, Nanaimo), community development in developing world, etc.

How to have a Great Interview using Appreciative Inquiry

Guidelines for the interview:

There is consensus that the interviewer is to gather information by "just interviewing" the person, i.e. by just asking the questions on the interview form. This should not be a platform for discussion, dialogue, debate, or argument. This is really about identifying the strengths of the person you will be interviewing as well as gathering his/her views/visions/passions and stories related to our community and leadership. Your attitude, going into the interview, is the most important aspect of creating a successful interview. Key components to an effective interview:

- **Curiosity and Genuine Interest.** If you go into the interview with a true desire to inquire and learn about this person, their best qualities and their vision, you are likely to be focused on learning and discovering.
- **Be fully present and listen.** Seek to hear the best qualities in this person; seek to understand why this person is of value in the overall scheme of things.
- **Stay Open, non judgemental.** Avoid forming opinions in your head about what the person is talking about. Expect to discover a real value and asset in this person; perhaps he or she doesn't even know what that is yet and you might help him or her discover that. Go into the interview expecting to be surprised, delighted, and inspired by this person's story. Everyone is an "open book"; the story you get depends upon where you place your focus of attention. Focus and inquire into the best, the strengths, and the possibilities.
- **Ask questions.** As the interviewer, your focus is on asking questions, not sharing your story or offering your opinions. Stay out of the discussion – this is not the place for judgement, blame, problem-solving, etc. Your opinions are not important right here, only your curiosity and focus on the assets, strengths, and information gathering. It is great to ask clarifying questions, to inquire into

the details of their stories in order to bring out the "life" behind the story. Stay with a question until their answer is clear for you. Pay attention to what has heart and meaning in the conversation. Keep in mind our ultimate goal is to bring everyone to the table where they might discover ways to work together successfully. When people feel valued, heard, and worthy, they are much more likely to come to that table.

- **Remember the Power of the Question.** The question will lead your interview in a particular direction. To discover strengths and best practices/visions, your questions need to ask about those. If you ask about problems and solutions, you will spiral into the problem-solving mode, which has the potential to support win/lose scenarios. If your interviewee goes into problem identification, ask a question that taps into the "positive." For example, questions like "What specifically would you like to see or have happen?" or "How will we know we've solved that problem; what will it be like here then?" "What would you do so that doesn't arise?" Questions like these will turn the conversation toward solution as well as provide valuable information about how this person thinks in relation to the issue (his or her interests, desires, passions, etc.)
- **If the person you draw "won't work".** If you cannot be open in interviewing a particular person, don't interview that person. Interview people with an open mind and heart.

Interview Guide and Key Questions

Set the Context:

VOC BC and Langara College are engaging in a one-year collaboration among voluntary organizations and post-secondary institutions in BC to explore how leaders managing and leading in the voluntary sector learn the competencies they need to be effective and innovative in the complex, changing environments we all find ourselves in. We are excited about the potential of this initiative to enhance our understanding and respond to an urgent need to nurture new and existing leaders in nonprofit organizations.

Our focus is on leaders who:

- work in paid management and leadership positions
- are in small organizations and
- especially on those that serve vulnerable populations

Note to interviewer

Review the background on appreciative inquiry and conducting a good interview before proceeding.

The Key Questions:

I want to hear your story and I'll be asking some questions to support that inquiry. [Notes to interviewer are in brackets]



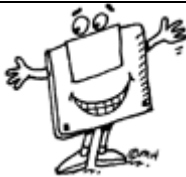
A. Tell Your Story - In your service to your organization and community, there, no doubt, have been high points and low points, struggles and successes; times when your leadership made a difference and had an impact. This is where we will focus.

1. Tell me about a time – a high point in your life - when you were at your best as a leader? What was the situation? What happened? [Listen – jot down notes]

2. What made that possible? [probe: what gifts – attitudes, beliefs, skills, abilities, knowledge were important and present in this circumstance]

B. Learning to Lead - How have you learned to do your job and to be a leader?

1. What learning experiences have been memorable for you? [Explore: affective, cognitive, skills; informal, nonformal and formal]
2. Why were they memorable? [find out if it was because they felt better about their capabilities, they could do something better, they just felt better because they knew more, etc.]
3. What types of learning will be needed in the future in light of the rapid change in the world and our organizations? [Inspiration to be provided by overview of learning in the 21st century - below]

| Learning to Lead in the 21st Century Gaining Perspective | |
|--|--|
| <p>This was then –</p> <p>formal, teacher-centred, content transmission, classroom, books, blackboards, quantitative evaluation</p>  | <p>This is now –</p>  <p>formal, informal, learner-centred, learner needs assessment, competencies, memos, multi-media (includes books, blackboards), collaboration, experiential, just-in-time, face-to-face (includes classroom), at a distance, anywhere/anytime accessibility, workplace learning, re-usable learning objects, prior learning assessment, quantitative evaluation, qualitative evaluation</p> |
| <p>Creating a Learning Culture</p> <p>Drivers of change: technological advances enabling various delivery avenues, arrival of the information and knowledge age, increased value of lifelong learning associated with advancement; more complex needs and demands in the sector.</p> | <p>What will be?</p>  <p>Add to the above – individual learning programs, education brokering/consulting agencies, transferability, institution-specific niches based on core competencies</p> |

Summary of Interview

Note: all personal information will be treated as confidential – contact information is requested, so if we want to use quotes, etc. we can get permission.

Date of Interview: _____

Interviewer: _____

Interviewer's Email: _____

Name of Person Interviewed: _____

Title/Organization of Interviewee: _____

Contact Info for Interviewee

Phone _____ Fax _____

Email _____

Address _____

Postal Code: _____

Interview Summary

1. **What was the most compelling story that came out? What are the important details of that story?**
2. **What is the most quotable quote?**
3. **What was the most life-giving moment for you (one where you felt a surge of hope and inspiration)?**
4. **What personal strengths does this person bring to leadership in the community?**
5. **What key components of learning to lead emerged?**

What trends did your interviewee think were most important?

6. What small step could be made?

7. What larger step could be made?

8. What 1-3 themes stood out for you?

Other Comments:

Tool #4



A Dialogue Tool
with three suggested topics

Tool # 4: The Process Of Dialogue

The Building Blocks (these interlink and reinforce each other)

Suspension of judgment: Opening ourselves up to other points of view, to learning, to different personalities and styles. Moving away from what's right and what's wrong. We can also speak of holding our positions "lightly" as though suspended before us for further examination. This helps to build a climate of trust and safety: as others learn they will not be judged for what they say, they are freer to express themselves.

Identification of assumptions: Uncovering the assumptions, inferences and beliefs that underlie our opinions and judgments. Often incomplete or incoherent assumptions underlie our positions, and when we take time to reflect on these, we free ourselves from ways of thinking that are ineffective. Exploring assumptions also helps us find the roots of disagreements with others, and can be very helpful for working with conflict and diversity in groups.

Listening: Listening is essential and fundamental to dialogue. We need to develop our capacity to stay present in the moment, and to hear at both the individual and collective levels. This involves slowing ourselves down, quieting our minds' chatter, and "freeing our attention" to what is present in the moment.

Inquiry and reflection: Asking ourselves and others questions that lead to new levels of understanding. This can help us gain greater understanding of our own and others' thinking processes. Silence and slowing down can be helpful here too.

Guidelines

- Listen and speak without judgment
- Acknowledge each speaker
- Respect differences
- Suspend your role and status
- Balance inquiry and advocacy
- Avoid cross-talk
- Focus on learning
- Seek the next level of understanding
- Release the need for specific outcomes
- Speak when "moved"

Prepared by Kate Sutherland, based on work by Glenna Gerard and Linda Teurfs in their article "Dialogue and Organizational Transformation", published in **Community Building: Renewing Spirit & Learning in Business**, edited by Kazimierz Gozdz (San Francisco, Sterling & Stone, Inc., 1995.)

A Sample Agenda For A Dialogue

Vulnerability: Walking the Fine Line between Mission & Survival

Suggested Format

Room Set-Up: Chairs in Circle

- 1:00 pm Welcome and overview of session
 Introduce the facilitator and co-facilitator
 Announce the focus of today's Dialogue
 Talk about the Learning to Lead initiative
 Announcements, e.g. about upcoming workshops
 Ask for permission to take notes and/or photographs. Respect wishes.
- 1:10 Brief introduction to Dialogue Process
 Circulate Dialogue handout and briefly discuss the process of dialogue.
- 1:15 Opening question & Intros
 Explain that we would like to open with a round of introductions. Please say your name and how this topic is relevant to you and/or an organization you work or volunteer with. (Introductions can start with whoever feels ready to begin.)
- 1:30 Presentation
 Some key facts/information that are pertinent to this topic.
- 1:40 **Opening Dialogue around the following questions:**
 How does this fit with your own experience as a staff member or volunteer in a nonprofit organization?
 How have you experienced (feel free to reword this)
- 2:30 Break
- 2:45 Dialogue Continues
 Some additional questions may emerge from previous dialogue or pose additional ones such as:
 How have you or your organization learned to deal with this?
 What would support you /your organization in managing this more effectively in future?
- 3:30 **Closing Round**
 We invite you each to share a few reflections on what you have learned from today's dialogue
- 3:50 **Thank you** and please complete feedback/evaluation forms on Dialogue.
 Final reminder of upcoming events

Sample Learning to Lead Dialogues

Developing a Learning Culture in Voluntary Organizations An Invitation... From Langara College Continuing Studies & Voluntary Organizations Consortium of BC

*Open to people working (both new and experienced) in the voluntary / nonprofit sector. Explore these questions and engage in dialogue on these key issues facing the sector. **No charge but please register** by contacting **Leslie Kemp**, Langara College Continuing Studies at **604-323-5981**. **Location:** Langara College, 100 West 49 Avenue, **Room A 218***

Collaboration: What new Capacities Emerge When We Collaborate with Others?

Friday, April 30, 1 – 4 pm, Tim Beachy, Facilitator

“Emergence is the surprising capacity we discover only when we join together.”

*“People organize to do more. We seek out one another because we want to accomplish something. And then life surprises us with new capacities. Until we organize, we can’t know what we can accomplish together.” Margaret Wheatley, **A Simpler Way**, 1999.*

Why do we collaborate – within our organizations and with other organizations? How does collaboration challenge us? And what do we learn through working with others?

Dealing with Complexity in a Changing World: Challenges for Nonprofit Leaders

Friday, May 14, 1 – 4 pm, Diana Smith, Facilitator

*“**Complexus**, the root word for complex, means woven and the verb is “to embrace, or comprehend, a pattern.” ...There is a sense in the root word of complex that reality is interpreted or socially constructed in that patterns are embraced or comprehended but not directly, or at least, fully observed”.*

*“Complex educational approaches **enable** learning in contexts where there are no precedents....The focus is on the unique learning needs and looks at the interplay between reflection and action.” B. Zimmerman, **It is Time to Differentiate Voluntary Sector Education***

How do voluntary/ nonprofit leaders deal with the growing complexity of their work? What challenges do we experience as we cope with complexity and change? What kind of learning supports our ability to deal with complexity?

Vulnerability: Walking the Fine Line Between Mission and Survival

Friday, June 11, 1 – 4 pm, Leslie Kemp and Chloe O’Loughlin, Facilitators

“A big struggle – I think it is the key struggle in the sector right now – is staying true to mission.”

*“You are constantly having to juggle your mission and mandate to suit the funding agenda. It isn’t your funding agenda. Let’s be clear – it is their funding agenda.” K. Scott, **Funding Matters**, 2003.*

The tension between developing a financially sustainable organization and maintaining focus on mission-related activities is one that more and more organizations are experiencing as they struggle to meet criteria of funding agencies. How do we manage this tension effectively in our role as voluntary sector /nonprofit leaders?

Tool #5



A Day Long workshop
to discuss leadership competencies

Tool #5 Day of Exploration about Leadership in the Voluntary Sector

Who are we targeting?

- Voluntary organizations, especially those serving vulnerable populations
- Paid staff
- Include funders and potential funders
- 80-150 participants
- Diversity – youth, seniors, disability, immigrant groups, etc.

What outcomes are we trying to achieve?

- Contributing to the creation of a learning culture in the sector by modeling accessible learning approaches during the workshop itself. (e.g. the Networking Game cultivates participants' ability to ask others for help.)
- Increasing participant's self awareness of the role of leadership in their work – participants will engage with the topic of leadership and reflect on what it means in their work.
- Testing the validity of the NLI competencies and adding/modifying the framework for the BC context.
- Increasing awareness of participant's own leadership strengths and weaknesses.
- Increasing awareness of the sector's leadership strengths and weaknesses.
- Identifying a personal strategy for leadership development.
- Identifying a collective strategy for cultivating leadership capacity in the sector.

How does your perspective about learning fit with the following statements? If you agree, check them off...if not, let's discuss.

Learning to Lead:

- Is different for everyone – people learn differently
- Is about our capacity to learn more, not about how much we know
- Has a social component – we rarely learn in isolation
- Is comprised of stages – preparatory, engaged, integrated
- Should be designed around the learner's needs within his/her work environment
- Can be community-based, peer-led and informal
- Can be integrated into the work day
- Is a shared responsibility within an organization/community/sector
- Is ongoing – constantly re-focused or re-directed to achieve new outcomes

- ❑ Is constructive – building on what the learner already knows/does
- ❑ Is essential for success – personal performance/organizational performance

A Popular Education Approach:

- Fun
- Interactive
- Places peoples' experience as the centre point for developing effective strategies for change and program development
- Give participants something practical to take away – e.g. a personal strategy. Overview of the Day:
Proposed Format

| Time | Activity | Method/Who Responsible |
|----------------|--|--|
| 9:00 – 9:30 am | Setting the Stage Welcome and overview of the day Introduce and play “Leadership Bingo” Proposed outcomes & approach for the day Approach to leadership | Voluntary and Post Secondary sector leaders Everyone plays Bingo |
| 9:30 – 10:30 | Sharing Experiences about Leadership and the Context in which we Work | Facilitation: Interviews in Pairs 3 Pairs form small group to share their experience Share highlights (lge grp) |
| 10:30 – 11 | BREAK | |
| 11 – Noon | NLI Leadership Competencies Presentation of competencies (10 minutes) Q & A for 10 minutes (10 minutes) Small groups choose 1 – 2 competencies to focus discussion on questions (30 minutes): Does this framework fit our own experience? Can we add to the framework? What new revelations/ learnings does this framework contribute to our understanding of our experience? Large group reflection – highlights of group discussions | Presentation and facilitation |
| Noon – 1 pm | LUNCH | |
| 1 – 2 | Personal Mapping of Leadership Competencies Participants will be given a competency list to rank their own strengths and gaps Participants will be invited to identify up to 3 personal goals in relation to their own leadership capacity development Networking Game Participants will be invited to choose one of their goals and find someone randomly to discuss ideas, resources, books, etc. to help them address their goal (move to different | Introduce and facilitate |

| Time | Activity | Method/Who Responsible |
|-------------|--|--|
| | partners up to 7 times) | |
| 2 – 2:30 | <p>Collective Mapping of Leadership Competencies</p> <p>Competencies are listed on flip chart sheets taped to the wall.</p> <p>Participants are invited to put dots beside those competencies that represent “priority strengths (green)” for them and “priority gaps (red)”</p> <p>Large group reflection/analysis of this re these questions: What does this map tell us? What collective strategies /resources can be used to strength leadership capacity and address leadership gaps?</p> | <p>Facilitators</p> <p>Flip charts on wall</p> <p>Competencies listed</p> <p>Participants put green dots on ‘priority strengths’</p> <p>Participants put red dots on ‘priority weaknesses’</p> <p>Large group reflection</p> |
| 2:30 – 2:45 | BREAK | |
| 2:45 – 3:30 | <p>Collective Strategy Exercise</p> <p>Group identifies resources that are available currently in the community for the collective ‘priority gaps’.</p> | <p>Facilitation</p> <p>Large group and leaders</p> |
| 3:30 – 4 | <p>Reflections on the Day / Wrap-Up</p> <p>Invite reflections/highlights/key learnings of the day</p> <p>Evaluation forms (people fill out individually and collect)</p> | <p>Reflection</p> <p>Large group and leaders</p> |

Leadership Bingo

Ask one of these questions to someone in the room. If they have an example of what they have done in relation to the question, you may tick off this box.

Keep finding people to ask questions and find out what their experience is.

When you have ticked off one line of five boxes (any direction), call BINGO!

| | | | | |
|---|--|--|---|---|
| Can you hold a vision of the bigger context while being attentive to details? | Have you been a spokesperson for media? | Are you passionate about your work? | Have you created policies or intervention to support a healthy workplace? | Have you helped to start an organization? |
| Have you been a mentor to someone? | Have you helped to articulate complex ideas? | Have you built a long-term relationship with a funder? | Have you met with your MLA about a policy issue? | Do your actions embody compassion and respect for others? |
| Have you written a successful fundraising proposal? | Have you shared your vision and inspired others? | Have you created a welcoming environment for people from diverse backgrounds and cultures? | Have you supported others to learn? | Have you facilitated opportunities for collaboration between organizations? |
| Have you organized a political protest? | Have you made a key decision in the face of many unknowns? | Have you helped keep your organization focused on its core mission and values? | Have you developed an idea that will help make your organization sustainable? | Have you resigned on principle? |
| Have you created a unique program? | Have you helped support your organization to be socially responsible (e.g. Fair Trade) | Have you helped connect people with each other? | Have you written a letter to the Premier? | Have you supported creative adaptations to changing external circumstances? |

Appendices



#1 The Voluntary Sector in Canada

#2 NLI Activities across Canada 2004-05

#3 Voluntary Sector HR Capacity Building Project

Appendix #1

The Voluntary Sector in Canada

The voluntary sector affects almost every part of our lives, providing services and programs, contributing to research and policy development, supporting culture and the arts, fighting against discrimination or for a cleaner environment, and making the formal practice of religion and spirituality possible.

Not every organization in the voluntary sector recognizes that it belongs there (yet). The concept of a voluntary sector is very new, and many organizations identify with their sub-sector, i.e. health, international development, child care, environment, sports, recreation, etc. more than with the voluntary sector as a whole.

The voluntary sector:

- Is made up of 180,000 organizations, of which about 80,000 are registered charities. All of these organizations have volunteer Boards of Directors. Many use volunteers in their service delivery (coaching children's sports programs, for example) or advocacy work (lobbying for improved social or health care systems, for example)
- Employs at least 900,000 people, full-time (bigger than construction, oil & gas, and forestry combined)
- Has annual revenues of over \$90 billion (as big as the economy of the province of BC)
- Is supported by volunteers, who give over a billion hours of their work each year – 27% of Canadians volunteer each year.

(Voluntary Sector Forum)

Key features of voluntary sector organizations that make them different from either private sector or public sector organizations. These differences require that the leaders have a different set of competencies. Some of the differences include:

Unlike a corporation which is accountable to only its shareholders, a voluntary sector organization is accountable to its Board of Directors, its funders, its clients, and its other stakeholders. These various stakeholders have differing expectations and demands, which sometimes are in conflict with each other.

Voluntary section organizations have shared organizational leadership and governance. The relationship(s) are difficult to manage, and the division of responsibilities not always clearly understood or implemented, particularly since it varies from organization to organization.¹⁰

Most VS organizations are so small that they cannot afford multiple senior positions to share the leadership and management responsibilities, and so both reside in one person.

The sector has unique skills requirements such as fund raising and volunteer program management that are not required in other sectors.

¹⁰ There are at least three different organizational frameworks to define the Board-staff governance relationship: 1) traditional, 2) Carver policy governance model, and 3) complementary leadership.

Appendix #2

NLI Activities across Canada 2004-05

This year, the NLI has two major objectives:

- Test the competencies and learn more about the voluntary sector's learning needs, through pilot projects; and
- Develop a results-based framework to assist us to recognize milestones in the process of developing a culture of learning in the voluntary sector, and strengthening the capacity of the voluntary sector through enhanced education and training opportunities.

The three pilot projects are taking place in Vancouver, Calgary, and a pan-Canadian one with delivery locations in Yellowknife, Ottawa, Niagara-on-the-Lake, and the Tatamagouche Centre outside of Halifax.

The Vancouver pilot project, jointly led by the Voluntary Organizations Consortium of British Columbia (VOC-BC) and Langara College, is spending a year exploring:

- How leaders learn values, beliefs, knowledge and skills that are required to lead
- How to nurture and develop new and emerging leaders working in nonprofit/voluntary organizations.
- The focus is on leaders who:
 - Work in paid management and leadership positions
 - Work in small organizations
 - Serve vulnerable populations.

The pilot is using a community development approach, as well as a complexity approach, to ensure that they remain open to whatever learnings emerge through the various processes, rather than filtering their perceptions through existing mental models, and embedded habits of relationship.

The Calgary pilot project, led by Mount Royal College's Institute for Nonprofit Studies, is working with a group of Executive Directors using a "learning circle" approach to provide a forum for learning, dialogue, inquiry, and problem solving about issues related to job satisfaction. In addition to the direct benefits to the participants, there will also be case studies and related research which will be published, allowing for a larger segment of the voluntary sector to benefit.

The 10 case studies will provide a snap shot of

- what the current job satisfaction of Executive Directors is,
- what constitutes a satisfying role,
- how Executive Directors weigh elements of job satisfaction in making career decisions,
- how dynamic the elements of job satisfaction are over time, e.g., from a novice through to an experienced Executive Director

The cases could provide a basis for future research into retention, compensation, workplace modifications to enhance job satisfaction and motivations of Executive Directors.

The intention of the pan-Canadian project, led by the Niagara Centre for Community Leadership, in partnership with Dalhousie University, La Cité collégiale, and the YWCA of Yellowknife, is to build a self-sustaining, continuously evolving, voluntary leadership program that can be replicated in community colleges and/or universities across Canada, delivered in a “hybrid” model that combines the best of both *onsite* and *distance learning*. In its first year, the Leadership Context program is being offered in four locations across Canada: Nova Scotia (outside Halifax), Yellowknife, southern Ontario, and Ottawa (for franco-ontariens). The ability of the program to meet the education, training and learning needs of the local voluntary sector organizations will be evaluated at the end of year I, with identification of any unique characteristics which will need to be taken into account for future offerings.

The NLI results-based framework will primarily serve as a management tool, assisting us to assess our progress to date, identifying future activities to accomplish the NLI goals, and serve as a basis for formal evaluation.

Future Activities:

Tentative: As part of a larger evaluation process, hold a strategic review meeting with interested stakeholders in the future of voluntary sector education and training, potentially fall of 2004, which will provide an opportunity to showcase the pilot projects, as well as other voluntary sector leadership initiatives, and identify ways to collaborate more effectively.

Tentative: Integrate with the Voluntary Sector Human Resources Council, assuming it is established in early 2005, to continue to address the education, training and learning needs of the voluntary sector.

Appendix #3

Voluntary Sector Human Resources Capacity Building Initiatives

Voluntary Sector Initiative (VSI) – revitalizing the relationship between the government and the “third” pillar of Canadian society – resulted in an Accord, which was proclaimed in December 2001, and two Codes of Good Practice in the areas of Funding and Policy Engagement – education and implementation are underway at this time in the VS and in the federal government

VSI Capacity Joint Table – focussed on building the capacity of the voluntary sector in 4 major areas: human resources, funding and financing of VS activities, general knowledge and understanding about the Canadian VS, and VS engagement in federal policy development processes. Through the efforts of the VSI CJT, the NLI and the HRVS projects were started.

Developing Human Resources in the Voluntary Sector (HRVS) provides VS organizations with practical human resources tools and information related to paid employees in the VS, all available through their website at www.hrvs-rhsbc.ca.

Voluntary Sector Human Resources Council Feasibility Study (no catchy acronym) is checking in with the voluntary sector to see whether or not they would support the establishment of a Human Resources Council that could provide capacity-building assistance to the voluntary sector with regard to its labour force. Potential Council activities could include: on-going provision of information and tools related to HR management in the voluntary sector (carrying on the work of the HRVS project), upgrading the quality and availability of education and training for the VS (carrying on the work of the NLI project), as well as other activities like brokering relationships between the VS and the insurance industry re enhanced benefits packages for VS staff and/or enhanced liability insurance coverage. There is a lot of work to be done, as is demonstrated by the work of the Canadian Policy Research Networks in their analysis of the Workplace Employee Survey data gathered by Stats Canada through the lens of the voluntary sector.

Voluntary Sector Portal project is a new initiative from the VSI's IM/IT Table, designed to create a system to permit the diverse voluntary sector to share information and talk with its component parts through linking initiatives that are useful to the whole sector. This initiative is at the design stage.

National Learning Initiative for the Voluntary Sector (NLI) is pursuing the goal of enhancing the quality and availability of education and training specific to the voluntary sector, with its first area of focus on leadership.

For Further Dialogue and Information

For further dialogue and information, contact one of the following:

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