



# National Learning Initiative for the Voluntary Sector

## Pan-Canadian Pilot Project Final Report



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**And the 2004 Participants of  
Leadership Connex**

*"A mighty flame followeth a tiny spark – Dante.*

*This is how I feel about Leadership Connex. It may seem small but just opening my mind to these ideas and concepts has changed my life. I am now at the beginning of a journey which will last a lifetime. A journey which will help myself, which will touch the lives of so many people.*

*A course like this can change a person's life!"*

*- 2004 Leadership Connex Niagara Participant*

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## **Executive Summary:**

The National Learning Initiative (NLI) pan-Canadian pilot project involved a collaboration of three educational institutions, with voluntary sector partners, in offering a voluntary sector leadership school in four diverse, and geographically far-flung, Canadian communities: Yellowknife, NWT; Niagara-on-the-Lake and Ottawa, ON (for franco-ontariens), and at the Tatamagouche Centre in Nova Scotia for the Maritime region.

The purpose of these leadership schools was to build capacity for leadership within the voluntary sector, based on the leadership competencies developed through the NLI.

The program was offered as a hybrid of workshop and distance learning methodologies, with a three-day residential component at the start of the program, followed by assignments and on-line support, followed by a second three-day residential component to complete the program. The first residential component was offered in spring/early summer of 2004. The second residential component was offered in fall of 2004.

The pan-Canadian pilot project was part of the larger NLI initiative funded by the Government of Canada through the Voluntary Sector Initiative.

The philosophy of leadership development that guided the pan-Canadian pilot project was based on the assumption that everyone (staff, volunteers, leaders, stakeholders) is both capable and responsible for self-leadership, and that leadership begins from the inside, i.e. a transformative leadership approach. Further, in facilitating leadership development, it is vital to practise the disciplines of reflection, understanding, and action. Based on this philosophy, the pan-Canadian pilot project working group articulated 14 principles for offering voluntary sector leadership development educational experiences (see full report).

Originally the pan-Canadian pilot was envisioned as taking the form of a standardized curriculum offered in four locations, modified as necessary based on the needs of the group. With the early withdrawal of one of the partnering locations, and the consequent late addition of La Cité collégiale into the mix of educational institutions and project locations, it became apparent that different administrative arrangements would be necessary. In response to the changed situation, the NLI project manager assumed a coordination function among locations, and worked individually with three separate educational institutions.

These changes had financial implications, as well as workload implications. The original anticipated cost for this project was \$133,405, together with in-kind contributions of \$38,063, for a grand total of \$171,468.<sup>1</sup> **The final cost of the project, including in-kind contributions and tuition fees, was \$305,103.**

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<sup>1</sup> NOTE to Project Officer: All costs reported here are total costs for the project, although split between two contribution agreements: 1) held by NVO from Oct 2003-March 2004; and 2) held by CFC from April 2004-March 2005.

## **What we learned:**

### About social inclusion:

- Given the Yellowknife experience, we raise the question of reconciliation as a necessary pre-condition for social inclusion of aboriginal peoples, after a long history of colonization.
- Without specific outreach to those parts of the voluntary sector serving marginalized people with Canadian society, it will not be possible to meet their specific needs.
- Given high demands with limited resources on organizations serving marginalized peoples,<sup>2</sup> there are specific challenges to be addressed in marketing leadership development opportunities such as this as relevant, justifying the investment of time and funds.
- Participation in a learning opportunity such as this presents challenges to the participants, particularly for those with chronic illnesses.
- The provision of leadership development opportunities in rural and remote locations requires the support of high capacity organizations for the development, facilitation and delivery of programming. Having an outside partner, who is sensitive to the dynamics of remote/rural communities, is crucial.

### About voluntary sector needs:

- The voluntary sector has a diversity of needs with regard to leadership development, including the need to:
  - Strengthen the existing cadre of voluntary sector leaders
  - Cultivate the upcoming cadre of voluntary sector leaders
  - Build relationships across generations for mutual benefit.
- High rates of staff turnover within the voluntary sector affect participants' abilities to participate in programs such as this.
- The voluntary sector is hungry for educational opportunities specific to meeting its needs.
- The initial curriculum developed for *Leadership Connex*/*Leadership Réseau* is a significant benefit to the voluntary sector. However, finding a sustainable way of offering the program, given financial constraints, remains a challenge.

### About leadership development:

- Voluntary sector participants demonstrated a clear preference for learning opportunities based on adult learning principles.
- Learning is a risk-taking activity. Some aspects of leadership development are best done away from the employment situation.

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<sup>2</sup> While most organizations within the VS would identify with this description, there are degrees. Organizations serving aboriginal or visible minority people, or people with disabilities, often have fewer resources when compared with the demand basis, than do more “mainstream” voluntary sector organizations.

- Participants benefited most from in-depth focus on relatively few topics, rather than quick overview of many topics.

#### About collaboration:

- Collaboration between educational institutions and the voluntary sector takes time, patience, and openness to new ideas. The process, which must engender trust amongst participants, requires the development of a shared framework for working together.
- Prior relationships between the voluntary sector and educational institutions assist with getting the word out to the sector about an opportunity.

#### About successful implementation:

- Programs of this level of complexity need to be supported by organizations with high levels of capacity in terms of skills, experience, and infrastructure, with the ability to pay close attention to detail.
- Passionate, dedicated, and knowledgeable facilitators are key to successful implementation.

#### Next Steps:

- In Niagara: The Centre for Community Leadership has received funding to sponsor a Youth Voluntary Sector Leadership School in 2005.
- In Ottawa: Plans are underway to replicate and build on the success of Leadership Réseau in 2005.
- In Yellowknife: Negotiations are underway for a follow-up workshop to address the needs identified by the group. Additionally, participants have signed up for Moderator Training with the Voluntary Sector Portal, to facilitate their on-going use of the technology.
- In Nova Scotia: Funding is currently being sought to support broad access to a follow up program, possibly for a sub-sectoral constituency. Both organizations are incorporating voluntary sector leadership development into their strategic planning, and applying their experience to the design of new workshops and courses.

## Introduction:

The pan-Canadian pilot project involved a collaboration of three educational institutions, with their voluntary sector advisory committees, offering a program in voluntary sector leadership development in four diverse, and geographically far-flung Canadian communities:

- Niagara College's Centre for Community Leadership (CCL) offered *Leadership Connex* in Niagara-on-the-Lake and Yellowknife, in collaboration with the YWCA of Yellowknife;
- La Cité collégiale offered *Leadership Réseau* in Ottawa to their community of franco-ontariens of eastern Ontario;
- Dalhousie University's Henson College offered *Leadership Connex* in conjunction with the Tatamagouche Centre in Nova Scotia, to the Maritime voluntary sector community.

### *Distributed leadership<sup>3</sup> within our Pan-Canadian pilot project*

The environment we created during this pilot project meant that everyone felt free to develop and share new ideas. We all needed to cooperate to create this pan-Canadian pilot project, and were successful despite challenges presented by changes in personnel over the course of the project.

During the development of the pan-Canadian pilot project, leadership was distributed as follows:

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- <sup>3</sup> Under Distributed Leadership, everyone is accountable for leadership within his or her area of responsibility. A central goal of the approach is for individuals to succeed in a climate of shared purpose, teamwork, and respect – an atmosphere in which those involved can reach out to help one another and feel free to turn to ask for help. Good ideas can come from anyone in the group. The following are principles of Distributed Leadership (from the work of James Spillane):
1. Distributed Leadership does not mean *delegating*. Instead, it means finding the best path by tapping the expertise, ideas, and effort of everyone involved.
  2. Distributed Leadership brings success in handling problems, threats, and change. It not only encourages idea sharing; it demands it. Good ideas can come to fruition because a team is ready to ignite the process moving from concept to reality.
  3. "The way we've always done things" isn't necessarily the best way. Using Distributed Leadership, better ways can be sought and tested through controlled, reasoned risk taking.
  4. In a Distributed Leadership environment, mistakes often lead to discovering valuable new approaches.
  5. In Distributed Leadership, not everyone is a decision-maker, but everyone is an expert whose knowledge contributes to the decision-making process.
  6. Distributed Leadership is not for mavericks and lone eagles.
  7. Distributed Leadership is about cooperation and trust, not about competition among organizations. The same mission is shared although even though each may contribute to it in different ways.
  8. Distributed Leadership empowers everyone to make his or her involvement more efficient, meaningful, and effective.
  9. Under Distributed Leadership, everybody matters.

- Niagara College Centre for Community Leadership Advisory Committee's input into content,
- Co-development of curriculum (Lyn Russo and Glory Ressler at CCL, Grant MacDonald and Wayne Edgar at Dalhousie/Tatamagouche Centre, were co-creators),
- Using participant feedback as a means to modify content (based on needs and skill levels of group, written and verbal feedback throughout),
- Co-creating leadership philosophy, pilot presentation and reporting structure,
- Shared curriculum broadly (online for participants and other pilot leads) with plans to share further

During the implementation phase, leadership was distributed through:

- Multiple facilitators
- Collaborative operations, coordination and execution (Niagara CCL and Yellowknife YWCA; Henson College & Tatamagouche Centre)
- Multiple stakeholders' needs addressed and feedback incorporated into adaptation of and/or customization of facilitated learning exercises

How did this work in practice?

The NLI Project Manager facilitated planning for the development and implementation of the pan-Canadian pilot project at three face-to-face meetings of the team: November 2003 (preparatory discussions about process), March 2004 (implementation planning), and November 2004 (discussion of learnings, and final report planning).

CCL took the lead in developing the curriculum, working closely with their Voluntary Sector Advisory Committee, and relying heavily on the NLI leadership competencies. This baseline curriculum was then taken and modified, to a greater or lesser degree, in each of the communities where the pan-Canadian pilot was offered.

In Nova Scotia, the Advisory Committee wanted to see more focus on self-awareness, and less on organizational skills. They also wanted to see an emphasis on diversity and on negotiation and collaborations skills. . This required the creation of new content units.

In Ottawa, the curriculum was modified and translated to meet the needs of a franco-ontarien community. In Yellowknife, the curriculum was modified during the implementation of the workshop to meet the needs of the highly experienced group of northern voluntary sector leaders who were participating.

### *The Leadership Connex/Leadership Réseau philosophy*

What made *Leadership Connex/Leadership Réseau* different from any other leadership school? In part, the differences emerged because of the close collaboration between the voluntary sector and the educational institutions in developing the content of the leadership school. In part, the program was different because it was based on voluntary sector leadership competencies developed by and for the voluntary sector.

Crucially, however, this leadership school was different because it was based on a philosophy of transformative leadership, as articulated by the pan-Canadian pilot project leads.<sup>4</sup>

### ***Our philosophy of leadership***

Qualité essentielle à tout leader dans la communauté, le leadership s'avère **la courroie de transmission** nécessaire à la réussite de l'ensemble des fonctions de la gestion moderne.<sup>5</sup>

Leadership in the post-modern, complex and rapidly changing voluntary sector environment is an 'inside out' job. This requires that individuals recognize and integrate their unique leadership style and capabilities and pro-actively seek out development opportunities (lead yourself first and then others). It implies that leaders personally adopt and model a 'lifelong learning perspective'. Leaders must 'become the change they wish to see' through ethical, innovative, participatory and strategic responses to complex conditions, multiple accountabilities/stakeholder groups, and challenges of resourcing. The success of leaders hinges on their ability to identify an inspiring vision, and mobilize support and action for its realization.

Leadership est aussi importante dans le sens que tous sont appelés à jouer un rôle de leadership peu importe leur statut d'employé. Leadership est une façon d'être et d'agir au sein d'un organisme qui se veut une communauté apprenante, telle que définie par Senge.<sup>6</sup>

### ***Our approach to facilitating leadership development in the Voluntary Sector***

Our philosophy of leadership assumes that everyone (staff, volunteers, leaders, stakeholders) is both capable and responsible for self-leadership. A critical key to developing healthy systems is that everyone recognizes their capacity and responsibility, and exercises their self-leadership in support of the common goals. When we are able to lead our own development and transformation, through inspired personal and professional vision and action, then we are ready to learn and apply the specific skills that will assist us in facilitating the leadership and overall development of other systems – whether they be teams, organizations, communities, nations or international collectives.

Les établissements de formation doivent jouer un rôle actif dans la promotion du développement du leadership communautaire notamment par le biais de ses propres réseaux tels que les comités consultatifs des programmes qui forment des travailleurs

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<sup>4</sup> Brenda Herchmer, Grant MacDonald, Glory Ressler, Lyn Russo (?), Martine Cardinale, and Francine Charland, with the collaboration of Bev Suderman.

<sup>5</sup> Leadership is an essential quality for every community leader. It functions as the essential "drive belt" to achieve success through the ensemble of modern management functions.

<sup>6</sup> Leadership is also important in the sense that everyone is called upon to play a leadership role, no matter what their status as employees or volunteers within an organization. Leadership is a way of being and of acting within a learning organization, as per Senge's definition.

communautaires, les étudiants qui travailleront à leur tour dans la communauté ainsi que par tout projet pouvant impliquer les agences et services communautaires de la région.<sup>7</sup>

Pour promouvoir et renforcer les capacités de leadership au sein du secteur bénévole, il faut aller au-delà des fondements théoriques et des principes. Il faut fournir aux employés et membres de conseil du secteur bénévole l'occasion de pratiquer et de mettre en oeuvre certains outils et modèles en utilisant leurs propres expériences et situations réelles dans leur milieu de travail. Le formateur joue un rôle d'expert-conseil, de facilitateur et de coach pour appuyer les intervenants dans la découverte d'eux-mêmes et de leur organisation.<sup>8</sup>

In facilitating leadership development, it is vital to practice the disciplines of reflection, understanding, and action.

***Principles from which we approached the challenges of holistic Voluntary Sector leadership development***

***This innovative, effective, unique leadership training experience has allowed me to re-assess my leadership goals – both personal goals and goals for the sector – and has re-energized me so I can move forward to realize my leadership goals.***

Our approach took, as its primary inspiration, the four NLI leadership domains of self, organization, community and world. We looked at leadership from a transformative, rather than situational, perspective, which involved:

- An orientation to transforming the world by starting with oneself
- The discipline of self-reflection
- A willingness to suspend judgment
- A willingness to critique one's own assumptions and premises, including those based on gender, race, ability, sexual orientation, among others
- An interest in developing greater understanding of what it means to live in a global society
- An openness to change in one's own beliefs; an openness to persuasion
- The ability to hold conflicting views
- A tolerance for ambiguity

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<sup>7</sup> Training organizations/institutions must play an active role in the promotion of community-based leadership development, particularly through their approaches to existing networks within the community. For example, training programs for the community-based workforce should be guided through Advisory Committees made up of local representatives of community-based organizations as well as students who are aiming for a career in community-based organizations.

<sup>8</sup> In developing and strengthening leadership abilities within the voluntary sector, it is necessary to go beyond the theoretical foundations and principles of leadership. It is necessary to provide, for both employees and voluntary organization board members and other volunteers, opportunities to practise with tools and models that use their personal experience and reflect situations from their work life, as a foundation for learning. The facilitator/trainer plays the role of expert advisor, of facilitator, and of coach in supporting program participants in their discovery of self, and of their organizations.

- Curiosity
- Operating from the heart, and from the mind.

***I was ready to grow in this direction, but nothing really fit what I wanted. This program provided the complexity of information I needed.***

The following principles formed the basis of our approach to delivering the leadership school, and are essential to effectively working with the voluntary sector in any initiatives to build capacity:

- 1) Les approches pour encourager le développement du leadership dans le secteur bénévole passent par **l'établissement d'un réseau de communication** efficace et proactif (newsletter, portail, conférence, formation, etc.) et par **la diffusion des nouvelles à succès** (success story).<sup>9</sup>
- 2) **The content of any focused leadership development program must be responsive to the needs of voluntary sector participants and this will vary depending on the geography, demographics, work experience, and sub-sectoral representation within the group.**
- 3) **Facilitators** must be **highly skilled/experienced** to be capable of making 'on-the-spot' content and agenda revisions that result in a more meaningful and relevant experience for specific groups and individual learners, i.e. adapt to the group's needs and experience.
- 4) In developing the program, a **balance** must be ensured between
  - learning/cognitive activities (through presentations, reading)
  - skill development activities (through exercises that apply learning), and
  - self-care (recreation, reflection, down-time, etc.) --
 to model sustainable professional and organizational behaviour AND demonstrate the value of reflection and 'slowing down to go more quickly' / 'working smarter, not harder.' It is important to model this in the structure and delivery of the school as voluntary sector leaders will have to live it, in order to remain personally/professionally sustainable! It also reinforces the 'action learning' model and adaptation core competency.
- 5) **Facilitated exercises** used to integrate the learning must be **varied**, both in terms of structure (individual, pairs, small and whole group) and nature of the exercise (thinking, extrapolating, creating, physical, visual, auditory, etc). Traditional lecture style must be avoided or minimized; adult learning principles should underpin all activities.
- 6) Careful attention must be paid to **distinguishing leadership from management** in the voluntary sector, while at the same time recognizing that leadership includes management as one of its action domains.<sup>10</sup>

<sup>9</sup> Key approaches to encouraging voluntary sector leadership development include the establishment of effective and proactive communication tools, and sharing success stories to inspire participants.

<sup>10</sup> Management is concerned with control issues (efficiency and effectiveness), while leadership is required in every domain within organizations that cannot be predicted or controlled. Both are essential to effective VSO functioning.

- 7) The ‘school’ should be structured and delivered in such a way that there are opportunities for **relationships** to develop and peer-to-peer learning to take place (for example: time to network, ensuring that pairs/small groups are mixed, facilitators enable or encourage connections based upon the strengths, experiences and needs of individuals in group)
- 8) Emphasis should be placed on the fact that leadership development (like learning) is an **on-going, lifelong journey**. This foundation helps individuals to set-up their individual learning cultures, and assists with managing complexity and ambiguity.
- 9) Facilitators must be **sensitive to both content and process**, with expertise in **asking the right questions and providing appropriate nurturing/ challenging experiences**, rather than offering answers. Frequently there are no right answers in particular situations, although there may be a number of choices that are better than some “wrong” answers.
- 10) By the end of the learning event, facilitators should have **transferred the responsibility** for on-going development back onto the group and **provided opportunities for group members to practise and demonstrate their leadership** (ex. lead the group / facilitate exercises, take initiative independent action on projects, research, etc.)
- 11) The **spiritual aspect of leadership** must be addressed through work with ethics, values, vision and mission/purpose. We also addressed it through art, music, and other creative means.
- 12) All four aspects of **leadership competencies** (complexity, strategies and resource management, vision and alignment, and relationships) should be **addressed at each systems level** (self, organization, community, world).
- 13) A model of action learning should underpin the educational event. Part of the programming was based on the Generon model, i.e. that the quality of conversations and the quality of relationships present within a situation affect the quality of “product,” i.e. the higher the quality of conversations and relationships, the higher the quality of final results. In Nova Scotia, the “Theory-Action-Reflection” model of action learning was used as the underpinning.
- 14) Individual **goal setting** (personal and organizational) must be utilized to reinforce the ongoing nature of leadership development and provide a framework for thinking about it. This is reinforced through a requirement to share with the group about individual goals.

*Leadership Connex is a fabulous way to determine your strengths and weaknesses; motivating one to live an honest life.*

### Leadership Connex/Leadership Réseau: The Program

The program was envisioned as a hybrid of workshop and distance learning methodologies, based on a philosophy of transformational leadership, with a three-day residential component at the start of the program, followed by assignments and on-line

support,<sup>11</sup> followed by a second three-day residential component to complete the program. The program was offered as follows:

Location	1 <sup>st</sup> session	2 <sup>nd</sup> session	# of participants (start/finish)
Niagara-on-the-Lake	May 3-5, 2004	Aug. 16-18, 2004	27/22
Ottawa	May 5-7, 2004	Aug. 23-25, 2004	10/10
Nova Scotia	July 9-11, 2004	Sept. 8-10, 2004	20/14
Yellowknife	June 9-11, 2004	Oct. 6-8, 2004	16/12

The project was challenged by changes in personnel, tight timeframes, and shortages of funding to permit high levels of face-to-face time. Additionally, the fiduciary for this project was changed mid-stream, from the Coalition of National Voluntary Organizations to the Community Foundations of Canada, which meant increased administrative time in renegotiating Memoranda of Understanding regarding the relationship between each individual college, and the new fiduciary.

Social Inclusion:

NOTE 1: Detailed information about Ottawa participants not available.

NOTE 2: Participants were invited to check all that apply, meaning that totals exceed numbers of participants.

NOTE 3: Data collected at close of 2<sup>nd</sup> 3-day residential component, so the figures re participants with chronic illnesses is significantly underrepresented.

Organizational Focus			Personal Self-identification
Homeless:	16	1	Homeless:
Refugees:	6	4	Immigrant:
Immigrant:	12	4	Visible minorities:
Visible minorities:	15	2	Aboriginal person:
Aboriginal people:	18	12	Youth:
Youth:	33	9	Rural & northern:
Rural & northern:	22	11	Francophone Cdns outside of Quebec:
Francophone Cdns outside of Quebec:	14	3	People w. chronic illness:
People with chronic illnesses:	14	3	People living in poverty:
People living in poverty:	22	4	People w. disabilities:
People w. disabilities:	24	4	Unemployed:
Unemployed:	7	2	Gay/Lesbian/Bisexual or Transgendered:
Issues of sexual orientation:	7	4	Other:
Other:			

Project Costs

Originally the pan-Canadian pilot was envisioned as taking the form of a standardized curriculum offered in four locations, modified as necessary based on the needs of the

<sup>11</sup> Provided by CCL through the Voluntary Sector Portal project for all locations.

group. With the early withdrawal of one of the partnering locations, and the consequent late addition of La Cité collégiale into the mix of educational institutions and project locations, it became apparent that different administrative arrangements would be necessary.

In response to the changed situation, the NLI project manager assumed a coordination function among locations, and worked individually with three separate educational institutions. This added significantly to the NLI project manager's workload, both for increased administration and unanticipated coordination time, as well as cost to the NLI budget for face-to-face meetings of the pan-Canadian group members (November 2003, March 2004, and November 2004).

***My expectations were far surpassed. Tons of great participants, facilitators and lessons, also lots of tools to take home.***

The original anticipated cost for this project was \$133,405, together with in-kind contributions of \$38,063, for a grand total of \$171,468.<sup>12</sup> Due to changes in the pilot team, particularly the withdrawal of an Anglophone college and addition of a Francophone college, additional costs for translation and adaptation were incurred. One unanticipated consequence of these changes, complicated by changes in key personnel in some locations over the course of the project, was increased time demanded of the curriculum developers, resulting in huge in-kind contributions by private individuals, over and above those committed to by the educational institutions.

Charges related to this project (excluding project manager time and in-kind contributions) were \$144,756, plus \$5,252 in additional meeting costs. Tuition fees collected amounted to \$16,800. In-kind contributions amounted to \$138,295. **The final cost of the project, including in-kind contributions and tuition fees, was \$305,103.**<sup>13</sup> See Appendix A for a detailed breakdown.

#### Challenges:

Key challenges to the implementation of this project can be grouped as follows:

- Interactions between Voluntary Sector Advisory Committee, curriculum developers, and CCL took much more time than anticipated, although the end product validated that the time was well spent. However, this upfront planning time was initially underestimated, and pushed all other dimensions of project implementation, because it was taking place simultaneously with marketing. Due to more extensive collaborations, and resultant communications, that were required to develop the curriculum, time pressures were exacerbated.

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<sup>12</sup> NOTE to Project Officer: All costs reported here are total costs for the project, although split between two contribution agreements: 1) held by NVO from Oct 2003-March 2004; and 2) held by CFC from April 2004-March 2005.

<sup>13</sup> If we assume that the cost of curriculum development was approximately \$100,000, this makes the cost per participant approx. \$2,808.

- There were misunderstandings about what curriculum products would be ready when, which resulted in extreme time pressures for the translation and preparation of the francophone offerings. Staff at La Cité collégiale put in superhuman efforts to meet the deadlines, given the delays in receiving materials from Niagara College. (Since marketing was already underway, it was not possible to push the dates back to accommodate more time.)
- Given the complexity of administrative arrangements, combined with the need for coordination for this pilot project, the reporting structure between individual educational institutions and the NLI was developed collaboratively in response to the evolving nature of the project – within the framework provided by the Contribution Agreements and the original MOU's. However, given changes in managerial personnel at two out of three of the educational institutions, this created enormous difficulties for all concerned. These difficulties were aggravated by a change in fiduciary in mid-project, with differing expectations, and a new project officer, also with differing expectations. It would be fair to say that any organizations or institutions choosing to offer a project of this type should not emulate the administrative arrangements.
- Although the portal was an extremely valuable tool that was useful as a centralized resource for accessing *Leadership Connex*t information, this again took much more time than expected to get things moving smoothly. Key challenges included delays in setting up participants with accounts for their e-learning, and making materials available prior to the beginning of the educational event.

***Our organization is beginning to value the investment in staff training through the information about Leadership Connex*t that I have brought back.**

For specific reporting from the various project locations, please see the relevant appendices.

### **What made this work**

Key factors in the success of the *Leadership Connex*t/*Leadership Réseau* pilot project included the following:

1. All partnering organizations had the enthusiasm, infrastructure and expertise required to mount a project of this type and complexity, despite tight budgets and timelines. They also were willing to take risks on an untried project, with innovative administrative arrangements, as well as trust new partners! Additionally, each location had teams of people whose responsibility was to take care of the logistical details, which permitted the facilitator(s) and participants to concentrate on the program itself.
2. The top-notch facilitators, who also served as curriculum developers and/or adaptors, were essential to the success of the project. The style and substance of the facilitation provided a learning environment where the participants felt safe to

- contribute and to be challenged, to inspire and to be inspired, and to reflect on their existing skills and try out new ones. The high quality of facilitation enabled participants to start a life-long leadership journey. The passion and dedication the facilitators demonstrated to this project was an inspiration!
3. The project Advisory Committees in Niagara and Halifax played an important role in determining the curriculum content, ensuring that it was directly relevant to the Voluntary Sector, and in assisting with the marketing and recruitment of participants. In Niagara, members of the Advisory Committee also played a hands-on role during the workshops themselves.
  4. The NLI leadership competency model, as a basis for the curriculum which was developed, provided the opportunity for participants to explore the various dimensions of voluntary sector leadership, particularly self, organization, and larger community.
  5. The venues of the residential portions of the workshop were very important to the overall atmosphere created during *Leadership Connex*. All facilities were basic, i.e. not luxurious, and yet surrounded by beauty in the natural landscape that stimulated the spirit, and rested body and soul. Importantly, all facilities were also large enough and flexible enough to accommodate the varied activities required by the curriculum, although in some cases, this required creativity to make it work. For example, the session on Open Space Technology was cramped in Niagara with 25 participants. The Yellowknife computer lab, designed for 8 trainees, required that the group be split in two parts; participants were still cramped in the lab during the training sessions.
  6. The energy, passion and commitment of the participants themselves, who thrived, grew, became inspired and prepared to go back into their communities with their newfound knowledge. Their deep and passionate interest in personal leadership development and social change was essential to the environment that was created during *Leadership Connex / Leadership Réseau*. Group size of 10-20 participants is ideal.
  7. *Leadership Connex/Leadership Réseau* met an identified need within the community, for learning about voluntary sector specific leadership.<sup>14</sup>
  8. The binder of materials received by the participants, based on the curriculum, met their needs, and provides an excellent resource for future reference. The material developed also provides the opportunity for future modularization or other adaptation to a variety of Voluntary Sector education and training needs.
  9. The curriculum was designed to be delivered based on adult learning principles, with a whole person approach; the varied activities permitted diverse learning styles to be addressed.
  10. A program of this type would not have been possible without significant subsidization, in this case from the Government of Canada. Of critical importance, the funding allowed for curriculum development, subsidization of

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<sup>14</sup> More than 96% of the participants that responded to this question, in both Niagara and Yellowknife, indicated that there is a great need for this type of training. This is supported by the “Niagara Voluntary Sector Labour Market Study,” which identified that 77% of Niagara based voluntary sector organizations do not have succession planning in place and nearly 50% of the same organizations say that retaining their staff will be a major issue, as will recruitment.

participant fees, and newspaper advertising (an unheard-of luxury for many educational institutions these days).

## **Regional Differences in Program Delivery**

### Partnerships:

- In Nova Scotia, Dalhousie University's Henson College of Continuing Education, and Tatamagouche Centre partnered to offer *Leadership Connex*. While the two partners shared a common educational philosophy, each brought to the project complementary expertise and skills. CCE had a stronger content and theoretical focus particularly in the areas of interpersonal communication, conflict resolution and negotiation as well as a lot of experience with self-assessment questionnaires and role-playing techniques. In addition to the venue itself, Tatamagouche Centre's strengths lay in the area of reflective learning, group dynamics, racism and diversity education, and social justice. The two organizations made a significant in-kind investment of professional and, in the case of Dalhousie, institutional resources. This would not have been possible without both a personal and organizational interest in voluntary sector development, an enthusiasm for developing new approaches to facilitating learning, and an expectation that as a result of the project they would receive further recognition as educational resources for the voluntary sector.

***Thank you for offering young people the opportunity to be visionary and to develop a foundation to help realize those dreams.***

### Participant application and selection:

- In Nova Scotia, the participant selection process involved the submission of personal statements and letters of support from a VSO, by each applicant, . Organizers there believe that this process added significantly to the participant commitment to the experience and to their self-esteem, as well as to facilitator understanding of the needs, expectations and strengths of each individual coming into the group.
- In Yellowknife, potential participants received personal invitations from the YWCA as host organization, based on knowledge of the sector in this relatively small community. There was no application process. The group which emerged from this was diverse in many respects, and homogenous in the sense that almost all participants held senior positions within their organizations – which may in part be a characteristic of northern organizations, with extremely limited staff.
- In Niagara-on-the-Lake, participants were required to apply – but it was anticipated that the applicant numbers would be higher than they turned out to be. Ultimately all applicants were admitted. The facilitators did not see the applications prior to the workshop, meaning that in at least one case, an issue arose due to mental health concerns of one participant.

Educational model underlying planning and delivery of the program:

- In Nova Scotia, the educational model that was employed in the planning and delivery of the program was of critical importance. The curriculum was built around the application of the theory-action-reflection model of learning that is the basis of the Tatamagouche approach to program design and one that underpins or guides much of the continuing education work at Dalhousie University.
- In Yellowknife and Niagara-on-the-Lake, the educational model that was employed in the planning and delivery of the program was the Generon model, which identifies that the quality of our outcomes depends on the quality of our thinking, the quality of our conversations, and the quality of our relationships.

Facilitation:

- In Nova Scotia, the facilitation team was made up of both senior and junior facilitators. Grant MacDonald from Dalhousie University's Henson College for Continuing Education, and Wayne Edgar, from the Tatamagouche Centre, who also developed the specific curriculum used in Nova Scotia, served as senior facilitators throughout the program. The use of two "junior" facilitators as part of the facilitation team both supported the goal of developing the next generation of leaders and provided an important bridge in ages between the team and younger participants.
- In Yellowknife, the facilitation team varied greatly. Over the course of the first three days, Glory Ressler, one of the curriculum developers, was the lead facilitator, and she worked with two volunteer facilitators: Bev Suderman, and Carol Pupo, in part because scheduling conflicts did not permit Lyn Russo to go. Dr. Ken Balmer made a guest appearance in this period also. In October, Glory Ressler and Lyn Russo, the curriculum developers and Niagara facilitators, co-facilitated the second three-day session.
- In Niagara-on-the-Lake, Glory Ressler and Lyn Russo, the curriculum developers, co-facilitated both sessions. They were supported by guest appearances from Janice Wismer, Senior VP for Human Resources with Canadian Tire, and Dr. Ken Balmer, a futurist, who challenged the group on issues related to trends in the Voluntary Sector.
- In Ottawa, Francine Charland, who was also responsible for adaptation of the curriculum to a franco-ontarienne audience, carried the entire facilitation responsibility herself, with the exception of guest appearances by Lynne Toupin and Dr. Ken Balmer.

Daily schedule:

- In Ottawa, participants found that the residential requirement and the long days were counter-productive to their learning. The residential requirement was difficult for them, and aside from the participants from outside of Ottawa, they did not find it beneficial. Additionally, participants criticized the evening components of the program, after long days of workshop, as being excessive.

- In Niagara-on-the-Lake and Nova Scotia, participants really appreciated the residential requirement, although for some participants making the necessary arrangements had been challenging, particularly when child care for young children was required. They found<sup>15</sup> that the residential requirement gave them the break from their busy lives that permitted them to focus on the task at hand, and nurture themselves – a clear case of a “change being as good as a rest.” There were no complaints about the evening components.
- In Yellowknife a number of participants chose to commute each day to the retreat centre, which was a flexible arrangement permitted by the YWCA on the condition that their absence not be noticeable, i.e. commuting participants were present for all meals on-site, and did not leave until evening activities were completed. Given the proximity of the retreat centre to town, and the few participants who availed themselves of this option, there was no impact on the group dynamic as a result – and the needs of all parties were met.

#### Resources:

- In Nova Scotia, project resources were allocated to purchase various self-assessment instruments (e.g. Learning Style Inventory and FIRO-B). Although they were expensive to purchase, they were, according to participants, very valuable to their learning.
- In Yellowknife and Niagara-on-the-Lake, the emphasis was on self-assessment instruments that were freely available through the Internet or other sources. While participants engaged with these instruments, they found that the results were fairly lightweight, and not very useful, although had the advantage of being readily available for on-going work within their organizations.
- In Ottawa, the daily journaling exercise, in a journal provided by the program, merited specific recognition as a valuable tool in aiding participants’ learning.

#### Use of e-learning and other technology

- The opportunity to connect via the Internet, and access the facilitators, and post assignments, was embraced in Yellowknife. Participants were very excited about the potential of this technology to assist them with connecting to each other, and to the broader world, despite challenges in the implementation.
- Challenges in the implementation of the Voluntary Sector Portal support to the pan-Canadian pilot project proved a barrier to participants in Ottawa, both from a technological point of view, and because the supports were not offered in French.
- The Nova Scotia participants, particularly the younger ones, used an on-line discussion board over the summer, with nearly 100 postings. They reported that it was a valuable way of staying connected with one another.
- Web-based discussion is a useful supplement to face-to-face leadership development experience, but its value will vary depending on the unique characteristics of the group, assuming that there are no active barriers on place to its usage.

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<sup>15</sup> Particularly those mothers with young children at home.

## **Community Impact**

### **In Yellowknife:**

Based on the participant evaluations and verbal feedback from the group, as well as work they have completed, it is fair to suggest that *Leadership Connex*t was a success in the Northwest Territories, and that participants derived significant energy, skill and insight from the program.

***I think this was a valuable experience that provided me with a lot of the information I need to be a successful and visionary leader.***

The Yellowknife participants as a group had well-developed leadership skills and therefore required a very high level of facilitation and content. They were eager for hands-on activities, time to discuss and explore ideas and concepts, and to collectively develop solutions to local challenges.

The following are the major developments and challenges of Yellowknife Leadership Connex)t, as identified by the group:

1. The group is moving ahead with efforts to form a NWT Voluntary Sector Coalition, although both 'voluntary sector' and 'coalition' are problematic terms for the group. They prefer the term non-governmental organization (NGO) to voluntary sector (VS) and are reticent about using the term coalition due to past failed efforts in this regard. Their initial focus, which emerged out of a discussion on inclusivity, is 'Building Healthy Communities'. The group committed to begin personal outreach with other NWT VS leaders concerning whether there are additional needs that might be addressed by a larger group. *Connex*t participants scheduled a combined in-person/conference call meeting for Nov 16, 2004 to discuss these conversations and potentially plan some sort of community consultation process and strategy for procuring funding for such a meeting (particularly travel costs). The group also plans to use technology to support future collaborative efforts. To this end, individuals have put forward their name as trainees for the Portal Online Moderator training project.
2. The group also expressed hope that *Connex*t would be repeated in the NWT and asked whether it was likely that the facilitators would return. They indicated that there has been significant community interest. The evaluation process on the Pilot was outlined and sustainability issues introduced. No guarantees were made, with regard to either the school or specific facilitators. Two individuals expressed an interest in working on another school in the NWT and, hopefully, facilitating at it. The entire group is interested in receiving updates on this issue.
3. The movie 'The Corporation' became a pivotal piece for this group. Due to circumstances outside the program, it became necessary to show it in three parts, which proved to be fortuitous, in that it allowed the group more time to integrate

the concepts and reach their own learning response. They identified that leadership (for them) means acting on and connecting their personal passions to the larger stories and issues within their community, the Territory, country and world. Their discussion revolved around the voluntary sector as the only sector whose prime motivation is the ‘common good’; the sector that can build broad-based relationships; and the sector which has the potential to deepen civic engagement and the democratic process within communities. They were energized by the notion of civic engagement and critically assessed how far they would go in pursuit of the common good (which was linked back to the Ethics piece of the curriculum).

4. Paradoxically, the suffering depicted in the movie (coupled with a recent community trauma) reinforced the notion that vision and relationship are critical elements of voluntary sector leadership. These were identified as a universal human need – particularly during times of crisis and change. The need for outreach and education (telling their visionary stories and engaging with the stories of other groups and leaders) became a key learning for the group. They explored some present barriers to working with government and aboriginal leaders and groups, and identified the necessary changes they would need to make in order to improve these relationships (ex. ask them, don’t assume we are more healthy, morally superior or have all the right answers, be sensitive to the experience and challenges of other groups, be open to learning from them, we need them more than they need us – explore this, speak your truth, etc.). Additionally, the group came to realize that work with story is a natural connecting point with aboriginal individuals and groups – and that they have much to learn from them in this regard.

One of the most important Ah! Ha! moments happened when one of the participants realized that they (the *Leadership Connex* group) need the aboriginal community far more than the aboriginal community needs them. This changed the tone and focus of the discussion to how to create opportunities to listen to what aboriginal citizens want.

5. Finally, the group found the section on ‘Building a Case for Support’ extremely helpful. Plans were made to use the techniques outlined to pursue both funding and general support for a coalition.

#### In Niagara-on-the-Lake:

Participant and facilitator feedback, as gathered from evaluation results, personal anecdotes and follow-up conversations, revealed Niagara’s *Leadership Connex* to be a very positive experience. There was a high level of enthusiasm and participation by those in attendance. Overall, participants indicated this training was something they had been waiting for, that it filled a large gap in higher level training opportunities. The major developments and challenges revealed include the following:

***I am in a leadership role without much knowledge about that role. This program has given me the confidence I need to be a better leader and manager.***

1. Group dynamics – the ratio of youth participants to more experienced leaders was much higher than anticipated, resulting in a challenge to facilitators as they attempted to focus and engage two groups with very different levels of experience and needs. Consequently, the content was less challenging for those participants of a more senior level. A positive outcome of this gap in experience level was that a mentorship role developed between youth leaders and experienced leaders. This relationship gave new leaders much-needed direction, while reenergizing the mentors.
2. Participants indicated the most beneficial learning components were Building a Healthy Organization, Mind Mapping, Strategic Planning and Building a Case for Support. One participant who came to the school struggling with building a case for support has since gone on to pitch several large funding proposals. Another participant took what she learned of strategic planning back to her organization and has since embarked on a reexamination of their vision, mission and entire future direction.
3. One of the greatest benefits of the *Leadership Connex* as whole was the personal interaction and the connections that developed among participants. Facilitated by group learnings and activities, as well as the sharing of personal projects, participants had the opportunity to network, explore partnerships and generally learn from one another. Some of these relationships are expected to continue into the future, providing support to Voluntary Sector leaders.
4. *Leadership Connex* sparked an interest in future training for the participants. They cited governance, fundraising, human resources management, conflict resolution, fund development, succession planning and negotiation skills as areas of particular interest for further learning.
5. Over the course of *Leadership Connex*, it became apparent that participants would welcome the opportunity to nurture the connections that have been made through future events for alumni. To this end, facilitators are exploring the possibility of holding an alumni dinner in the form of a World Café in the hopes it will continue to foster connections, networking and support, and also provide the opportunity to explore the potential for partnerships.
6. Unlike in Yellowknife, Niagara participants primarily chose to pursue individual projects as part of their leadership journey. Since Niagara's *Leadership Connex*, one youth participant has procured her first position in the Voluntary Sector as Outreach and PR Specialist for the Fair Housing Council of Central New York. In addition, she has begun to work on her *Leadership Connex* goal and has not only

incorporated the Gifted Spirit Foundation, but has applied for charitable status and lined up a significant donor!

In Nova Scotia:

The learning process that was designed for the Nova Scotia group attended to the whole person and was successful in engaging both participants and facilitators in a rich exploration of voluntary sector leadership, for each person individually, and for our changing world. The program was valuable in terms of enhancing participant's sense of themselves, encouraging a more reflective learning practice, and developing specific skills.

1. The program met its objective of encouraging participation from “the next generation of voluntary sector leaders”. More than half the participants were under the age of 35; most were not in executive leadership positions in voluntary sector organizations.
2. The program sought and was successful in facilitating the creation of a learning community that enabled participants to fully express their thoughts and feelings to one another, to the whole group and to take some risks.
3. Participants indicated the most beneficial content pieces of the program were the sessions on interpersonal communication, managing conflict, diversity, organizational health and multi-stakeholder negotiation.

***It was amazing – A true learning experience.***

4. All participants found the personal interactions and the connections that were built over the course of the program of great value; many of these connections are expected to continue.
5. *Leadership Connex* sparked an interest in future training for participants themselves and their organizations. They cited adult education, facilitation, and negotiation as areas of particular interest for further learning.
6. Participants liked the self-assessment instruments and role-playing exercises that were used. The participant evaluations suggest more of these kinds of opportunities for learning should be used in the future.
7. The program experimented with the use of some creative approaches to communication, including exercises involving drawing, painting and the making of collages. These were very successful in stimulating new insights into self and leadership.

## What we learned:

### About social inclusion:

- The Ah! Ha! moment in Yellowknife regarding the relationship between non-aboriginal voluntary sector organizations, and aboriginal peoples and organizations in that community, i.e. that the non-aboriginal organizations need the aboriginal people much more than is the reverse, raises the question about whether social inclusion of aboriginal peoples requires as a pre-condition a reconciliation process, after a long history of colonization.
- Without specific outreach to those parts of the voluntary sector serving marginalized people with Canadian society, it will not be possible to meet their specific needs.
- Given high demands with limited resources on organizations serving marginalized peoples,<sup>16</sup> there are specific challenges to be addressed in marketing leadership development opportunities such as this as relevant, justifying the investment of time and funds.
- Participation in a learning opportunity such as this presents challenges to the participants, particularly for those with chronic illnesses. A significant number of those participants with chronic illnesses, or working for organizations serving those with chronic illnesses, were unable to return for the second part of the program due to their own illness, or illness within their families.
- The provision of leadership development opportunities in rural and remote locations requires the support of high capacity organizations, as occurred in the Yellowknife *Leadership Connex*, for the development, facilitation and delivery of programming. Having an outside partner, who is sensitive to the dynamics of remote/rural communities, is crucial to any successful delivery of Connex in this environment.

***There is no way that remote/rural Canada would be able to pull something like this off on our own.***

### About Voluntary Sector Needs:

- The voluntary sector has a diversity of needs with regard to leadership development, and these are distinct, although several can be met at once through initiatives, as long as the developers and facilitators are clear on their objectives. These needs are:
  - Strengthening the existing cadre of voluntary sector leaders, due to the rapidly changing environment which requires new skill sets (the focus in Ottawa and Yellowknife)
  - Cultivating the upcoming cadre of voluntary sector leaders from younger staff and volunteer within the voluntary sector (the focus in Nova Scotia)

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<sup>16</sup> While most organizations within the VS would identify with this description, there are degrees. Organizations serving aboriginal or visible minority people, or people with disabilities, often have fewer resources when compared with the demand basis, than do more “mainstream” voluntary sector organizations.

- Building relationships across generations for mutual benefit (the focus in Niagara)
- There are high rates of staff turnover within the voluntary sector, so that programs such as this are affected. A significant number of participants did not return for the second residential component because of changes in their employment, and their new employer did not give them permission to complete the program.
- There is a hunger for educational opportunities specific to meeting voluntary sector needs. 96% of Niagara/Yellowknife participants indicated, in their evaluations, that there was a great need for this type of voluntary sector education and training opportunity. Yellowknife participants hoped that it would be repeated for other community members, who were unable to participate due to scheduling conflicts in the first round.
- A key benefit to the voluntary sector is the initial curriculum that has been developed for *Leadership Connex*/*Leadership Réseau*. However, costs of offering the program were even higher than anticipated they would be. Finding a sustainable middle ground, where educational institutions can afford to offer programming (on a break-even basis), and voluntary sector participants and their organizations can afford to pay, will be an on-going challenge.

***Our organization is beginning to value the investment in staff training through the information about Leadership Connex that I have brought back.***

About leadership development:

- While this may be true for all sectors, the voluntary sector participants demonstrated a clear preference for learning opportunities based on adult learning principles:
  - Based on learners' own experiences
  - Allowing learners to set their learning agenda
  - Providing a mix of learning activities to engage the whole person (including skills development, personal reflection, creativity, and action)
  - Small group size (15-20 is best)
  - Learning from each other – which requires the facilitator and agenda to provide time for relationship development to occur.
- Learning is a risk-taking activity. Therefore, programs of this type need to create safe learning communities, where participants can take risks in a (relatively) consequence-free way. This suggests that some aspects of leadership development are best done away from the employment situation.
- While participants appreciated the breadth of materials they were able to take away with them from the workshop (some called it their “toolkit”), it became clear that participants benefited most from in-depth focus on relatively few topics, rather than quick overview of many topics.

About collaboration:

- Collaboration between educational institutions and the voluntary sector takes time, patience, and openness to new ideas. Specific requirements are that a space and context for dialogue to occur is in place<sup>17</sup>, assumptions are set aside, and lots of questions asked, so that a shared framework for working together can be developed. The process must also engender trust amongst participants.
- Prior relationships between the voluntary sector and educational institutions assist with getting the word out to the sector about an opportunity. La Cité collégiale faced recruitment challenges due to interruptions of several years in their voluntary sector offerings.

***It was fantastic to connect with people in the community who are excited and motivated by similar things as me. The planning team, facilitators and guest speakers who participated added incredible value and meaning to this experience. We have begun new journeys towards greatness; multiple multi-faceted journeys that can only lead to positive change.***

About successful implementation:

- Organizations or institutions which mount a program of this level of complexity need the skills, experience, and infrastructure to do so. Close attention to detail is mandatory, given the myriad duties of meals and accommodations, travel arrangements, room bookings, preparation of materials, and so on.
- The passion, dedication, and knowledge of the facilitators are key factors in successful implementation. Facilitators must bring a level of care to the learning experience that enables risk-taking amongst the participants. Facilitators must also be deeply connected to the sector, to understand the perspectives brought by participants (and be able to credibly challenge those perspectives when necessary).

### **What would we do differently?**

Based on the participant and facilitator evaluations, the following changes would be looked at before offering a program like this again:

1. The program would have benefited from more time at the front end for participant recruitment and developing organizational sponsorships. The “commitment phase” (participant application and selection) was good, but needed more time, i.e. at least six months from the point of being announced to the first on-site session. In the future, this longer timeframe will be used for program planning and development. Le plan de marketing pour le programme doit être amélioré

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<sup>17</sup> Niagara’s Centre for Community Leadership has a long-standing Advisory Committee made up of VS leaders and others who care about the sector. A specific subcommittee was established, with recruitment from the VS, to guide the development of the curriculum. Dalhousie University established a VS Advisory Committee specifically for this project.

- pour élargir l'accès des Francophones situées dans les régions éloignées. Élaborer un plan de marketing formel pour la communauté francophone dans les divers secteurs et régions du Canada. Le déploiement de celui-ci doit se faire au moins 6 mois avant l'offre des modules comme tel avec rappels en temps et lieux.<sup>18</sup>
2. The timing of the program would be different. Summer is not the best time of the year for participants to undertake projects. Both their own time and the time and resources available from sponsoring organizations are more limited this time of year. We would also avoid a September session as this is busy month for many people, making it more difficult to make time available.<sup>19</sup>
  3. We would introduce a "leadership model" for participants to work with at the outset of the program rather than hoping one would emerge for each individual. This would help us to delve deeper into the subject of leadership.
  4. Le nombre de fondements théoriques, outils et stratégies à incorporer dans un programme d'une durée de 6 jours ne permet pas l'approfondissement des connaissances et de compétences; il faudrait épurer le contenu et s'assurer du lien entre chaque contenu.<sup>20</sup> We would be more restrained in the number of discrete learning objectives we identified and would give more attention to fewer content items.
  5. We would provide more structure and direction for the individual or group leadership projects undertaken in the interim period between the on-site sessions. While not every participant requires this, for some it would be very helpful.
  6. We would give more explicit attention to articulating the learning outcomes or objectives throughout the course of the program. In other words we would consistently make the link between objectives and learning activities.
  7. In the recruitment process we would give greater attention to gender balance and would seek more participants from visible minority communities.
  8. We would give greater consideration to including, as a member of the facilitator team, an educator from a visible minority group.
  9. A program such as this needs excellent resource materials, particularly background readings specific to trends relevant to leadership in the voluntary

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<sup>18</sup> The marketing plan for the program should be improved to improve access for Francophones situated in regions outside of the immediate vicinity of Ottawa, i.e. for the Francophone community in various regions across Canada. This plan should be implemented starting 6 months before the modules are offered.

<sup>19</sup> Due to delays in receiving the funding, and the time frame limitations of project funding, the project was compelled to have a summer offering for the pilot phase.

<sup>20</sup> The number of theoretical concepts, tools, and strategies incorporated into the original 6-day program did not permit delving deeply into the required knowledge, or achieving competence with the subject matter. It will be important to focus the content more tightly, and tightly align each activity with relevant learning outcomes, theoretical framework, etc.

sector as an instrument for democracy and justice. La présence d'invités pourrait permettre de varier les approches d'enseignement, mais aussi d'apporter d'autres défis propres à ce milieu.<sup>21</sup> While the materials provided by Dr. Balmer were somewhat useful, they were not a good fit with the transformational leadership model of the program. Individual participants could not fit themselves, or their organizations, into the trends presented in the paper.

10. In the curriculum design we see the need for further experimentation with methods for developing greater awareness of what it means to be a voluntary sector leader in a globalizing world.
11. L'appui informatique et l'accès au portail doivent être améliorés; cet aspect du programme n'a pas été géré de façon adéquate et a été une réelle source de frustration pour tous.<sup>22</sup> It may be that the use of Internet connection, given the varied adoption of it between the regions, should be a matter for regional discretion, rather than part of the mandatory program requirements.

***Leadership Connex met and exceeded my expectations and gave me the tools and information I feel I need at this stage in my life to be a better leader.***

### **Recommendations re Voluntary Sector leadership development and expansion of the National Learning Initiative**

A number of recommendations stem from the assessment of the program by participants and facilitators. These are important in terms of future efforts facilitating learning aimed at leadership development in Canada's voluntary sector. These recommendations are directed both to voluntary sector organizations, especially national bodies, and to colleges and universities.

1. The learning process associated with developing competencies for voluntary sector leadership is a complex one. Fundamentally it is not about information transfer or skill development; it is about self-awareness, passion and sense of purpose. Creating the necessary alchemy for transformative learning requires a complex set of ingredients. Great attention needs to be paid to learning processes as well as content, to the commitment and openness of participants and facilitators
2. There is a place for high-profile leadership development programs that require participants to compete for places through an application and selection process. Ideally these should be considered at a national, regional or community level and be oriented to a broad range of non-profit organizations. Such programs can

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<sup>21</sup> Invited guests permit a variety of learning/training approaches, but they also bring their own unique challenges to the learning environment.

<sup>22</sup> Computer support, and access to the portal, must be improved. This aspect of the program was not managed adequately, and was a real source of frustration for everybody.

- stimulate interest in leadership development in the voluntary sector, create public interest and help generate support from public and private sources.
3. Effective leadership development education must challenge program participants, voluntary sector organizations and facilitators. In other words both the content and the process of learning must be challenging, take people (and their organizations) outside of their comfort zones.
  4. Leadership development in the voluntary sector will require a greater commitment of resources than is currently fully appreciated. The “dollar costs” of training is only one element. Other elements include the recognition that VSOs need to invest time, change the way they manage work<sup>23</sup>, and be open to taking risks. VSOs need to invest in longer-term human resources development with a sectoral, not just organizational, focus. Voluntary sector organizations need to identify professional development in leadership training as a priority and make adjustments to allow staff to take part in these opportunities. In recognition that budgets are tight, there could be a cost-sharing arrangement requiring investment from the employee and the organization.
  5. Leadership development involves a personal journey that includes both intellectual and emotional development. Organizations need to encourage skill development associated with particular jobs and personal growth required for real leadership within the sector.
  6. The learning environment created must be a safe one in which participants can voice their concerns and experiment with new ideas and skills. This finding suggests that some aspects of leadership development may be difficult to address within the context of a person's own organization.
  7. While the internet promises to make learning more accessible, the voluntary sector could benefit from a more thorough understanding of the complexities involved, including how face-to-face and distance learning complement one another, as well as a better understanding of the size of the actual versus perceived market for distance learning by voluntary sector staff and/or volunteers.
  8. Building on the model of linking educational institutions and voluntary sector learning, it became apparent that a large part of the success of this program was because it tapped the champions of voluntary sector education and training within the partnering educational institutions. This leads to the insight that voluntary sector leadership development programs will be more effective where they attempt to link the interests and passions of participants, their organizations and the champions of voluntary sector education and training within the partnering educational institution. In other words, more meaningful learning will result when

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<sup>23</sup> For example, if work were to be managed in such a way that individuals shared responsibility within organizations, it would be possible for individuals to take brief “sabbaticals” away from the office, without incurring an organizational set-back.

- educators teach their own areas of expertise and from their own passions not to a prescribed curriculum.
9. One of the recommendations resulting from that study (Niagara Voluntary Sector Labour market study) was to increase the knowledge and respect for the profession of voluntary sector leaders/managers (investigate means of validating the profession such as certification, accreditation, competency development and benchmarks). It was also identified that the sector should apply the recommendations that are evolving from the voluntary sector “National Learning Initiative” that is focused on developing national skills and learning framework for the voluntary sector.
  10. Explorer divers modes de prestation du programme pour rendre le programme plus accessible : cours sur Internet, vidéocassettes, divers sites, diverses durées (par exemple trois sessions de 2 jours).<sup>24</sup>
  11. Créer un programme avec reconnaissance formelle des acquis de la part des collèges communautaires et l’appui formel des Associations provinciales et fédérale de bénévoles et du secteur à but non lucratif. Tenter d’obtenir l’appui et le parrainage des instances gouvernementales municipales, provinciales et fédérales et faire en sorte que ce programme devienne une exigence lors de l’embauche et du plan de perfectionnement des leaders des secteurs bénévoles, communautaires et à but non lucrative.<sup>25</sup>
  12. Fournir des ressources en français pour les leaders francophones. Par exemple préparer et publier un guide à l’intention des leaders communautaires; tenter d’obtenir du financement de Patrimoine Canada pour parrainer cette initiative.<sup>26</sup>
  13. Renforcer la composante appui informatique du programme : par exemple créer un site Internet avec ressources dans les deux langues officielles, réseau d’échange de pratiques, affichage d’articles, d’outils pratiques, création d’un forum d’analyse continue des besoins, établir un principe d’adhésion annuelle pour avoir accès au site Internet, promouvoir activités et offres de modules à divers sites, etc.<sup>27</sup>

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<sup>24</sup> Explore a variety of ways to offer the program, to make it more accessible: Internet courses, videocassettes, multiple locations, a variety of types of residential offerings, i.e. three sessions of 2 days each.

<sup>25</sup> Create a program that provides formal recognition by community colleges and formal support by provincial or federal VS associations/organizations. Try to get the support and sponsorship of municipal, provincial and federal governments, to see to it that the program becomes a requirement for hiring, and part of a professional development plan for leaders of VS sector organizations.

<sup>26</sup> Provide resources in French for Francophone leaders. For example, prepare and publish a guide for the benefit of VS leaders; obtain financing from Heritage Canada as sponsors of this initiative.

<sup>27</sup> Reinforce the computer/technical support component of the program. For example, create a website with resources in both official languages, chatrooms for exchanging practical information, posting articles and practical tools, creating a forum of continuing analysis of needs, establish a principle of annual membership to have access to the website, promote activities and offer modules on multiple sites, etc.

***I met new people, gained many new skills, had a much-needed break from my work and the opportunity to build confidence and a new plan for action.***

**Next steps:**

**In Niagara:**

Following the success of *Leadership Connex* in Niagara, the Centre for Community Leadership approached a local foundation to sponsor a Youth Voluntary Sector Leadership School, resulting in funding in the amount of \$59,000 to host the school in 2005.

**In Ottawa:**

Plans are underway to replicate and build on the success of *Leadership Réseau* in 2005. Marketing plans are underway. The pilot participants are anxious to serve as mentors and advisors to the project, as well as to find a way to work with La Cité collégiale to continue their own learning.

**In Yellowknife:**

Negotiations are underway to determine whether or not the “Caring Across the Boundaries” workshop developed by the First Nations Child & Family Caring Society of Canada would be appropriate to address the needs identified by the group.

Participants have signed up for Moderator Training with the Voluntary Sector Portal, to facilitate their on-going use of the technology.

Although participants expressed an interest in having *Leadership Connex* offered in their community again, and a number were interested in assisting with the facilitation, no proposal has been forthcoming to date.

**In Nova Scotia:**

In Nova Scotia, Dalhousie University and Tatamagouche Centre will continue to collaborate in their voluntary sector leadership development efforts and hope to offer the program again, possibly for a sub-sectoral constituency. Funding is currently being sought to support broad access to such a program.

In addition, both organizations are actively incorporating voluntary sector leadership development into their strategic planning with the intent of gaining recognition as national resource for voluntary sector learning. They are also applying their own experience from the pilot project to the design of existing and new workshops and courses.

***The program was thought provoking and personal – the best way to really elicit good participation and learning from people.***

## **Appendix A: At a glance Comparison of pan-Canadian pilot project locations**

<b>At a glance comparison</b>	<b>NLI Pan-Canadian Pilot Project Locations</b>			
	Niagara-on-the-Lake, ON	Yellowknife, NWT	Ottawa, ON	Nova Scotia
Lead organization	Niagara College Centre for Community Leadership (CCL)	Niagara College Centre for Community Leadership	La Cité collégiale	Dalhousie University, Henson College of Continuing Education
Community partner	CCL Advisory Committee	YWCA of Yellowknife	Not applicable	Tatamagouche Centre
Number of participants (start/finish)	27/22	16/12	10/10	20/14
Facilitator(s)	Glory Ressler Lyn Russo	Glory Ressler (I & II) Bev Suderman (I) Carol Pupo (I) Lyn Russo (II)	Francine Charland	Wayne Edgar (I & II) Grant MacDonald (I & II)
Guest speaker(s)	Ken Balmer Janice Wismer	Ken Balmer	Ken Balmer	N/A
Training location	Niagara College Glendale Campus and residences	Trappers Lodge Retreat Centre, operated by local Roman Catholic Diocese	La Cité Campus and residences	Tatamagouche Centre
Social inclusion data by organizational focus	Homeless: 7 Refugees: 4 Immigrant: 7 Visible minorities: 7 Aboriginal people: 6 Youth: 16 Rural & northern: 7 Francophone Cdns outside of Quebec: 2 People with chronic illnesses: 7 People living in poverty: 9 People w. disabilities: 8 Unemployed: 7 Issues of sexual	Homeless: 6 Refugees: 1 Immigrant: 3 Visible minorities: 6 Aboriginal people: 11 Youth: 8 Rural & northern: 11 Francophone Cdns outside of Quebec: 2 People with chronic illnesses: 5 People living in poverty: 7 People w. disabilities: 9 Unemployed: 9	Francophone Cdns outside of Quebec: 10  More detailed information not available	Homeless: 3 Refugees: 1 Immigrant: 2 Visible minorities: 2 Aboriginal people: 1 Youth: 9 Rural & northern: 4 People with chronic illnesses: 2 People living in poverty: 6 People w. disabilities: 5 Unemployed: 8 Issues of sexual orientation: 3 Other: 3

	orientation: 1 Other: 3 (International, environment, & underemployed professionals)	Issues of sexual orientation: 3 Other: 1 (At risk youth)		(Low education levels, rural natural resources)
Social inclusion data by individual participant	Immigrant: 1 Visible minorities: 2 Youth: 9 Rural & northern: 2 Francophone Cdns outside of Quebec: 1 People w. disabilities: 1 Unemployed: 1 Gay/Lesbian/Bisexual or Transgendered: 1 Other: 1 (Woman)	Homeless: 1 Immigrant: 2 Visible minorities: 1 Aboriginal person: 1 Youth: 1 Rural & northern: 6 People w. chronic illness: 1 People living in poverty: 2 People w. disabilities: 1 Unemployed: 2 Gay/Lesbian/Bisexual or Transgendered: 1 Other: 3 (Overworked Woman; single mother)	Francophone Cdns outside of Quebec: 10  More detailed information not available	Immigrant: 1 Visible minorities: 1 Aboriginal person: 1 Youth: 2 Rural & northern: 1 People w chronic illness: 2 People living in poverty: 1 People w. disabilities: 2 Unemployed: 1
Marketing strategy	Internet Personal invitations Fax? Flyers	Personal invitations	Newspaper advertisements	Newspaper advertisements

Selection strategy	Application	Application	Application	Application Personal statement Organizational statement Selection
Theoretical framework/ model	Generon	Generon	Generon	Theory-Action- Reflection
Project contract amount	81,756	Part of CCL contract	36,000	27,000
In-kind contribution amount (projected)	38,063	Part of CCL contract	17,000	16,000
In-kind contribution amount (actual)	97,012	N/A	14,558*	26,725
Tuition fees collected	7,100	0	5,000	4,700
Project cost	\$185,868	Part of CCL contract	\$55,558	\$58,425

\*This amount is probably under-reported, due to changes in personnel over the course of the project, combined with a rigid accounting system, which would not permit variance from originally budgeted amounts.