

National Learning Initiative

A national skills and learning framework for the voluntary sector

VOLUNTARY SECTOR LEADERSHIP COMPETENCIES

Examples, Current Challenges, Complexities
and Learning Outcomes

Discussion Document
Revised September 2003



*A collaborative project of the
Association of Canadian Community Colleges
and the Coalition of National Voluntary Organizations*

Voluntary Sector

Canada

Funded by the Government of Canada
through the Voluntary Sector Initiative

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INTRODUCTION

This document contains competencies that describe a leader in the voluntary sector in Canada. Not all competencies will apply to all people, or all circumstances, at the same time because the voluntary sector is “messy” – its leaders respond to simple, complicated and complex issues and needs. Yet, to be effective, leaders must have a global and holistic understanding of leadership (their role as leaders), as well as a full understanding of the world around them.

For each competency, some real-life illustrations are provided as examples. Examples, stories, and vignettes illuminate each competency and provide connections to other competencies. These are not footnoted or researched extensively; they are simply meant to provide a better understanding of the competency and related challenges. The list is small -- many more examples can be identified by the reader and discussed with others.

In addition to these leadership competencies, leaders must have an extensive knowledge of their organization’s purpose and issue. They also must be able to analyze which issues and information are important for them and their organizations.

Some of the challenges related to each competency are identified. Some are simple; others are complex. They often conflict each other. Such is life in the voluntary sector; this is the context in which a leader works. Many more challenges need to be identified and discussed. We can learn by being aware of and understanding these challenges. History and experience are great teachers.

Lastly, a list of learning outcomes is identified for each competency. What do you need to learn to gain each competency? These learning outcomes have been developed for students who may have no experience in the voluntary sector, but who wish to learn. The potential students may come from a variety of backgrounds and have a variety of levels of expertise. These learning objectives are general, not specific. They are not complete; other learning objectives will emerge during your reflection and discussions. They are listed here to start discussion.

This document is designed to be a discussion starter; these competencies and learning outcomes are not definitive. We have only just begun to determine the core competencies for leadership in the voluntary sector across the country, in sub-sectors and in differing sizes of organizations. It is hoped that the detail contained in this document will allow leaders and educators to validate, modify, and elucidate more complete competency statements and learning outcome statements. We encourage you to give us feedback, ideas and suggestions.

Perhaps through reflection and discussion we may consider different ways for individuals to learn, different ways for colleges and universities to engage with the voluntary sector, and different ways for the sector to adapt and respond to our rapidly changing and expanding world.

Do you wish to build your skills in these competency areas?

Some readers may be daunted by the competencies for leadership outlined in this document. It is possible to build your skills in those areas where you would like to develop more strength. This can be done in the context of your current position, through volunteer work, through finding a mentor, through networking, and by engaging in a variety of formal and informal education processes.

One way to build skills is to join organizations, whether as part of your current position, or as a new volunteer, to take on new work tasks which will strength your abilities. The benefits of doing this include:

- Representing your organization, by collaborating with others for reasons important to your organization's mission
- Gaining experience
- Developing a valuable network of contacts
- Keeping up with the latest developments, i.e. professional development
- Pursuing your personal interests/passions.

Be cautious about what types and the numbers of organizations to join:

- Don't overextend yourself, and be prepared to put in the required time on your commitments, to do the work completely and well.
- Choose wisely in all cases. Some committees are a waste of time.
- Use caution when joining coalitions, because they "may breed strange bedfellows. ... Do not risk your personal reputation, or that of your NFPO¹, by joining the wrong group for the right reasons."²

Mentoring another person, or finding a mentor to work with you to achieve certain specific professional development goals can be a very meaningful and valuable way to develop skill sets. Because the focus in effective mentoring relationships is on learning, both the mentor and the mentee are continuously challenged to reflect on beliefs, values, and actions. The benefit, therefore, accrues to both parties.

Both formal and informal mentoring relationships are available. Formal mentoring programs tend to be found within larger organizations, like the United Way of Canada or YMCA Canada. Informal mentoring relationships tend to be initiated by the individual who wishes to be mentored. In either case, the objectives of the mentoring relationship need to be clear to both parties, usually through some level of negotiation. Establishing a timeframe within which the objectives will be accomplished has been essential to an effective relationship.

¹ NFPO = Not for profit organization.

² Wright (1992) *The Not-for-Profit CEO: A Survivor's Manual*. Portland, OR: C3 Publications, p. 109.

A variety of formal and informal learning opportunities are available through community colleges, cégeps, universities and voluntary sector organizations. Check with your local institution about courses available in your area of interest, or check out some featured offerings through http://www.nvo-onb.ca/projects_initiatives/nli/On-Line_Inventory/tofc_e.shtml.

Feedback Request

This discussion document is the beginning of determining the core competencies of leadership for the voluntary sector across the country, in sub-sectors and in differing sizes of organizations. The details in this document will hopefully allow leaders and educators to validate, modify, and elucidate more complete competency statements and learning outcome statements.

We count on your responses and suggestions to gradually move towards a more accurate and helpful document that can guide leaders and trainers across the country. Essential, core competencies will need to be adapted to each sector, region and organization.

The Learning Outcomes listed in this document are the beginning of more complete learning outcome statements, which we encourage the reader to develop and share with us. Again we are not aiming at comprehensiveness but rather at inspiring creativity about the key competencies and learning outcomes that are needed by all. We encourage you to give us your feedback, ideas and suggestions.

- ⇒ Which of the competencies are priorities in the sector?
- ⇒ Are there competencies and approaches to learning the competencies that are missing?
- ⇒ Are there some not stated clearly?
- ⇒ Which are the most essential ones?
- ⇒ Which are the ones where the size or the type of organization make a large difference in the type of skill or level of mastery needed?
- ⇒ Etc., etc.

We look forward to hearing from you. Please send your feedback to:

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ABBREVIATIONS

- VS = Voluntary Sector
- VSO = Voluntary Sector Organization
- ED = Executive Director
- FR = Fund Raising
- HR = Human Resources
- NVO = Coalition of National Voluntary Organizations
- ACCC = Association of Canadian Community Colleges
- NLI = National Learning Initiative for the Voluntary Sector

BACKGROUND –

THE NATIONAL LEARNING INITIATIVE

The Challenge

While excellent programs to develop the knowledge, skills and attitudes of the Voluntary Sector exist in both Voluntary Sector organizations and within Canadian academic institutions, these programs are isolated from one another, difficult to access and underused by many voluntary organizations and staff. At the same time, there is an increasing recognition of the need for relevant, more accessible, recognized education and training by the sector within the context of the knowledge economy and the growing complexity of leadership demands.

In research undertaken by the Human Resources Committee of the Capacity Joint Table, Voluntary Sector Initiative, the need for succession planning was highlighted in light of projected demographics, with a surge in retirements predicted within the next ten years. In addition, the 1990's were a decade of recession with consequent hiring freezes. In many organizations, no logical successor is coming up through the ranks. Of particular relevance to the Voluntary Sector, Canada experienced downsizing of government with downloading of services to the Voluntary Sector. All of these factors have combined to create a leadership crisis in the voluntary sector. The quickest, and most effective, way of developing leadership within the voluntary sector is through enhanced education and training specifically available to meet the needs.

The Vision

The overall vision of the National Learning Initiative for the Voluntary Sector (NLI) is “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”. As its first area of focus, the NLI,

a partnership of The Coalition of National Voluntary Organizations (NVO) and the Association of Canadian Community Colleges (ACCC) chose to focus on leadership.

Leadership Competencies

As part of its focus on leadership, the National Learning Initiative undertook the first ever practitioner-driven voluntary sector leadership competency identification process. To find voluntary sector leaders, we engaged in a national nominations process. We had 136 nominators who identified 396 voluntary sector leaders. Of these we selected 100 to receive invitations, ensuring a good cross-section of the sector in many ways:

- Geographic
- Sub-sectoral diversity
- Small, medium, and large organizations
- Scope of organization: local, regional, provincial, national, international
- Special outreach to organizations serving the following communities: people with disabilities, aboriginal peoples, visible minorities, immigrants, and francophones living outside of Quebec
- Service delivery and advocacy organizations

Sixty-four leaders participated in the two-day workshops, identifying the competencies they needed to be effective in their positions as Executive Directors or other senior staff positions. For our purposes, competencies are defined 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 those competencies which are common across the voluntary sector, irrespective of regional or sub-sectoral differences.

This discussion document is a meditation, and basis for discussion, on what these competencies mean for the day-to-day performance of a voluntary sector leader. We

share these thoughts with you in an attempt to stimulate thought on the nature of leadership in the voluntary sector:

- If you are a voluntary sector leader, it is our hope that the examples and descriptions contained here will stimulate your reflective practice.
- If you are the President of a Board of Directors, it is our hope that the description of the competencies required to be an effective Executive Director will assist you to understand your staff better.
- If you are a voluntary sector organization offering training to your membership, it is our hope that the material here will be of use as you develop new programs or materials.
- If you are an educational institution, it is our hope that this material will prompt a review of existing programming, to validate much of what is already there, and to challenge you to respond to the needs of the sector where you find room for improvement.

Given the long list of competencies identified, do all leaders need all these competencies? There is no clear answer. Some people argue that no single individual can perform all of these competencies, and therefore, given the shared leadership model in the voluntary sector, it is important to build a leadership team that can embody all these competencies. Others argue that individual leaders are required to demonstrate their abilities in all of these competency areas, and more, every day, but no single individual can be a “top performer” in all areas. Therefore, the emphasis on self-knowledge is so important. The voluntary sector leader, based on his or her self-knowledge, can ensure that their personal areas of weakness are compensated within a larger team. Clearly, in some organizations, certain competencies will be more important than others at various times.

We must remind ourselves also that the competencies listed here do not reflect all the competencies an individual leader would require to perform well in their job. In addition to the core competencies listed here, an individual leader would need to have competencies in the specific area of focus of the organization for which s/he works (children’s issues, environment, international development, etc.), as well as

competencies related to the community in which the organization is based, and to the scope of the organization. If the organization works at a local or provincial level, it will be important to have competencies in the areas of municipal, provincial, and federal law (for example) as they apply to the specific organization and its area of focus.

Next Steps

The NLI is happy to have achieved the milestone of being able to roll out the competencies for leadership in the voluntary sector. Our challenge now is to bring them to life! Over the course of the next few months, we intend to do the following, based on the competencies:

- Develop a sample position description for an Executive Director;
- Develop a sample performance evaluation tool for Boards to use with their senior staff;
- Develop a sample self-assessment tool for individuals who are contemplating advancement within the voluntary sector, for them to determine areas needing further development;
- Offering a “train the trainer” seminar to be able to roll out these competencies for leaders by leaders in the sector.

A number of other initiatives are in the works also, pending the availability of funding:

- Offering pilot educational offerings, through selected educational institutions; and,
- Pilot projects to assist Boards of Directors while they are going through the recruitment process for their senior staff.

Acknowledgements

The National Learning Initiative gratefully acknowledges the financial support of the Capacity Joint Table of the Voluntary Sector Initiative, and the Government of Canada, for the funding that has made this project possible.

We are also grateful for the support and assistance of our 35 Advisory Committee members, who have donated a lot of their time in assisting us to formulate the research process, reviewing and critiquing the documents, and representing the NLI in their own communities and networks. Special mention goes to Mr. Patrick Merrien, of Cégep de Sorel-Tracy, who convened a group of voluntary sector leaders in Quebec to identify examples of the competencies in action in French Canada.

We are also grateful for the sterling quality of the original research work completed by the EcoSol consulting team, ably lead by Diana Smith, with assistance from Chloe O'Loughlin (the author of this document), Lee Anne Johnstone, and Pierre LaCroix. During the process, this team went above and beyond the call of duty to ensure a great product!

Lastly, we are also grateful to you, the reader, for participating in this enterprise. We welcome your thoughts and feedback on this document, or on the NLI in general. Please send your comments to bsuderman@nvo-onb.ca.

BELIEFS AND VALUES



Values and beliefs influence the behaviour of leaders, and their choice of strategies. The values and beliefs identified here affect the skills and approaches leaders bring to every component of their work, as outlined in the four competency areas in this diagram. They also apply these values and beliefs to every level at which they work: self, organization, community and world. In effect these beliefs and values constitute the "heart" of what a voluntary sector leader does:

- ***SOCIAL RESPONSIBILITY***
- ***SUSTAINABILITY AND SELF-SUFFICIENCY***
- ***BUILDING CAPACITY***
- ***INDIVIDUAL ETHICAL AND PRINCIPLED BEHAVIOUR***
- ***INCLUSION AND DIVERSITY***
- ***PASSION AND COMPASSION***
- ***COURAGE***

SOCIAL RESPONSIBILITY

~A leader believes in and values improving life in the community~

Examples

- For many years, overseas development organizations provided services that they believed to be best for a community, e.g. water pumps. But because the services often were not requested, or were not a community priority, they were not used or cared for. Now the VSOs are much more socially responsible and are providing services that are community priorities that build self-sufficiency, e.g. Heifer International, Street Kids International's bike courier programs, Seva Canada, and micro-finance systems.
- Oxfam advocates for a WTO policy that allows countries to skirt global patent rules when a national emergency is invoked. This means that countries can produce cheap drugs for AIDS, etc. (Brazil declared an emergency, avoids patent rules, makes its own AIDS drugs, distributes them free, and, as a result, cut its AIDS death rate in half between 1996-99.)
- AIDS and anti-smoking movements both advocated on behalf of the whole community (not just an identified group) because they believed these were social issues affecting all of society. Also they valued both radical as well as traditional/mainstream groups and strategies.
- The Union of Quebec Agricultural Producers, Sainte-Elizabeth branch, worked with Suco Mali to enable a village in Mali to create its own plan for cooperative agricultural development, starting with a loan which was managed democratically.

Current challenges & complexities

- Social responsibility requires that VSOs respect local cultures, seek to identify common good, encourage responsible corporate citizenship, engage in fair exchange and ensure that others do the same, encourage social welfare rights and services, champion human rights, and foster economic growth and development.

- Leaders must engage in on-going self-critical analysis and ask the question "Are we (or Am I) actually 'doing good'?"
- VSOs and corporations are challenged to deal with social unrest, corruption, employment of unskilled labour, and cultural dislocation.
- Some VSOs do not do good work (e.g. they fund terrorism activities). The voluntary sector needs to have a system of ensuring that social responsibility is a bench mark of the sector; otherwise credibility will be lost.
- VSOs must work with local communities and a variety of governments.
- VS is seen by some as bureaucratized and a 'culprit' too. As a result, individuals interested in social change no longer look to the VS first. There are options, e.g. anti-globalization movement and the Second Superpower movement, for young passionate people.

Learning outcomes

1. Be aware of your own values re social responsibility
2. Start to become well-read and up-to-date on social, cultural, environmental and economic issues
3. Be aware of others' personal and organizational beliefs about social responsibility.
4. Be aware of how your personal values and actions impact on others' values re social responsibility.
5. Be aware of principles related to corporate and governmental social responsibility; ensure that you and your VSO abide by these principles.
6. Be aware of gaps in knowledge and groups who are missing from important discussions.
7. Allow time for courageous conversations e.g. about social responsibility and the sector

SUSTAINABILITY AND SELF-SUFFICIENCY

~A leader works towards sustainability and self-reliance in their organization, in the community and globally~

Examples

Sustainability in the community

- Seva Canada provides eye surgery services in Nepal, India and Tibet. They build partnerships to respond to locally defined problems with culturally sustainable solutions. Initially Canadian ophthalmologists travelled to these countries and provided these services, now they train local people to do the surgery. Also, initially they purchased eye lenses (intraocular lenses) in other countries for \$10 each, now they have helped to build a local manufacturing company where they make their own lenses for \$1 each, and sell them abroad to make a profit that helps them to provide more local services for themselves.
- In Sorel-Tracy, the "Atelier du chomeur" organized existing recycling mechanisms in the community, and established a recycling sorting centre for Quebec.
- David Suzuki Foundation promotes environmental sustainability by working with First Nations leaders on issues such as logging, fish farms and saving habitat for wild salmon
- In the 1970s, Mohawk people of Kahnawake in Quebec were experiencing a decline of their language; it had been replaced by French, then English. In 1978, they established the Kanien'kehaka Raotiohkwa Cultural Centre to preserve their cultural heritage. In 1980, they established a Mohawk immersion program to reintroduce the language to younger people - this was the 1st Aboriginal language immersion program in Canada and is a model for other Aboriginal communities in North America.

Organizations for which sustainability is no longer appropriate

- Small VSOs that decreased isolation of rural woman (thru quilting circles, canning bees, etc.) have recently closed because woman now work off the farm or are

connected in other ways, e.g. internet/e-mail. Closing these VSOs was done with care and grace, and the lives and work of these women valued.

- In the early 1900's there were VSOs that provided support, education, and funding for polio research. Once polio was eradicated in North America these VSOs closed. Recently post-polio syndrome has re-emerged, and VSOs that provide support to these individuals have been initiated.

Current challenges & complexities (Sustainability of VSOs)

- Need to balance organizational sustainability & 'putting themselves out of business' with 'protecting staff jobs'
- Current trends show that younger people want VSOs to find solutions, not to provide services. For example, younger people would prefer that corporations are knowledgeable about training disabled people rather than having separate VSOs that train people with disabilities for jobs. If this trend continues, it may be that these VSOs are not sustainable.
- VSOs are highly dependent on certain funders, are not self-reliant, not sustainable. Need financial diversity.
- To be sustainable, VSOs must be comprised similarly to their community; requires time, funds, skills, & work.
- Leaders need to understand facts, principles, interrelationships and responsibilities re sustainability
- Leaders need to be knowledgeable re social, environmental, cultural, economic issues locally and globally.
- Leaders and VSOs need to consider the long-term consequences of the actions they take today.

Learning outcomes

1. Allow time to consider how to put your VSO out of business.
2. Define sustainability principles (financial, environmental, social, cultural, ecological footprint, etc).
3. Include and empower people, build capacity. Set a personal and organizational sustainability vision.

4. Diversify a VSOs funding base
5. Manage Human Resources issues re organizational sustainability: Staff movement e.g. career development, procedures to replace departing ED/staff, filling temp vacancies when staff take leave (e.g. maternity/paternity/sick leave), capturing corporate memory, orientation of new employees, succession planning

BUILDING CAPACITY

**~A leader builds capacity at all levels—
individual, organization, sector, community—
and has ability to inspire others~**

Examples:

- BC Community Living groups have developed a program: (1) individuals with developmental disabilities plan for services & help they need and (2) government funds go directly to them so they can purchase their own services & help (rather than the money going directly to services). This enables individuals to have power over their own lives, choice and money to pay for the services and support that they choose.
- Carnegie Centre's Advocacy Program advises individuals on poverty entitlements. They train street people to provide this service at Carnegie and other VSOs. This builds the capacity of the client (by obtaining money/services) and the service provider (through training for employment).
- Since its founding, Canada's Street Kids International has worked around the world to enable the participation of the most disadvantaged children and youth in decision-making about their own lives.
- Capacity building of an individual is not always the best approach: Community Legal Assistance Society needed a lawyer to practice Disability Law. The Selection committee - 100% people with a disability - short-listed 4 lawyers (3 with disabilities) and hired the best person for the job - an able bodied person. They felt she'd win the most cases, thereby building the capacity of the sector.
- The collective for a Quebec without poverty (1,610 organizational members - 235,000 individuals have signed petitions) forced the adoption of a law to tackle issues of exclusion and poverty in Quebec (Bill 112).
- Chidi Anselm Odinalu, speaking re human rights groups in Africa, observed how poor and/or oppressed people are seldom part of inclusive/participatory struggles for justice, and that often the VSOs exclude the participation of the

people whose welfare they claim to advance. "Human rights activism is increasingly a certificate of privilege."

Current challenges & complexities

- VSOs need to value learning and development. Funders need to support this.
- Staff/volunteers/board/clients need to allocate the time to take training/education and to grow and develop
- Leaders need to empower the less powerful by providing financial support, staff support, and information
- Less powerful groups need to have more representatives than powerful groups. Leaders need to understand 'power reversal' i.e. individuals who have traditionally had no power are given more power than others through more training, more support, more people on the board, etc.
- Leaders need to balance empowering individuals with hiring people with expertise.
- Capacity building develops innovation: individuals become more aware of trends, context, the competition, other organizations, & issues. VSOs should allow time for reflective practice & courageous conversations.
- There can be risk and costs involved with capacity building. For example, hiring individuals with complex needs may incur risks and/or costs, e.g. mental illness/MS/head injury/physical disability
- Leaders need to understand elements of power and control when building capacity, e.g. who decides when someone is ready for capacity building? For example, for First Nations groups, self-determination, decision-making and self-government precede sustained social and economic development.
- Leaders make a judgment when deciding something/someone needs improvement. Need self-awareness.

Learning outcomes

1. List individual learning styles
2. Analyze adult education principles
3. Implement orientation and training programs
4. Develop a culture of learning
5. Demonstrate good interpersonal communication skills
6. Hire/support non-traditional workers/staff
7. Provide opportunities for creativity and courageous conversations for board/staff/volunteers
8. Manage staff movement within VSO
9. Analyze risks related to building capacity

INDIVIDUAL ETHICAL AND PRINCIPLED BEHAVIOUR

~A leader acts ethically and with principles, e.g., integrity, honesty, fairness, equity, trust, transparency, and accountability~

Examples

- Coordinator of Public Education at Volunteer Society is asked to coordinate a workshop on Gun Safety for the Hunter's Education Society although she is against hunting.
- An anti-violence VSO received a letter from a woman stating that their male Executive Director had taken advantage of her while in a professional-client relationship. The board split over whether 'a woman should be believed' or 'a man is innocent until proven guilty'. Board members resigned based on their personal principles.
- A kidney patient was going door-to-door with a Kidney Foundation receipt book, collecting donations for himself. He showed the fistula in his arm to explain dialysis and get sympathy and donations. Kidney Foundation had to decide whether to prosecute the kidney patient and how they could protect their name.
- A secretary for the Director of Social Policy at a YWCA would not type letters about abortion for the Director, because she felt that it compromised her personal principles about abortion.

Current challenges & complexities

- Society is extremely complex; there are many ethical issues and dilemmas in the VS.
- Challenging ethical issues involves personal and organizational risks.
- Leaders are often unaware of their own values and how they differ from others.
- Leaders may have different personal values than their VSO
- Issues, such as funding, often decrease a leader's ability to be ethical and tenacious in difficult circumstances
- Leaders need time and space for reflection and courageous conversations

- Leaders and VSOs need to understand the tensions between building community and potential loss of individual freedoms.
- Leaders often do not know how to handle unethical actions and situations.
- Leaders need to be aware of their own personal values that they are unwilling to compromise on and be willing to stand firm.
- Leaders and managers often fall back to moral relativism for fear of insulting a culturally mixed group, thereby not talking about our ethics, which most often determine our choices.

Learning outcomes

1. Be aware of your own values re ethical and principled behaviour. Be aware of those about which you are unwilling to compromise.
2. Be aware of how your personal values impact on others.
3. Be aware of your own self-interest in making decisions for your VSO.
4. Be aware of others' personal values about ethical & principle behaviour.
5. Explore your actions if your VSO makes a decision(s) that you can't support.

INCLUSION AND DIVERSITY

~A leader believes in inclusion and diversity~

Examples

- 30% of Community Living Association's board members have a mental handicap. There is a staff person who supports these individuals, and provides information, training, etc.
- At the Quebec Citizens Forum, Spring 2002, the assemblies were structured in such a way that 2/3 of the participants were people living in poverty.
- Guardianship Committee in BC selected key individuals to represent various perspectives. Murray Charlesworth, a self-advocate, refused to represent 'all disabled people in British Columbia'; he suggested that all disabled people be given the opportunity to participate in designing laws that would impact on their lives. This resulted in four thousand people developing legislation that is the best in the world.
- Inclusion may be difficult, e.g. in the past, 45% of the Canadian Mental Health Association's staff in BC had a mental illness. One became manic and sued CMHA for \$10,000.
- In 2002, a survey of First Nations child and family service agencies serving 47 First Nations in BC found that only 2 agencies, representing 7 First Nations, had had contact with non-Aboriginal VS services in the past year. The remaining 40 First Nations, it is assumed, had no contact.
- Vancouver People with AIDS (a VSO run for and by people living with AIDS) were very effective when they provided advocacy and support, but not effective when they provided direct service, built buildings, etc. Illness, death, loss and grievance made it impossible for them to be effective. When services were transferred to AIDS Vancouver, they could re-focus on their strengths.
- People speaking 'on behalf of people with schizophrenia' often say different things than the person e.g. Family members say that they want medication/forced treatment when their child is ill, psychiatrists say their patients want the best medications, service providers are saying that their clients

want the best services, but the person with schizophrenia genuinely may want the right to try to live in the community, unmedicated, without services.

- At G8 conference in 2001, British Secretary of State for International Development asked, "Who is better placed to speak on behalf of the poor: middle-class white people...or the elected representatives of the poor of Africa themselves?"

Current challenges & complexities

- The legitimacy of VSOs depends on inclusion, yet VSOs are not clear if they speak as the poor/oppressed, with them, for them or about them.
- Diversity means more than colour, language, religion and spirituality, sexual orientation, etc., it also includes diverse points of view
- Groups often choose NOT to be included. Need to examine Canadian history, discuss why groups were, and continue to be, excluded and disempowered, who benefits from exclusion, and the dynamic tension between exclusion and inclusion.
- Inclusion has risks and costs. Power imbalance and inequity are big issues, with no easy answers
- Including people is not enough (e.g. 1 person with head injury on a board is a power imbalance.) True inclusion means involving more disadvantaged people, more training, information and support.
- Inclusion means involving people from the concept stage, not just to sign off at the end of the process.
- Often only the most privileged of a poor/oppressed group participates and makes decisions for the others.
- Small issues may be roadblocks to inclusion, e.g. poor people cannot attend meetings, because they have no bus fare, no food money.
- The desire to be inclusive often leads to inertia or ultra-democracy.

Learning outcomes

1. Be aware of your own personal values related to inclusion and diversity.
2. Examine social inclusion, define concepts e.g. power reversal, participatory democracy
3. Examine the benefits of excluding individuals or groups of people
4. Encourage diversity of opinions, respect contrary opinions, manage/live with conflict
5. Know who should be included in a process and who should not (e.g. funders, government)
6. Know how to add people as the process develops.

PASSION AND COMPASSION

~A leader is sensitive, empathic, compassionate, optimistic, persistent, and passionate when working for issues, causes, people and the sector. To have these attributes a leader has an obligation for self-learning— to be well-read, grounded and informed~

Examples

- Mary Gordon, a Newfoundland native, founded her project, Roots of Empathy, 7 years ago as an emotional literacy program aimed at reducing childhood aggression, and ultimately breaking the generational cycle of abuse. Using infants and their parents in the classroom setting, Roots of Empathy has thus far been successfully launched in 133 Canadian public schools, reaching more than 4,000 children in five Canadian provinces. One aspect of the program involves a visit by a baby and parents once a month for about a 10-month period. Gordon believes that newborns are best at teaching kindness. Classes will learn to take care of newborns in the hopes that, as they grow up, they'll think twice about hurting others. The program teaches the kids to be able to label how they're feeling and to then start to think how someone else might be feeling or to help a person.
- In the late 1800's the Children's Aid Society of New York, sent orphans and children of poor, single mothers on trains, "The Orphan Trains", across the American southwest. The children would be dressed up and paraded in front of townsfolk, hoping to be adopted. The lucky ones were adopted into loving homes; the others were given into white slavery. Modern day adoption legislation resulted from these Orphan Trains. Yet these activities continue, e.g. adoption parties where children dress up and mix with potential parents at a party. Today children participate in making videos about themselves telling viewers why they should be adopted; these are displayed on the government of Alberta's adoption web site.
- The Quebec Network of Alternative Resources was developed to work together with, and support, people suffering from severe and prolonged mental illness.

- During an international on-line course on advocacy and lobbying an Indian paper-picker asked a BC environmentalist to describe a forest (she did not know what it looked/felt like.) He lay in a forest for 4 hours so he could respond well to her request. He fell in love with the forest and became passionate in his lobbying.
- In May 1994, 31 yr old Randy Stoltmann was killed in a mountaineering accident, Canada lost the man who had fought most passionately & effectively to rescue old-growth forests. In 1954, loggers clearcut three quarters of the ancient forests of Vancouver Island. Only Carmanah survived. First the loggers offered a mere 245 acre sanctuary of ancient trees; when the fight was over, the entire 16,630 acre Carmanah Valley was declared safe from logging.

Current challenges & complexities

- Compassion sometimes leads to the development of paternalistic programs and inappropriate decisions.
- Leaders need to balance the need for empathy with the need to achieve organizational goals.
- Leaders may need to temper passion with facts and strategies.
- Trust is a big issue for some communities, e.g. victim's groups.
- Need to balance the need to be tenacious with the need to stop when appropriate.
- Optimism and persistence are hard to maintain during difficult times.
- Passion and action are often intertwined. Initially activists have passion, then service is provided and there is a loss of passion. This decrease in passion leads to stagnation and less activism. Recently this has resulted in lack of trust of the voluntary sector and its ability and desire to make change happen.

Learning outcomes

1. Be aware of your personal values.
2. Be aware of how your personal values impact on the dev of organizational values.
3. Assist VSOs to define their own values.
4. Explore your passion for your cause/VSO (e.g. you may not be passionate about diabetes, but you may enjoy improving health of the community)

5. Understand how passion, rather than statistics/intellect keeps people engaged and take action.
6. Find out and tap into people's ethical passions.

COURAGE

~A leader is courageous, is aware of the elements of courage (honesty, humility, truth, wisdom, love, respect and bravery) and understands how courage impacts on VSOs and local and global communities~

Examples

- Sylvia Tardif, literacy activist from Trois-Rivières, demonstrated her extraordinary determination and courage by penetrating the local world of municipal politics, and getting elected as City Councillor, thereby influencing a conservative City Council to examine issues more broadly.
- At the World Conference against Racism in Durban, Matthew Coon Come spoke about the discrepancy between Canada's worldwide reputation for human rights and its treatment of First Nations people even though this might result in funding cuts. Some say that the government's 65% funding cut to First Nation's groups was a result of this presentation.
- Marilyn Waring became New Zealand's first woman minister at the age of 22. With no understanding of economy, Marilyn asked "naïve questions in order to highlight the absurdities of the way in which wealth was measured in accounting". While our accounting systems consider as wealth everything which generates monetary flows, including road accidents or catastrophes, they do not see wealth creation in women's work within the home or in voluntary activity within VSOs. She discovered that national accounting systems and GNPs worldwide are calculated the same way. She has waged her struggle to change accounting systems internationally, mobilizing women across all continents despite enormous obstacles and challenges.
- Arundhati Roy's extraordinary and courageous work celebrates the human right to freedom of imagination, inquiry, and expression and the right of individuals and communities to define and protect valued and diverse ways of life currently threatened by globalization. Her powerful writing highlights her commitment to social, economic, and environmental justice. She gained attention for her essays

questioning the U.S. government's war on terrorism and its impact on innocent civilians in Afghanistan; she continues to criticize the war in Iraq. Her outspoken viewpoints on India's policies have landed her in court on several occasions. She has been forced to defend her fiction (her first book won the Booker prize) against the charge of “corrupting public morality.”

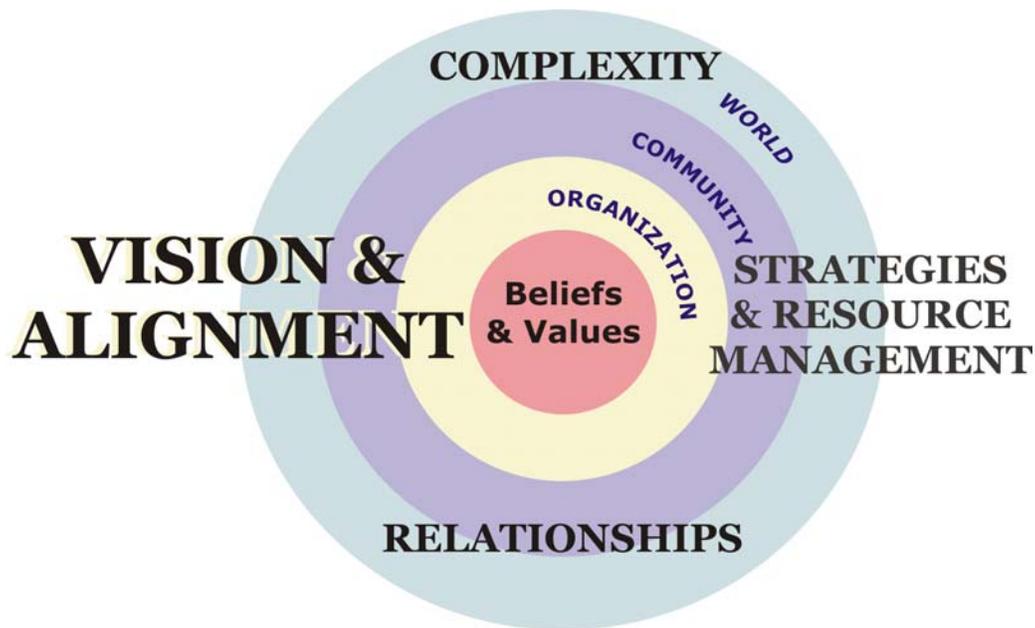
Current challenges & complexities

- Real courage is rare, but is a real indicator of leadership
- Courage often entails individual and organizational risk, e.g. being a ‘whistle blower’
- Courage may require balancing several opposing tensions, e.g. humility/public recognition, passion/ intellect
- To be courageous, leaders must be well-grounded and very well-read.
- Being courageous means not being afraid to be unpopular or make people angry
- Courage often means making choices between several bad options.
- Putting a voice to difficult issues is hard when faced by differences of opinion, or in an unsafe climate.
- It takes courage to overcome oppression, discrimination and abuse.
- It takes courage to stop being an oppressor.
- Courage does not stand alone as a quality, but is interdependent with other qualities: honesty, humility, truth, wisdom, love, and respect.

Learning outcomes

1. Define courage and describe its value.
2. Be aware of your own ability to be courageous.
3. Identify and describe courageous leaders who have inspired you.
4. Review some case studies. Visualize yourself in the shoes of someone needing courage and imagine what you would do.
5. Define how your courage can impact on societal change.
6. Be aware of courage in others.
7. Enable others to be courageous.
8. Explain how not to take advantage of courage.

VISION AND ALIGNMENT



The Vision and Alignment competencies enable leaders to achieve the noblest aspirations of the sector - peace, freedom, human rights, opportunity, culture, safety, justice, and removal of poverty and discrimination -- while exercising leadership in community-based, inclusive and visionary work. Each of these competencies has implications for the way leaders act, whether at the level of personal choices, organizational actions, leadership within the community, or leadership in a more global context. Key competencies in this area include:

- **VISION**
- **ETHICAL/VALUE-ORIENTED DECISIONS**
- **PUBLIC ACTION**
- **PUBLIC POLICY**
- **EXTERNAL RELATIONS**
- **GLOBAL ISSUES**
- **CULTURE OF LEARNING**

VISION

~A leader guides the development of, and commitment to, a vision—an inspiring, achievable view of the future~

Examples

- In the past the vision of the ‘mental handicap’ organizations was to enable individuals to live well in institutions. Then their vision changed and they believed their children should live in the community, work, go to school, get married, etc. A new vision meant these organizations converted to ‘community living’ associations and their mission, strategies, educational programs, lobbying, etc. changed significantly.
- Moving from facility to facility causes stress and re-hospitalization for people with mental illnesses (the usual process requires a person with a mental illness to move from institution, to a high care facility, to medium care, to their own apartment.) By focusing on a new vision, a mental health VSOs changed to a new process: they moved the person from an institution directly to their own apartment with live-in support, then slowly removed the support. With this new vision, people with a mental illness did not have repeated moves, so fewer people were re-hospitalized.
- Canadian Cancer Society’s vision, creating a world where no Canadian fears cancer, steers them in a certain direction. A different vision, e.g. to live in a society where carcinogenic factors have been eliminated would steer them in a different direction.
- The Family Violence Institute changed their mission from ‘to prevent family violence’ to ‘to eliminate family violence’, and as a result their research work changed.
- The Quebec Community Development Corporations umbrella group developed a reference framework for ethical engagement with local and community groups, to help them do the community development.

Current challenges & complexities

- Increasingly, VSOs and funders (and sometimes clients) have different vision(s)
- Board, volunteers and staff are often invested in the status quo.
- VSOs know more clearly what they wish to abolish (e.g. landmines, debt, slavery, cancer) than to build.
- Change (i.e. developing a new vision) may be difficult and uncomfortable.
- The VSOs clients/customers' view of the future is the most important viewpoint, but often they do not have the freedom or ability to 'dream' of a better future.
- A Vision Statement is a living document, constantly growing and changing. Each person brings his or her own perspective to the vision and it grows.
- Change may cost, but no change may cost more.
- Funders often dictate change and future direction. Other funding, e.g. designated bequests, can prevent change too.
- The future for each VSO is often unclear and uncertain and the links between their vision and the actions leading to it are often too obscure. VSOs need to move forward and be quick, flexible and responsive. This is often difficult - moving large bureaucracies (e.g. funders, governments), breaking contracts with staff and/or unions, changing budgets, realigning alliances, moving large collaborations – and sometimes impossible.

Learning outcomes

1. Define vision, mission, goal, strategy, objective, action plan
2. Facilitate a process to define a VSOs or community's shared vision
3. Enable others to contribute to developing and achieving a shared vision and communicate this vision.
4. Analyze how the vision will impact on and relate to the strategic plan, marketing, fund raising, human resources development (job descriptions, performance appraisal), accounting, etc.
5. Define and employ change management techniques.

ETHICAL/VALUE-ORIENTED DECISIONS

~A leader leads the organization and, if appropriate, individuals and community, through a structured decision-making process to resolve ethical and value-oriented issues and dilemmas~

Examples

- In 1992, John Gates, a highly respected Canadian advocate who was dying from AIDS, challenged the AIDS community to refuse to accept vaccines in Canada until they were available, accessible, and affordable world-wide. Today the International AIDS Vaccine Initiative has taken up his challenge.
- The Supreme Court of Canada required that Boy Scouts allow female participation. Despite this, the Girl Guides have refused to allow boys to become Guides.
- The Kidney Foundation does not accept the buying and selling of organs in Third World countries even though the selling of a kidney could improve an Indian family's economic well-being and community stature significantly.
- Many families want 'normalization' for their mentally handicapped family members, yet they support the Special Olympics even though it labels their children as "disabled" and is not a 'normalized' event.
- Food banks question their own legitimacy because they believe that their existence will enable governments to keep welfare rates low. Yet, they continue to provide this service.
- The Canadian Civil Liberties Association chooses to challenge Canada's child-pornography laws.
- Canadian Mental Health Association accepts gaming monies despite being against gaming & gaming addictions.
- Cafedirect is a British company committed to 'fair trade' coffee. Oxfam embarked on a campaign directed at their competitors, accusing them of exploiting growers by paying them a tiny fraction of the retail price of the coffee they sell. Yet, Oxfam owns 25% of Cafedirect.

Current challenges & complexities

- The VS is fundamentally a values based sector with many ethical issues and dilemmas
- Society is changing at a fast pace, many ethical issues appear and many need to be quickly resolved.
- VSOs face decreasing government funding resulting in more ethical decisions. Fewer staff must decide whether to accept or challenge government's decisions.
- VS practices, e.g. fund raising and philanthropy, have their own unique ethical issues.
- Technology causes increased ethical dilemmas, e.g. increased lifespan, successful medical interventions
- Issues like privacy and human rights are abused or ignored while being increasingly important
- Changes to the sector (e.g. more collaboration) result in related ethical issues, e.g. community values must be balanced with individual freedom.
- The balance between the needs of the organization and the needs of the client often cause ethical dilemmas.
- The VS is often seen as society's conscience or the voice of the oppressed, yet often does not have the skills to make difficult ethical decisions on behalf of society and represent the ethical issues well to the public.

Learning outcomes

1. Define values, morals, ethics, critical thinking
2. Recognize ethical issues and demonstrate moral awareness
3. List some VSO-related ethical dilemmas
4. Analyze an ethical dilemma
5. Lead a VSO through critical thinking process to resolve ethical issues and dilemmas
6. Construct a code of ethics or conduct for a VSO

PUBLIC ACTION

**~A leader leads effective and innovative
public action based on sound public policy~**

Examples

- Non-smoker's Rights Organization, Canadian Cancer Society, Lung Association, and Heart and Stroke Foundation lobbied for legislation to prevent workplace smoking & cigarette advertising
- Greenpeace and the Sierra Club blocked clearcut logging in the Great Bear Rainforest
- The Wilderness Tourism Association lobbies for a secure land base and prevents the BC government from allocating most of BC forests for logging use only
- The International Campaign to Ban Landmines lobbied approximately 200 countries to ban landmines
- The Kidney Foundation lobbied the Canadian Council of Grocery Distributors to label ground meat to prevent E-Coli infection and kidney failure.
- The Quebec Advisory Committee for Independent Community Action (23 federations of organizations) developed and adopted a policy for the community action and voluntary sector, and negotiated procedures for implementing this policy, which respects the independence of the individual groups.
- Matthew Coon Come insisted that James Bay Cree be clearly heard in all Constitutional processes, gathered national and international support for their right to choose their own political future. He asserted the Cree of Eeyou Istchee right of self-determination through their own historic Special Referendum.
- Canadian Lobbyist, Nellie McClung, lobbied for women's rights
- Al Etmanski, lobbies for laws, policies and funding for people with disabilities
- Ric Careless, lobbies for wilderness in British Columbia

Current challenges & complexities

- Governments are making massive changes. Lobbying efforts may be enormous in scope, yet must be done. Increasingly VSOs have to develop the solutions as well as lobby for change.
- Lobbying campaigns require excellent interpersonal, writing, oral, and technology skills.
- VSOs may put their government funding at risk when lobbying government
- Lobbying may require massive coalition building, often with competitive or unrelated organizations.
- Lobbying efforts may require fast, innovative movement and extensive knowledge of public affairs and governments e.g. international efforts such as Multilateral Agreement on Investments (MAI) and anti-globalization
- Governments used to balance conflicting opinions then make decisions, now VSOs must do this before lobbying.
- VSOs are under increasing pressure to comply with funder's and government's directions – these may not be responsive to client needs (i.e. the front line issues). Lobbying in these cases is difficult and risky.

Learning outcomes

1. Develop and generate support for a vision that articulates the desired outcome of the lobby
2. Synthesize policy from diverse groups; ensure individuals know, understand, and support policy.
3. Identify and analyze political and decision-making structures: re legislation, policy, budget, services and timing issues in international, federal, provincial, regional and municipal governments, also other decision-making bodies e.g. corporations, unions.
4. Define advocacy, lobbying, social activism and government relations (from VSO perspective)
5. Organize community development and collaborative activities, e.g. coalition building
6. Differentiate lobby-oriented communication and media strategies and relations from normal media activities, e.g. controlling media stories, critical timing issues, confrontational stories
7. Develop a strategic plan for a lobby
8. Appraise alternate actions, e.g. law suits, social activism, etc. and define when they should be used.

PUBLIC POLICY

~A leader engages with development of public policy, creating an atmosphere that fosters the development of innovative solutions to current challenges & complexities~

Examples

- When Sue Rodriguez publicly stated she wanted assistance committing suicide due to ALS, VSOs across Canada had mixed feelings about the implications of supporting this and had to develop policy on this issue.
- When Robert Latimer killed his handicapped daughter due to her acute pain, the disability community was divided – individuals with handicaps felt threatened, some parents could identify. VSOs had to develop policy.
- Red Cross policy – Canadians cannot designate who will receive their blood, even mothers of babies who have to undergo serious heart surgery.
- The Quebec child care policy is the result of 20 years of work by parents organized within the day care centres, together with the union movement.
- Anti-street gang policies: balancing encouragement of good behaviour with punishment for bad behaviour.

Current challenges & complexities

- New problems are emerging rapidly, e.g. Multilateral Agreement on Investments (MAI), globalization
- Policies are often value-based, complex and contentious, e.g. abortion, organ donation, war, welfare and poverty
- Leaders need to balance their personal beliefs with VSOs beliefs, e.g. the right to die (this is contentious in the disability community)
- Ethno-cultural and Canadian values must be balanced in policy, e.g. health-care decision-making and truth telling vary in different ethno-cultural groups.
- VSOs must develop new, innovative policy solutions to complicated and complex problems
- Solutions to complex issues may not yet exist, yet policy is required.

Learning outcomes

1. Identify need for policy development
2. Show systematic, critical and integrative thinking skills
3. Show quantitative analysis skill, including statistical analysis
4. Implement interest-based negotiation skills
5. Plan and implement a policy development process
6. Present a policy analysis
7. Write a policy brief on a current problem.

EXTERNAL RELATIONS

~A leader optimizes external relations, collaborating with and empowering individuals, organizations and communities~

*(*see section on collaboration)*

Examples

- To advocate for the retention of first growth forests in British Columbia, organizations (e.g. Sierra Club, Greenpeace) must understand issues related to the softwood agreement with the United States.
- To work effectively in First Nations, Métis & Inuit communities, VSOs must understand federal laws, Canadian history, aboriginal governance structures, and do background research regarding the specifics of issues as they relate to Aboriginal peoples.
- As a result of on-line information, some health charities are now getting requests for information from other countries, e.g. China, Korea, etc.
- While advocating against fish farms in BC, VSOs must understand global issues re fish, fish farms, and oceans.
- In 2000, the Global Women's March joined women's networks from 132 countries. It all started with the Bread and Roses march by women of Quebec, in 1995.
- Women's organizations must understand global issues when developing programs, e.g. violence and torture in other countries, families and children left behind in other countries.

Current challenges & complexities

- There are many external relationships: media, government (staff/politicians), municipal/provincial/ regional/federal government, funders, United Way, related organizations, competing organizations, individuals, donors and members, people served by VSO
- VSOs legitimacy is generated in part from its relationships with people, e.g. those who experience human rights violation, poverty and extreme suffering, and with

people who are in a position to do something about it (politicians, military leaders, corporations).

- Government relations are tricky as VSOs are often dependent on them for funding, but must lobby them or confront them about their decisions or policies
- Many external organizations may compete with VSOs.
- External relations are often forced onto VSOs by funders.
- Media relations are critical as they can easily cause harm to VSOs cause. The media is undergoing significant and rapid change.
- VSOs need to research external issues and organizations completely; this is often difficult as information may be controlled by large governments and their interests. Research may take time, money, & capacity.
- Collaboration is complicated, costly and time-intensive. Often competing organizations or organizations with different mandates must collaborate, which is difficult.

Learning outcomes

1. Identify external groups that are relevant to a VSO that you know. Develop a comprehensive understanding of each external organization.
2. See connections, identify patterns in the relationships between the VSO and these external groups
3. Synthesize shared interests and issues
4. Identify ways to support each other, e.g. mentorship, joint learning, shared programs and/or policy development, lobbying
5. Establish communities of practice and/or learning.
6. List shared accountabilities
7. Collaborate effectively (for more information see the subsection in the Table of Contents entitled “**Collaboration**” under the section entitled “**Relationships**”)

GLOBAL ISSUES

*~A leader leads action on global issues personally,
organizationally and within community~*

Examples

- International Campaign to Ban Landmines
- Tatshenshini campaign to save BC river from mining became successful when they involved the US and Alberta governments
- International Campaign to Ban Child Soldiers
- Multilateral Agreement on Investments
- Anti-globalization and Second Superpower movements
- Jewish VSOs' work is impacted by Israel's activities and vice versa
- Women for Women Afghan (W4WAfghan) is a volunteer solidarity group committed to raising awareness to the plight of women in Afghanistan.
- One Sky in Northern BC campaigns to end trade of conflict diamonds in Sierra Leone, advocates for multi-country policies to prevent diamond mining abuse, advises Canadians about 'blood diamonds' and their purchase
- Loss of rain forest impacts on local environments, loss of medicines
- Impact of current war on Canadian children
- The Canadian Lung Association's response to new illness: SARS
- The Quebec Solidarity Group has united social economy organizations, social movements, university researchers and international NGOs around the promotion of the social economy.

Current challenges & complexities

- Our world is now much smaller; boundaries have diminished. Leaders must have a much greater understanding of global issues.
- Global issues, e.g. oppression, poverty, human rights abuses, also occur at home.
- Society expects VSOs to have increased respect for, and impact on, global issues, e.g. environment, recycling, overseas development, etc.

- Global relationships must be formed with a vast and complex variety of governmental bodies, corporations, unions, and individuals. For example, in the absence of responsive governments and due to the increasing power of trans-national corporations, social justice and environmental VSOs (e.g. Oxfam, Greenpeace) are shifting their attention directly onto companies (e.g. McSpotlight campaign, Shell boycott)
- World issues have greater impact on local activities, due to increased knowledge, heightened media and Internet coverage, e.g. the war on Iraq.
- VSOs must stand up to very powerful governments and often put their VSOs at risk, e.g. Oxfam's stance about refusing to provide humanitarian aid if the US government is involved in rebuilding Iraq.
- It is increasingly difficult to get accurate, credible information about global issues.

Learning outcomes

1. Describe important global issues
2. Analyze connections and opportunities between local and global issues
3. Give examples and analyze global action by VSOs
4. Identify and clarify ethical dilemmas and complexities internationally that underlie global crises.
5. Relate how international, national, and local issues impact on VSO and local community
6. Relate how VSOs work affects local, national and international issues
7. Understand the functioning of the United Nations
8. Know international documents and mechanisms, and how they relate to the mission of your organization, as well as how to activate them if necessary

CULTURE OF LEARNING

~A leader sustains a culture of learning within their own organization where innovative ideas are nurtured and valued~

Examples

- The Popular Education Centre (QC) has worked since 1972 to respond to the training needs of community-based organizations.
- Human resource directors from health agencies in Vancouver agree to meet once a month to share human resource policies and practices
- Fund raisers form their own professional organization
- Five health agencies agree to consolidate their training budgets and hire trainers together
- Small agency asks large agency to provide a mentor for their Executive Director
- Door-to-door campaign directors meet monthly to learn from each other.
- Board, volunteers, staff and clients invite doctor to present latest medical advice for patients
- Board has retreat to learn more about their role and responsibilities

Current challenges & complexities

- Continuous change, creativity, innovation, courage and passion require a sound knowledge base, well-read individuals and continuous learning.
- Leaders need to have humility, understand they don't know everything and be aware that they can learn from others.
- Career development is important for staff retention. Volunteers and board members want learning opportunities too.
- Staff retention requires that staff are trained for their job and are developing further skills outside their job
- VSOs have decreased funds for staff development and training.
- Overworked staff members have no time for professional development courses.
- Donors, funders, government, and the public believe funds should be spent on programs, not training

- Courses or other learning opportunities are not always relevant, accessible, recognized, transferable, or inclusive. Courses and training are not available for some topics.
- Some competencies need different approaches, e.g. developing courage, enabling courageous conversations about the voluntary sector, passion and compassion.
- Colleges, universities and other training organizations need to modify their curriculum and pedagogy and create new learning opportunities. Learning needs to be more accessible.
- The development of online communities of learning and practice is a challenge.

Learning outcomes

1. Define principles of adult learning
2. List and compare types of learning styles and training theories
3. Develop individual development plans for staff, volunteers, and board
4. Write organizational policy re continuous learning
5. Discuss board role re staff development
6. Employ on-the-job learning: committee work, report sharing, field trips, job aids, job-expanding, job-rotation, job-shadowing, learning alerts, orientation, peer-assisted learning, stretch assignments, special projects
7. Develop learning relationships: coaching, mentoring, networking, performance appraisal.
8. Demonstrate facilitation skills, e.g. appreciative inquiry, asset-based visioning, search conferences, open space technology.
9. Research and refer to college and university courses, seminars, workshops, conferences, forums, and professional associations.
10. Discuss ways that several VSOs can collaborate re learning, e.g. communities of learning/practice, discussion groups, reading clubs, sharing of training costs, mentorship, etc.
11. Model one's own values about learning for others.

STRATEGIES AND RESOURCE MANAGEMENT



The Strategies and Resource Management competencies relate to maximizing day-to-day operations through sound and ethical management practices. The competencies selected here were the most important of all those identified by voluntary sector leaders during the research process. Each of these competencies has implications for the way leaders act, whether at the level of personal choices, organizational actions, accountability to the community, or to the world outside the community. Key competencies in this area include:

- **FUND RAISING**
- **FINANCIAL STEWARDSHIP**
- **MARKETING AND PUBLIC RELATIONS**
- **INFORMATION AND COMMUNICATION TECHNOLOGY**
- **RESEARCH**
- **PLANNING AND EVALUATION**

FUND RAISING

~A leader optimizes diverse, effective and ethical fund raising approaches, enhancing the vision of the organization while being responsive to, and respectful of, donors' and grantors' wishes~

Examples

- Win Without War raised \$400,000 on-line in 48 hours with average donation of \$35.
- Cause-related fund raising (i.e. a small percentage of the sales of every bottle of shampoo is donated) raises \$5,000 for breast cancer research.
- Value Village (large for-profit company) hires phoners to ask for clothing & used goods for 'the mentally handicapped'. The company (a US religious organization) buys old stores, converts them into Value Village stores, waits to make real estate profit, meanwhile gets tax breaks for their charitable donations. A small percentage of the sale of items at Value Village is donated to charities; a VSO receives \$275,000/yr.
- When it was legal, the Canadian National Ski Team generated controversy by accepting funds from cigarette companies. They later changed their minds.
- A few years ago, Child Find hired a telemarketing firm that promised to raise \$25,000 if given 6 months to call on their behalf. The telemarketing firm raised \$25,000 for Child Find and \$600,000 for itself.
- To raise money, the Nature Conservancy in Texas drilled for natural gas under the last breeding ground of an endangered bird species and sold the gas (that did not belong to them). Result: loss of birds & \$10 million US in a lawsuit.

Current challenges & complexities

- Government funding is being cut back to individuals (e.g. welfare cuts) and VSOs.
- Foundations, United Way and others are setting the social agenda while being removed from 'front lines'.
- VSOs may need to refuse certain money. They must fund raise for their vision rather than 'chase money'

- Funders fund programs, not VSOs; because of this VSOs/programs may not be sustainable
- VSOs find it difficult to challenge their funder's funding policies or practices.
- Funders are beginning to expect VSOs to develop for-profit businesses
- Funders want to fund big dreams not small organizations, e.g. save the boreal forests world-wide
- Fund raising collaboration is extremely complicated and, on occasion, VSOs often must collaborate with organizations that they usually compete with for funding
- Younger donors are fickle, not loyal, are looking for solutions and do not fund long term services
- Wealthy older donors want more power when donating
- Ethical issues related to fund raising are complicated
- Fund raising in various ethno-cultural communities is complicated
- Financial corporations, e.g. trust companies, are competing with VSOs for donors/clients
- VSOs need to have long relationships with their donors

Learning outcomes (many colleges offer Fund Raising courses and programs)

1. Develop a fund raising case statement and policies that relate to vision and mission
2. Run fund raising campaigns and events, e.g. annual fund, major gifts, capital campaign, planned giving, special events and prepare grant applications and find matching grants
3. Optimize marketing for fund raising: demographics/generational patterns, major donor relationships
4. Define, plan and analyze direct mail, telemarketing and personal solicitation campaigns
5. Direct planning and research, e.g. strategic planning, prospect research
6. Direct and integrate financial management related to fund raising record keeping, budgeting, fund raising software/info systems, financial statement development and analysis
7. Define when a VSO is allowed to develop for-profit businesses, develop a plan to initiate one.
8. Be aware of and resolve fund raising issues related to ethics and accountability

FINANCIAL STEWARDSHIP

~A leader optimizes financial stewardship, ensuring the effective use of funds to achieve mission, inclusive and effective decision-making, and accountability to multiple stakeholders~

Examples

- A VSO invested much of their surplus money in real estate. When they lost money, the public questioned how much risk VSOs should be allowed to incur with their investments.
- Revenue Canada recently audited many VSOs re their use of independent contractors. They raised issues related to tax, CPP, and EI payments.
- Public concern continues re expensing indirect costs to programs e.g. rent, ED salary, FR costs, etc.
- The 2002 accounting scandal at Washington, DC United Way cost the United Way system \$30 million in the US.
- A BC Archdiocese (a VSO) lost millions of dollars on horse racing. There were public questions related to policies and controls related to investments.

Current challenges & complexities

- There is a lack of expertise re financial record-keeping in VSO staff and boards. VSOs have unique financial record-keeping needs e.g. tax receipts, reporting, direct/indirect expenses
- VSOs are 'financially accountable' to a variety of stakeholders
- The public continues to believe that there are few legitimate overhead expenses in staffing, coordinating, monitoring, accounting, fund raising and disbursing monies. After the September 11th attacks, many VSOs, who were involved directly in the relief efforts, were faced with enormous pressure from the public and media and felt obliged to contribute every dollar to victims of the attacks. This will exacerbate the public's belief that VSOs should keep administration costs "under 10%".

- The public has an increasing desire to donate to designated funds. VSOs need to balance donor's wishes with VSO needs.
- Special financial expertise is required re major and planned gifts
- There is a lack of clarity about how to account for direct and indirect costs
- Government funded services are often not fully-funded. Many VSOs allocate donations, investment income, gaming funds, etc. to underwrite poorly funded public services.
- Funders (foundations, governments, gaming, United Way) do not like risk, VSOs must diversify funding
- Funders are setting the agenda, rather than listening to the front-line, on-the-street VSOs.
- Anti-terrorism legislation requires complicated decisions re receiving or disbursing funds (e.g. Oxfam, Greenpeace)

Learning outcomes

1. Implement financial record-keeping and decision-making functions: budget, financial statement analysis, loans, leases, audits, cash flow, petty cash management, direct/indirect expense accounting
2. Develop financial policies and control systems
3. Define legalities and statutory framework re finance, e.g. conflict of interest, investments, etc.
4. Analyze financial systems and legalities unique to VS, e.g. donations, sponsorships, gifts-in-kind, tax receipts, investments
5. Define and optimize interrelationship between financial record-keeping and analysis, and vision/mission, planning, fund raising and human resources
6. Lead inclusive decision-making related to finance
7. Demonstrate monitoring/control systems, manage financial accountability with many stakeholders

MARKETING AND PUBLIC RELATIONS

~A leader leads a variety of marketing and public relations processes, including social marketing, enhancing the organization's ability to communicate the vision inspire others to share the vision~

Examples

- Sudden Infant Death Campaign persuaded parents to put their babies to sleep on backs.
- For teens, the coolness of smoking is a higher priority than health. So the truth.com focused on teens as victims of manipulation by the older generation, and collusion by tobacco and advertising companies' to take teens' money and abuse their bodies for billions of dollars in profit. It was an effective campaign: Teens now reject cigarettes as a hip way to strike back.
- Baby seals bludgeoned to death, tiny zodiacs rammed by huge warships, international boycotts of BC timber sales. Greenpeace is a 'brand' that causes concern when they take action.
- A photographer has been taking photographs of drug-users/sex trade workers in Vancouver's downtown eastside: 'Heroiners'. His project has humanized and put a 'face' to a long-overlooked group of women.
- Alzheimer Association is working with Gordie Howe whose wife suffers from a non-Alzheimer related dementia. It could benefit the VSO (high profile spokesperson) or confuse (she does not have Alzheimer.)
- Anne Nickerson Jackie wanted to educate the public about E-Coli and resulting kidney failure after her daughter had this illness from eating undercooked hamburger. The media wanted to show her daughter. Nickerson Jackie chose to protect her daughter from the media until she could decide for herself whether to be public about her illness and life.

Current challenges & complexities

- Most VSOs do not have dedicated staff /budget for marketing/public relations
- Funders and governments do not like to fund marketing and public relations

- Marketing during change or collaboration requires skills, flexibility and savvy
- Leaders need to understand the impact the media can have on personal lives, e.g. on abused women who want to speak out, young Native people who expect that by speaking out they will improve situations/lives.
- Media is changing rapidly (e.g. alternative media) & often seen to be biased and unbelievable.
- Traditional journalism is being challenged by the alternate press, open source publishing, open journalism. Governments/corporations are controlling media in subtle ways, e.g. embedded vs. non-aligned journalists
- Media systems (how people get their 'news') are changing rapidly, e.g. web logging (diaries), list serves.
- A gap is growing between traditional marketing (marketing must be managed, controlled & directed) & more recent thinking (markets are conversations; respect, dialogue and co-create value with the customer)

Learning outcomes

1. Define how marketing and PR relates to vision/mission, planning, fund raising, human resources, budget, political action, etc.
2. Define marketing, advertising, promotion, public relations, publicity, sales
3. Define market segmentation, target marketing, positioning strategy, market niche, and image
4. Compare and contrast print, radio, television, video, e-mail, web, etc. and determine which medium is the most effective for different audiences and issues.
5. Plan and implement a marketing and/or communications audit
6. Undertake market research
7. Develop a 'communications toolbox': e.g. media release, newsletter, brochures, advertising, etc
8. Develop a marketing and/or communications plan
9. Develop effective relations with media
10. Define and analyze future communication technologies, e.g. enhanced cell phones, video-streaming, on-line processes, knowledge management systems, etc. and determine what is the most useful application of these for VSOs.
11. Develop marketing policies for a VSO

INFORMATION AND COMMUNICATION TECHNOLOGY

~A leader optimizes information and communication technology opportunities and solutions, specific to organization's needs~

Examples

- Jody Williams of the International Campaign to Ban Landmines says that success was due to cell phones & e-mails.
- The emerging “Second Superpower” is a new international player, constituted by “will of the people” in a global social movement, i.e. millions of people concerned with social development, environmentalism, health, & human rights. They use collective power: web-based action, pirate radio broadcasts streamed live onto the Web and rebroadcast worldwide, uploaded live video of events, e.g. marches, digital images sent to Web, texting/communicating on cell phones to track one another's whereabouts, web logging/metablogging (diaries), instant messaging, wikis (web sites that can be changed by anyone), email and ability to punch in postal code on-line to find location, e.g. of nearest candle-light vigil. This social movement is capable of rapid community consciousness and action. For example, Moveon.org (specializes in rapid response political action campaigns) has 2 million+ on their email list, in 2003 raised \$700,000+ in 2 days, got 350,000 to peace rally in NY, and raises money for peace ads. Now they are building a worldwide network of media activists who identify media bias and confront local broadcasters.
- Ontario agencies that provide Information Services are collaborating to develop a 2-1-1 phone service.
- The Quebec local development calendar, put on-line by the organization called “Carrefour du développement local,” shares notices of upcoming events and useful documents concerning local development.
- A VSO invests in IT, improves services, extends reach and develops new products. Other VSOs are pressured to ‘keep up’. At this point, expenditures become a necessary expense needed to avoid disadvantage rather than a discretionary expenditure made to gain advantage.

- Charity.ca may increase efficiency but decrease connection to, and information collection about, donors

Current challenges & complexities

- IT is changing rapidly and extensively. Donors expect efficiency yet won't fund it.
- A large percentage of VSOs do not have computers or basic, up-to-date software
- VSOs often have no funds to purchase equipment or software. They rely on a mishmash of incompatible, out-of-date donated computer equipment and software.
- The voluntary sector needs specific, expensive IT products, e.g. fund raising software
- VSOs are small, workloads are large, there is no funding or time for IT training
- There are gender, age and poverty issues related to access (e.g. may cause exclusion of poor people/seniors). What does IT do to oral culture?
- VS must keep up with social activists' abilities (see Second Superpower above)
- VS unique IT needs are often unresearched, e.g. on-line fund raising – major financial implications
- Information technology provides facts but not wisdom. VSOs must resolve ethical and values issues related to communicating via IT rather than in person.
- IT may increase efficiency resulting in increased competition amongst VSOs
- IT may cause 'swarming' – participants take the same action, resulting in increased advantage.

Learning outcomes

1. Define IT tools, options and issues, including future options. Contrast knowledge and information.
2. Analyze the ethical issues related to using IT
3. Define IT policies and legal issues
4. Implement on-line usage: e-mail, search/browse, Internet, on-line writing styles, etc.
5. Compare and contrast the value of various IT options, e.g. e-mail strategy vs. web site development
6. Develop a plan for IT including organizational assessment, training, budgeting, etc.

7. Define and analyze unique VS IT needs: fund raising, social action, collaboration, etc.
8. Analyze future IT potential e.g. enhanced cell phones, video-streaming, 'smart mob' techniques etc.
9. Define the challenges and pitfalls of IT such as infoglut, technology in command, saturated users.

RESEARCH

~A leader optimizes research and its application~

Examples

- Ontario professionals did research. Results: people with mental illness need: housing, employment training programs, life skills training programs. BC people with a mental illness did research themselves, reported: they wanted a home, job, friends, right to fall in love/get married/have a baby & acute need for money.
- Previously, in drug research, patients got either drugs or a placebo (placebo patients often died). AIDS groups organized meetings, mixed all drugs in a bag and re-distributed pills so everyone got some drugs. Progress of illness slowed down, proved the drug (AZT) worked, even at lower doses than was being tested; research changed.
- Kidney Foundation's focus group research on beliefs/values re organ donation identified First Nations concerns: lack of trust of research & researchers, confusion between focus groups & healing circles.
- Focus of medical research used to be decided by researchers until AIDS groups rebelled. Now AIDS/breast cancer patients have a strong voice in research priorities and focus.
- Research in Chinese Canadian groups requires special care—Chinese people generally answer how they believe the researcher wants them to answer. Other ethno-cultural groups react in different ways.
- AIDS organizations now publish location and details of clinical trials so patients can decide whether to participate in clinical trials. This used to be under the control of the medical and research professions.
- Experimental drug use on humans was banned in Canada until AIDS groups fought for right for patients to try them, as they would die without these drugs. These 'catastrophic rights' now make experimental drug testing available to people in Canada who would die without them.

- The Quebec Alliance of Universities and Communities Researching the Economy acts on 5 major fields of study through a partnership between 7 universities, 5 sectoral committees, and many community-based organizations. All results are published on a variety of websites.

Current challenges & complexities

- Research is often unfunded in the voluntary sector.
- Research in the VS is rare; research about the VS is even rarer.
- The VS has unique research needs, e.g. on-line fund raising, venture philanthropy, volunteerism
- Qualified researchers are not usually hired in the VS, and staff have few research skills
- VS research is not published; there are very few journals resulting in little sharing of research results.
- There are ethical issues related to client and social research.
- There are important ethno-cultural issues related to research that are not well understood or researched.
- There are ethical issues related to forming research questions.
- There are ethical issues related to deciding how research is formulated or will be used, e.g. research may be used to legitimize or de-legitimize certain types of knowledge.
- There is a need for research to ensure that advocacy and action is evidence-based, and concrete policy alternatives are developed, considered and prioritized in order to influence appropriate change.
- Quantitative and qualitative research needs to be done to highlight the positive results of one's action and the lessons learned.

Learning outcomes

1. Demonstrate an understanding of the research process: ethical principles, data gathering, analysis, and synthesis, use of statistics, evaluation principles
2. Compare and contrast different research methods
3. Demonstrate participatory action research
4. Research, write up and present an inspirational story.
5. Develop an inclusive research culture
6. Organize, analyze and interpret quantitative & qualitative data to assess trends, anomalies & relationships
7. Apply research findings to determine appropriate action(s)
8. Define how research relates to vision/ mission, program planning, fund raising, financial management
9. Develop policies related to research for a VSO.

PLANNING AND EVALUATION

~A leader leads responsive and inclusive planning and evaluation processes to achieve mission~

Examples

- British Overseas Aid Group (5 biggest int'l NGOs) explored quality standards in development work and cautioned against developing standards & bureaucracy. They recommend commitment to continuous improvement. "Western development discourse still talks of a relationship of solidarity, accompaniment & partnership between NGOs & poor people. Overly business-like application of quality & standards could distort such relationships forever."
- Carnegie Centre & Van Area Network of Drug Users through a community evaluation process found that drug users wanted to 'make a contribution'. They developed a program where drug addicts were trained to work with other drug addicts, giving them a sense of value and self-worth. For many this helped them kick the habit.
- The COMSEP (Mauricie region of Quebec) developed an original method of evaluating its activities to demonstrate to the government its effectiveness. This method has been shared within the sector, both domestically and internationally, and recognized for its effectiveness internationally.

Current challenges & complexities

- VSOs have little time, money or expertise for planning or evaluation.
- Evaluation has traditionally been used to prove, rather than improve, programs.
- Multi-perspective/multi-stakeholder collaborations are difficult to evaluate and therefore often unfundable
- There is a need to identify outcomes that will result in long-term specific actions especially those that affect anxiety, power, difference, and connectivity.
- There is a need to balance traditional planning models with complex adaptive systems model planning. VSOs must balance data/planning/safety with intuition/action/risk/politics/values. They must balance management processes

that are rational/planned/standardized/repeatable/controlled/measured with processes that explore new possibilities through experimentation/trials/autonomy/ freedom/intuition/ working at the edge of knowledge/experience.³

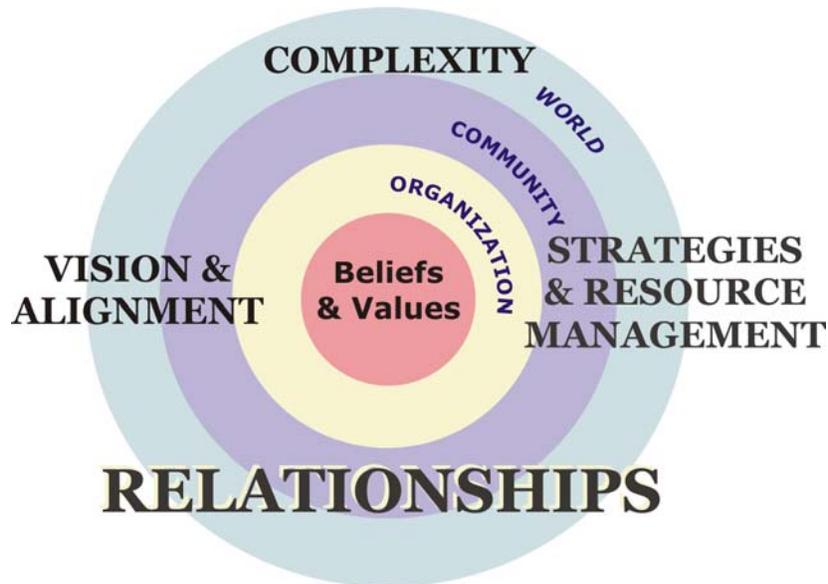
- It is hard to track the effects of VSO actions in the context of personal, social, economic, environmental, and political change.
- Feminist and ethno-cultural researchers and evaluators advocate for changes to research and evaluation because historically, experiences of girls/women/ethno-cultural groups have been ignored and do not fit with data on white, middle-class males; traditional methodologies can be seriously flawed, e.g. superiority of objective vs. subjective knowing, distancing of the researcher/evaluator from participants, and assumptions of value-free, unbiased research/evaluations

Learning outcomes

1. Compare and contrast research tools: feasibility studies, surveys, operation reviews, etc.
2. Identify strategies for involvement and inclusion in planning and evaluation processes
3. Develop traditional strategic plan: objectives, strategies, action plans, timing, responsibilities
4. Describe a complex adaptive systems model of planning
5. Compare and contrast traditional and complex adaptive systems models of planning
6. Implement a community needs assessment, community inventory
7. Identify how planning impacts on governance, finance, fund raising, HR, volunteer program, etc.
8. Identify VS-specific planning/evaluation processes: special events, social action, program planning, overseas development, inequality, empowerment, client involvement, social & ethical audits
9. Explore issues such as the relationship between evaluation, funding and accountability; evaluating multi-perspective, multi-stakeholder community collaborations. Identify how these can lead to better policy and more effective action.

³ Edgeware (www.edgeware.com)

RELATIONSHIPS



Leadership in the voluntary sector means working with people to get things done. The voluntary sector is characterized as a sector that cares about people. The relationship competencies identify the skills necessary to work effectively with people inside and outside the organization to achieve mission, and to enable the best of what is possible through human interaction. The most important competencies in this area include:

- ***INTERPERSONAL RELATIONSHIPS***
- ***COMMUNICATION***
- ***POLITICAL ACUMEN/SAVVY***
- ***PUBLIC PERSONA***
- ***HUMAN RESOURCES***
- ***TEAM DEVELOPMENT***
- ***HEALTHY WORKPLACE ENVIRONMENT***
- ***COLLABORATION***

INTERPERSONAL RELATIONSHIPS

~A leader optimizes interpersonal relationships, effectively managing relationship dynamics~

Examples

- Two individuals with disabilities ran across Canada. Terry Fox handled interpersonal relationships well, while Steve Fonyo struggled with his confidence, drinking, and interpersonal skills
- A VSO provided information on health issues to Chinese Canadians and required an English speaking family member to translate the information for their non-English speaking relative. The family member translated the information into a culturally appropriate format, i.e. did not translate the part about dying and death
- Board member writes a love letter to an Executive Director. When told that the love was not reciprocated, the board member began to criticize the Executive Director at board meetings.

Current challenges & complexities

- Relationships are far more complex than in the past:
 - Managers used to direct their staff; now they must motivate and inspire staff
 - Managers used to focus their relationships within their VSO; now relationships are internal, external, and with local and global communities.
 - Individual interpersonal relationships, team relationships and collaborative relationships all require different interpersonal skills.
 - Busy travel schedules and managing staff from a distance are challenges to providing mentoring and support.
 - Relationships in a horizontal organization are more complex than in a hierarchy.
 - Inclusion and diversity require greater interpersonal and cross-cultural skills.

- **Ethno-cultural interpersonal relationships require knowledge, sensitivity and expertise.**

Learning outcomes

1. Develop self-understanding re interpersonal relationships using tools such as Myers-Briggs, Learning-style inventory, emotional intelligence testing, etc.
2. Define theories of communication and interpersonal styles
3. Define personality, attitudes, perception, motivation
4. Build good relationships and improve poor working relationships
5. Influence people, negotiate effectively, criticize constructively
6. Value and manage diversity and inclusion
7. Challenge existing processes and patterns of behaviour
8. Mentor and coach others
9. Implement change, conflict and crisis management
10. Demonstrate political acumen/savvy
11. Define legal issues re interpersonal relationships: harassment, hiring, firing, conflict of interest, slander and libel, etc.

COMMUNICATION

~A leader excels at appropriate and effective communication, both oral and written, among people with diverse personal, social and cultural backgrounds~

Examples

Good communication

- Canadian Diabetes Association works with native elders on diabetes prevention information.
- AIDS organization produces sexually explicit posters about condom use for gay men.
- Chinese Renal Association develops culturally appropriate fund raising strategies for Chinese Canadians, e.g. dinners/galas with door prizes, raffles and casinos that focus on 'good luck'.
- Transplant Society avoids talking about death or organ donation during Chinese New Year, which is culturally inappropriate.
- Canadian Cancer Society fund raises and distributes information about cancer to the Indo Canadian community at their gudwaras

Poor communication

- A health-related VSO made the mistake of translating Canadian dietary information into Chinese rather than develop information based on Chinese diets.
- VSO produces posters in the wrong language (e.g. English for a Vietnamese audience) or suggesting culturally inappropriate solutions

Current challenges & complexities

- Communication styles are rapidly changing (e.g. short, quick on-line writing styles)
- Communication technologies are rapidly changing (e.g. e-mail communication, web logging, etc.)
- Culturally appropriate communications requires expertise

- Leaders need to be aware of global issues and understand political, cultural, social, environmental and language issues
- VSOs have dilemmas about whether to produce information that is suitable for everyone, or suitable for specific groups.
- VSOs seek a 'common language' when working with groups. This requires respect, reciprocity and research (prior to approaching or relating to different cultures). Language issues may never be resolved.
- Oral cultures had to know what was crucial and they had to pass down ALL the critical pieces of information; this contrasts with current information which is almost unlimited and requires a great deal of discernment.

Learning outcomes

1. Develop effective communication skills: listening, speaking, reading, writing, presentation, IT, interview, facilitation, on-line, web-based.
2. Communicate in a logical, persuasive and constructive manner
3. Use communication technology effectively and efficiently
4. Consult with and share information with peers in a variety of settings with appropriate style flexibility
5. Encourage communication from individuals with a variety of abilities and styles and with various personal, cultural, and social backgrounds
6. Develop culturally appropriate fund raising and public education strategies
7. Create learning environments for others
8. Compare & contrast creative communication approaches: discussion, dialogue, and decision-making
9. Manage and teach others to manage conflict

POLITICAL ACUMEN/SAVVY

~A leader demonstrates political acumen, maintaining effective relationships among individuals within VSOs & with individuals in external organizations and communities~

Examples

- The International Campaign to Ban Landmines worked with groups around the world who were working with their own governments. Their finest result was when they worked with the government of Canada empowering them to work with other governments to get multi-government agreement –the Ottawa Treaty.
- Matthew Coon Come fought against the massive, \$13 billion James Bay hydroelectric project, which threatened to flood much of the Cree land in N. Quebec. Gifted with savvy for politics & publicity, he organized a canoe trip of James Bay Cree elders, through Lake Erie, down Hudson River to NY City. He made a plea for Quebec Cree in a colourful and effective way — directly to the customers of Hydro Quebec —Manhattanites, the media capital of the world. He knew Quebec leaders were ultra-sensitive to world and US opinion. His campaign resulted in the Cree's right to renegotiate with Quebec the terms by which the hydroelectric project could be developed.

Examples of lack of savvy

- VSO policy states that donors cannot designate what program or who will receive their financial donation. During 9-11, billions of dollars were donated to families of 9-11 victims but all the funds were not needed for this emergency. VSO tried to maintain its policy and designate surplus funds in case of future terrorist actions. There was significant public outcry and threats of legal action by government.
- As a gesture of humanitarian support during the war in Afghanistan, US government airdropped 500,000 packets of emergency rations (a single meal for 500,000 people out of the several million in dire need of food). VSOs condemned it as a cynical and dangerous PR exercise, worse than futile. Food would not get to people who really needed it and those who ran to retrieve the

packets could be hurt by landmines. VSOs condemned the US government's failure to understand what years of relentless hunger and poverty meant.

Current challenges & complexities

- Many VSOs do not see themselves as political, yet change and social action requires political acumen/savvy.
- Political acumen requires courage, wisdom, respect, knowledge
- Difficult decisions may be needed, e.g. when to be 'straight-shooter' vs. maintain privacy
- Political acumen is required not only to maintain effective relationships externally, but also to mobilize energy, support, and action in different circles through differing means at the appropriate times.
- A leader needs to understand what is essential or the minimum required to move forward. They create space and boundaries for people to connect, experiment, and to innovate.
- Difficult skills may be required e.g. how to reach consensus or consent, how to work through conflict and chaos, how to respond to or approach controversy.
- There may be unwanted results, e.g. legal issues, loss of funding.
- Personal and organizational risk may be involved.

Learning outcomes

1. Compare & contrast different interpersonal communication and decision-making processes and styles
2. Give examples of and discuss: social responsibility, sustainability and self-sufficiency, building capacity, individual ethical and principled behaviour, inclusion and diversity, sensitivity, empathy, compassion, optimism, persistence, passion, and courage
3. Understand group dynamics, systems thinking, and complexity science.
4. Describe networking and collaboration skills
5. Analyze change, conflict and crisis management skills and processes
6. Be aware of the tensions between cooperation/collaboration and competition/confrontation
7. Discuss and evaluate personal and VSO-related risks
8. Be aware of legal and policy issues

PUBLIC PERSONA

~A leader successfully represents, as a public persona, the interests, ideas and views of clients, members, and board members to stakeholders, the public, etc., while being mindful of apparent diversities and complexities~

Examples

- A volunteer at a rehabilitation centre was feeding a profoundly disabled person lunch. The person accidentally choked to death. Media came calling...
- After community consultation, the local mental institution was scheduled to close down, replaced by community facilities. Unions (concerned about their jobs) told media that 'crazy, violent' people were 'being dumped on the street.' Media calls Executive Director of the Canadian Mental Health Association.
- Boatloads of Chinese people arrive on the shores of British Columbia. Media wants interview with Executive Director of local refugee organization.
- Child is accidentally locked in, alone, after a parent-operated pre-school is closed for the day. President of the board is interviewed by the media...
- After the blood scandal, the blood agency developed a new policy: people who had visited England in past 6 months could not donate blood (due to Mad Cow Disease). The media requested an interview. The Executive Director resigned rather than promote this policy because she believed that risk of infection was small and the potential loss of blood donors was enormous. Her resignation was triggered by being a public persona.

Canadian public personas

George Erasmus, Chief Commissioner, Royal Commission on Aboriginal Peoples

David Suzuki, David Suzuki Foundation, environment

Mario Bernardi, CBC Radio Orchestra, National Arts Centre Orchestra, music

Terry Fox, Steve Fonyo, Cancer

Rick Hansen, Spinal Cord Research

Current challenges & complexities

- Leader must decide whether to be a public persona, to enable another to be the public persona, or to have multiple public personae, e.g. board member, staff, director of communications, researcher, client/consumer/customer
- The public and politicians are most influenced by clients telling their own story, but clients may not be the best presenters.
- There are ethical issues related to becoming a public spokesperson, e.g. should an abused woman be asked to represent the views of a victim's support service? Should a First Nations person be encouraged to try to make changes through the media, when very little will happen as result of his efforts? When is this appropriate?
- Being public entails risk and possibly unwanted results.

Learning outcomes

1. Develop, synthesize and analyze policies and issues for public presentation on behalf of the VSO
2. Develop a public position statement for a VSO
3. Be comfortable with public speaking and being interviewed (print, TV, radio and IT)
4. Develop styles that are suitable for different audiences e.g. telling stories with simplicity, so that new audiences can relate
5. Identify and train spokespeople, including a client
6. Analyze ethical and legal issues related to public presentation
7. Lead response to a lobby, a community-based collaboration, and an organizational crisis (internally and publicly).

HUMAN RESOURCES

~A leader optimizes human resources (staff, volunteers and board members), providing a collaborative and supportive environment in which to make decisions~

Examples

- BC Association for Community Living trains, informs, supports and provides mentors to self-advocates (people with a mental handicap) so that they can participate fully as active board members.
- Canadian Youth Business Foundation is a youth employment program that offers post-secondary graduates the opportunity to gain valuable work experience in an international development setting. They also have 2 mentoring programs: Entre Nous (a face-to-face program) and Odyssey (an online program).
- Confusion re staff & volunteer: A recently hired Executive Director encounters a 'volunteer receptionist' who has worked at the VSO for the past 7 years 5 days/per week, 4 hours per day. She has a head injury and is on a disability pension so should not be 'working.' She is abused by her husband when she stays home. She is paid \$100/month and needs to ask permission to 'take a vacation.' Staff members say she is a volunteer; the Executive Director believes that she should be a staff member.

Current challenges & complexities

- The workforce of a VSO is more complex than other sectors—it includes board, staff and volunteers.
- VSOs are no longer accountable just to clients, they have multiple accountabilities: clients, public, board, donors/funders, government(s), etc. Staff members have multiple accountabilities that are hard to manage.
- Managers used to direct, now they must include, support, motivate and inspire staff.
- Staff are underpaid and overworked compared to other sectors, often in positions that are stressful

- VSOs need to be big enough to hire the diverse expertise required. VSOs are building alliances to share management resources, e.g. Director of Human Resources.
- Different generations want different things from a job or volunteer role resulting in a much more transient and demanding work force, which is more difficult to manage.
- Decision-making within a VSO is no longer clear. Board and staff roles are often unclear: Some boards are involved in day-to-day operations, others are decision-makers, planners and monitors, and others are looking at themselves as relationship builders, networkers, and influencers.
- Complexities, shifts in authority, power and pushing locus of decision-making outwards, means that role of board is decreasing, and sometimes not needed, but the VS is not prepared to deal with this yet.

Learning outcomes

1. Lead volunteer program management including: volunteer policies, planning, legal issues, risk management, volunteer recruitment, interviewing, reference and criminal records checks, orientation, training, supervision, dismissal, staff/volunteer relationships, recognition, volunteers and technology.
2. Summarize board governance issues and practices
3. Implement a human resources program, including policy development, hiring and firing, training and orientation, performance management, flexible work arrangements, issues re young/mid-range/long term staff, diversity issues, employment policies and practices
4. Demonstrate union-management negotiation skills
5. Develop a healthy working environment
6. Develop a culture of learning
7. Manage team development and collaboration
8. Create a culture that celebrates creative decisions and innovative strategies and adapt to change
9. List laws related to Human Resources, e.g. criminal record checks
10. Outline components of appropriate liability insurance

TEAM DEVELOPMENT

~A leader sustains quality approaches to team development, enhancing the potential for creativity within organizational life~

Examples

- New Executive Director at Alzheimer Society appoints a Strategic Directions Team to draft a new strategic direction for the Society
- College Foundation appoints a Capital Campaign Team that includes fundraisers, marketing staff, financial record keeping staff, financial planners, and legal experts.
- Tennis Society creates a Renovations Team to develop a 5-year plan for Club renovations
- Poverty organization teaches facilitation skills to their Community Development Team: Appreciative Enquiry, World Café, and Open Space Technology

Current challenges & complexities

- Teamwork takes time and patience; sometimes it is easier to make unilateral decisions.
- The safety and security of a team also means the loss of individual power and control and loss of individuality. This tension must be understood and addressed.
- Constant consultation and collaboration often results in loss of focus and forward moving action
- Unproductive teamwork causes loss of energy, discouragement.
- Loss of a hierarchal structure and movement to horizontal structure increases multiple accountabilities, which are harder to manage.
- The work of individuals on teams is hard to appraise and evaluate and it is therefore hard to reward or fire staff.

Learning outcomes

1. Define: team, network, social capital, communities of practice, intellectual capital
2. Compare and contrast networked and hierarchical teams
3. Create a team mission statement
4. Identify gifts and weaknesses of team members to create effective teams.
5. Manage team growth and development
6. Develop virtual teams in different locations (e.g. nationally) and facilitate them moving from a loose network to a community of practice.
7. Create team measurement and reward strategies
8. Select and implement the right team development technique, demonstrate different types of facilitation skills
9. Maximize team innovation
10. Manage conflict, criticism, and disagreement
11. Negotiate effectively

HEALTHY WORKPLACE ENVIRONMENT

~A leader sustains a healthy workplace environment for self and others in organization~

Examples

- An angry husband drives his car through the door of the women's shelter. Nobody is hurt, because the staff and residents managed to escape out the back windows.
- A VSO moves from crowded, dark offices to a new space where every employee has a window and natural light. Morale soars.
- A Neighbourhood House offers 1-day per month as a Staff Reading Day – staff can take day to read and learn at home. They must be available to take phone calls.
- Staff and volunteers who raise \$10,000+ at Heart & Stroke Foundation share one weekend per year where they learn the latest information and research about heart disease and strokes from the researchers for whom they raise funds.

Current challenges & complexities

- The employees of some VSOs, and their clients, are exposed to threats to their personal security: women's shelters, homeless shelters, abortion clinics, counselling centres, drug addiction treatment centres, etc.
- The high cost of rent leads many VSOs to take space in older buildings, which may have higher levels of dust and mould, or be less accessible for staff, volunteers, or clients.
- The change in work patterns, with increased dependence on computers, can lead to physical problems, i.e. repetitive stress injuries. Many VSOs cannot afford to purchase proper chairs or desks for the computers.
- Average hourly earning of managers, professionals and technical/trades workers in the VS lag behind their counterparts in the for-profit/quango sectors. This

translates into substantial annual earnings differences.⁴ Poor salaries/benefits are drawbacks for job seekers who are deciding if VSOs are ‘employers of choice’ and also can lead to discontent in people already working in VSOs

- Most VSOs are very small (less than 10 staff), and are not likely to provide benefits to staff.
- There is a high percentage of part-time staff in the voluntary sector, the majority of whom like the flexible work and don’t want additional hours of work. The downside is loss of job security, poorer benefits and wages.
- There are high numbers of women in the VS, with post-secondary credentials, strong project management and organizational skills, and commitment to ‘public good.’ They will be sought in future by the quango and public sectors.

Learning outcomes

1. Implement occupational health policies and practices: safe storage of hazardous materials, fire, safety, personal security, ergonomics, accessibility and accommodation, etc.
2. Implement policies re harassment, job related policies, e.g. overtime, sick time, time off
3. Analyze human resource policies and practices, e.g. salaries/benefits, performance appraisal, etc.
4. Establish interesting and challenging work, provide opportunities to grow and learn, develop a good leadership style, provide a pleasant and stimulating work environment, ensure work-life balance
5. Develop flexible work arrangements – flexi-time, working from home, job sharing, work-life balance, etc.

⁴ McMullen, Kathryn; Schellenberg, Grant, *Job Quality in Non-profit Organizations*. Canadian Policy Research Networks Inc., 2003. <http://www.cprn.org> [April 2003]

COLLABORATION

~A leader encourages and supports collaboration, and optimizes and builds individual-organization-community-global relationships, by developing shared strategies among diverse talents, cultures and assets~

Examples

- Jewish Women's Foundation and Hebrew University Society hold joint fund raising event.
- Matthew Coon Come formed a coalition with other indigenous peoples and environmental VSOs at the Earth Summit in Rio to defend indigenous peoples' traditional use of the land.
- Crisis line and women's shelter co-develop a public education program.
- Dance VSOs rent a building together (Dance Centre), share practice rooms, photocopier, fax, phones and receptionist.
- Boys & Girls Club merges with Youth Offender program. Although the Boys & Girls Club is much smaller, the new organization takes their name because they have more credibility and recognition across Canada.
- On-line collaboration, e.g. One World web site (most human rights and sustainable development organizations).
- Coalition (lawyers, social workers, parents, government representatives, seniors, people with mental illness, mental handicap, physical disability, head injury, etc.) develops new guardianship legislation.
- The Alliance for Arts & Culture develops a collaborative marketing program for arts and culture groups in the Lower Mainland of BC.

Current challenges & complexities

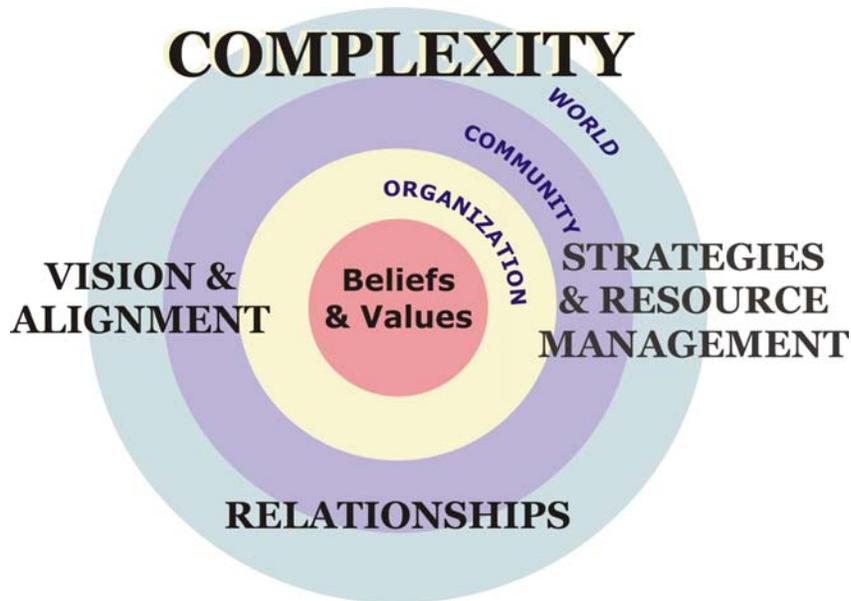
- Leaders are no longer asked just to manage their own organizations; they are asked to work collaboratively with other communities and VSOs world-wide
- Accountability is diffused in partnerships and collaborations.

- Leaders have to understand complex relationships, build trust, and empower individuals and organizations
- Leaders have to balance community needs with their own organization's needs.
- VSOs collaborate in difficult relationships and projects, e.g. joint fundraising (how is the money divided?)
- VSOs need to be aware of the need for social inclusion – need to include new people/partners and ensure that they can contribute each time a new collaboration is formed.
- Funders and government are requiring or dictating complicated or complex collaborations and mergers
- Leaders have to balance cooperation and collaboration with competitiveness and confrontation.
- Leaders need to balance controlling information, forcing agreement, dealing with contentious groups, dealing with layers of hierarchy, finding right degree of information flow, manage diversity and differences, build connections inside and outside their VSO, and negotiate power differential and anxiety

Learning outcomes

1. Identify relevant external groups, define relationships and connections with each
2. Define and identify examples of partnerships and collaborations: communication, contribution, coordination, cooperation, collaboration, joint ventures, consolidation of administrative/fund raising functions, mergers
3. Lead a collaboration of equals (e.g. define the role, responsibilities, leadership styles needed, etc.)
4. Document a collaborative process for several groups working together
5. Integrate systems theory and thinking to understand self, relationships in groups and teams, in organizations, and in local and global contexts
6. Define key factors that contribute to the success or failure of a collaboration
7. Develop communities of learning
8. Develop collaboration or partnership agreement, e.g. for financial or other commitments

COMPLEXITY



The Complexity competencies relate to leading voluntary organizations in a complex, interdependent world where the organizational, political, social and institutional environment is undergoing unprecedented change and turbulence. These competencies are essential for understanding the larger context and systems within which leaders of organizations work, as well as functioning successfully within them. The most important of these competencies are:

- ***CREATIVE AND INNOVATIVE CULTURE***
- ***ADAPTATION TO CHANGE***
- ***MULTIPLE ACCOUNTABILITIES***
- ***INTERDEPENDENT PERSPECTIVE***
- ***AWARENESS OF CONTEXT***
- ***COOPERATION AND COMPETITION***

CREATIVE AND INNOVATIVE CULTURE

~A leader sustains a culture that celebrates creative decisions and innovative strategies, where individuals are inspired to find creative solutions to complex problems, which contributes to long-term viability~

Examples

- A group of seniors were concerned about the future of their mentally handicapped adult children, i.e. did not want their children put into 'care' after their deaths. They developed an innovative solution – they all purchased insurance policies whose recipient was a VSO that would ensure natural community-based support and friends for their sons and/or daughters (Planned Lifetime Advocacy Network).
- A VSO run by and for people with mental illnesses ran into difficulty when their Executive Director became manic. They developed innovative solutions and policies, mentorship and interim staff from another VSO.
- United Community Services is a collaboration established by several VSOs to share administrative costs (e.g. phone services, purchase of paper/supplies, etc.) It has grown into a collaborative of many agencies, cooperating and sharing in many ways.
- Agencies and individuals (e.g. VSOs, police, fire, mail delivery, banks) work together in Community Response Networks to prevent and address abuse, neglect, and self-neglect of vulnerable adults.

Current challenges & complexities

- Creativity and stability are both important – both entail risk.
- Creativity and innovation emerge from great tension and apparent irreconcilable differences. In traditional management, differences are reconciled. In creative management, focus is on differing perspectives and seeking a new way forward.
- External networks or affinity groups can be a source of innovation and creativity.

- Organizations are most adaptive when they are almost out of control or hitting 'rock bottom'.
- Creative tension is derived through strategic imbalance, which occurs at the limits of, or outside of, organizational consensus or the boundaries of the organization.
- Organizations consist of legitimate and shadow systems. The 'legitimate system' has formal hierarchy, rules, and communication. The 'shadow system' consists of hallway conversation, grapevine, rumour mill, and informal procedures. Much creativity resides in the shadow system (diversity of thought and approach, few rules or constraints).
- Continual reflection and learning are key for VSOs. VSOs must try small experiments (this may incur risk), reflect, and then gradually shift time and attention toward what's working best.
- VSOs need to look at mistakes as a learning process rather than punishing people, yet need to handle difficult issues well and appropriately.
- VSOs need time for creativity and for courageous conversations.

Learning outcomes

1. Improve personal creativity
2. Stimulate team creativity
3. Discuss how to hire and retain creative employees
4. Build creative teams and enable them to think together as a group.
5. List and define techniques to enable creativity (brainstorming, asset-based facilitation skills)
6. Feel comfortable with differences, debates and ambiguity before facilitating convergence.
7. Foster creativity in VSO: calculated risk-taking, continuous learning, rewards for learning, scheduling time for creativity and courageous conversations, listening to the shadow-side of VSO, e.g. hallway conversations, water-cooler gossip
8. Develop effective reward systems for creativity and innovation.

ADAPTATION TO CHANGE

~A leader leads the constant adaptation to change in self and others in response to evolving circumstances within and among organizations, within a global context~

Examples

- Art galleries have long displayed art that they legitimately purchased (but that was previously stolen by Nazis). They are returning the art to the legitimate owners. They must adapt to this change economically, replace the artwork, re-build relationships, re-write policies and practices, etc.
- After years of VSOs campaigning to retain BC wilderness for parks, the government became deaf to these issues. Some VSOs switched to talking in economic terms about the value of the wilderness to tourism. This way, critical parts of BC are being saved from forestry, mining, etc.
- Museums are now returning human remains and artifacts to First Nations groups and assisting them to build museums, learn curating skills, care for these artifacts themselves.

Current challenges & complexities

- Growth in size and complexity of VSOs, rising demands for consistency in service availability/quality, accreditation and standards development, fear of failure, and loss of funding lead to greater control, unionization, accountability and regulation. This results in less flexibility and responsiveness to change.
- VSOs need to be fast, agile, intuitive, and innovative. VSO bureaucracy, accountability, accreditation and evaluation often limit flexibility, response time and the ability to change. Funder's (e.g. United Way, foundations) and governments' control of the social agenda may limit VSOs ability to change
- Leaders need to have skills for creativity and innovation, professionalism to perform, and openness to collaborate, include and empower.
- The VS needs to look at what social change is happening outside of the sector, e.g. anti-globalization

- VS clients' lives are increasingly complex; VS must refrain from institutionalizing their lives. VSOs are often too focused on implementing service delivery instead of solving problems.
- Sometimes VSOs do not take time to find root causes of the problem and sometimes try to just 'fix' what they are doing. VSOs need to challenge what they and the sector are doing and not be blind to current realities. Time needs to be allocated for these courageous conversations.
- Programs that respond to the need to change quickly may be hard to evaluate, therefore may be unfundable.
- VSOs must adapt to the public, government and donor demand for greater accountability.
- The sector needs to balance the ability to learn from our history and the wisdom of our elders with the need to find new and different answers. Not all wisdom begins with this generation, yet VSOs constantly seek new, innovative answers.

Learning outcomes

1. Explore personal ability to adapt to change
2. Tune into external environment
3. List creativity and innovation techniques, including allowing time for reflection, self-analysis, study and courageous conversations
4. Honour and challenge prevailing wisdom
5. Communicate a compelling vision
6. Build creative collaborations/ teams
7. Manage change (hiring/supporting creative staff, funding issues)
8. Provide examples of complexity science in the workplace
9. Delegate and disperse authority and decision-making
10. Identify ways to persevere with set-backs
11. Recognize and reward creativity and innovation

MULTIPLE ACCOUNTABILITIES*

*Both VSOs and individual staff have multiple accountabilities.

~A leader ensures multiple accountabilities, making appropriate decisions in the face of dynamic tensions among multiple stakeholders~

Examples

- A staff person is assigned by an Executive Director to provide Patient Services. She is unable to provide services because her team leader tells her to focus on policy development. As a result, the Executive Director cannot fire her for unsatisfactory job performance.
- Kidney Foundation has two objectives: to fund research and provide services to patients, i.e. they are accountable to researchers and patients who may want different priorities. They must work hard to balance both needs.
- After the Rwandan genocide, NGO's developed a Code of Conduct, Humanitarian Charter, technical standards, Active Learning Network, explored accreditation, and identified their accountabilities thru a Humanitarian Accountability Project.
- A donor wishes to give substantial money to fund a children's program, yet children's programs are not the priority of the VSOs board. The VSO must decide what to do.
- A funder changes its focus, threatens to withdraw funds from a VSO unless they change the programs that are supported by clients, donors, board, etc. The VSO must resolve its multiple accountabilities to funder and clients.

Current challenges & complexities

- Accountabilities are often not clear – accountable to whom? For what? By when?
- Staff members are now accountable to several 'bosses' – e.g. Executive Director, Board committees, team members. Board members are also clients of the staff - this is ambiguous and hard to manage.
- Board governance is often misunderstood. VSOs often have conflicting ideas about board-staff roles and relationships, and organizational accountability.

- Some people believe there is no role for a board that oversees a 100% government funded VSO (i.e. it is accountable to the government not to the board)
- Accountability, accreditation and standards are often static and inhibiting, and thus impede change and creativity, and ‘professionalize’ relationships that should be continuous, immediate and human.
- Horizontal organizations (vs. hierarchal organizations) generate multiple accountabilities that are harder to manage.
- Multiple stakeholders may have different and conflicting interests, and thus prevent accountability.
- Stakeholder accountabilities often must be prioritized (e.g. which accountability is more important to the VSO): financial accountability to the funder or moral accountability to the client?
- It is often not clear if VSOs speak as their clients, with their clients, for their clients or about their clients. If this is unclear, then accountability is unclear.

Learning outcomes

1. Define accountability (personal and organizational)
2. Define ways to manage multiple accountabilities of staff members
3. Optimize governance: identify different governance models, committee roles, nominations, board vs. staff roles, legalities, accountability issues, discuss responsibilities re accountability
4. Identify groups to whom VSO is accountable
5. Develop ways to be accountable to multiple stakeholders with differing interests, e.g. social audits
6. Demonstrate how to manage/negotiate conflicting accountabilities (for individuals and organizations)
7. Define when to carry out quantitative and qualitative monitoring and evaluations.

INTERDEPENDENT PERSPECTIVE

~A leader demonstrates interdependent perspective, recognizing the interdependence, self-organizing capacity and emergent elements of a complex system~

Examples

- 137 plant, animal and insect species are lost every day due to rainforest deforestation, i.e. 50,000 species/yr. Currently, 121 prescription drugs sold worldwide come from plant-derived sources. While 25% of Western pharmaceuticals are derived from rainforest ingredients, scientists have tested less than 1% of these tropical trees and plants. Health VSOs depend on environmental VSOs to protect rainforests (and therefore their access to medications).
- Social justice VSOs are funded by the Law Foundation who gets their funds from the interest from lawyer's trust accounts mostly generated from real estate sales. If the housing market is low, the Law Foundation has fewer funds to give.
- Heart/Stroke, Cancer, Diabetes, Kidney Foundation, Salvation Army collaborated when the Better Business Bureau (BBB) advised BC people to stop giving to door-to-door canvassers. VSOs persuaded BBB to advise public on responsible giving rather than blocking door-to-door campaigns.
- AIDS VSOs represent and work with a diversity of interests: gay, First Nations, drug users, sex trade workers, people with haemophilia, blood donation recipients, etc. They value these interdependencies.
- Anti-war groups divide up responsibilities: United for Peace & Justice does demonstrations and supports non-violent civil disobedience. Win Without War focuses on media and confrontation.
- US environmental foundations give \$40 million (interest on investments) to BC VSOs, more than all other BC funders combined. If the economy slows down (e.g. due to war), interest income is low and environmental organizations do not get as much money.

- Fallsbrook Centre in NB hosted an international conference so Canada could learn about sustainable development from Cuba and Uganda. Organic agriculture in Cuba is due to inability to get chemical fertilizers and pesticides since Russia's pullout. In Uganda, organic agriculture increased with political instability under Idi Amin resulting in less access to chemicals.

Current challenges & complexities

- VSOs and society are undergoing massive change. New issues and new VSOs are arising frequently
- VSOs and other organizations collaborate at the individual, organizational, community level.
- Interdependencies are often multi-dimensional. VSOs are interdependent and they are also dependent on associations in the community and world. To weaken one is to weaken all, e.g. if the local newspaper closes, VSOs will lose a voice.
- VSOs are affected in many ways by world events, e.g. wars and world economies
- Society is trying to prepare for information that we do not know yet (e.g. knowledge management)
- Groups, e.g. rich and poor, are interdependent. They try to relate to and work with each other; but rarely can individuals 'walk in two worlds'
- Often VSOs are dependent on their clients for their existence, and clients are dependent on VSOs for assistance. This is a relationship that needs constant exploration and attention.

Learning outcomes

1. Analyze various ethnographic approaches and their relationships/interdependencies
2. Analyze culture and habits of VSOs, corporations, levels of government (including international)
3. Apply systems thinking and interest based negotiation
4. Research and prepare to be accepted into a group that has a different culture, orientation or language than your own
5. Manage collaboration and teamwork
6. Discuss tensions between community and individuality/individual freedom
7. Compare and contrast collaboration/cooperation and competition/confrontation

AWARENESS OF CONTEXT

~A leader demonstrates awareness of the environment, assessing contextual systems and structures, economic systems, & structures in the natural environment~

Examples

- Overseas VSOs are sometimes not aware of the environment, e.g. planting corn in Nepal (Nepalese people eat barley, not corn) or building lakes for fish farms in communities that don't eat fish.
- North Vancouver VSOs respond to their community by providing services to a large Farsi-speaking community, unique in Canada, developed without precedent.
- Currently US high tech corporations are donating overseas to counter anti-Americanism. Development VSOs believe this is corporate self-interest, pushing technologies on naïve populations, and that their products may not increase productivity.
- John McKnight challenged VSOs in 70's/80's re accepting government funds. He suggested that funds be given directly to individuals to purchase their own services, as this would ensure quality services and individual choice.
- 130 Residential schools existed in Canada. In 1907, P.H. Bryce, Medical Health Officer for Indian Affairs, found a death rate of 24%/annum in residential schools. When tracked over a 3-year period, the death rate increased to 46%. First Nations children were not allowed to attend university until 1960. The last residential school closed in 1996 in Saskatchewan. Was the voluntary sector aware of this reality/context? If not, why not?

Current challenges & complexities

- VSOs need to be aware of the internal and external environment (social/cultural/environmental/financial) and become flexible and responsive. It is important that VSOs are comprised of a similar population to the one they

serve. VSOs need to decide if they should advocate for the VSO to get funds or clients to get them.

- The external environment is changing rapidly: just-in-time workforce (outsourcing, temps, retirees, volunteers). There is increased worker diversity, aging work force, and a need for work-life balance. There are increased numbers of very elderly people (85+), a higher median age, increased cultural, disability, gender, language issues, and these vary from community to community. Technology is changing rapidly; the world's information doubles every 2 - 2.5 years and scientific information doubles every 5 yrs.
- While the VS needs to be more active with government, governments themselves are changing in many ways. There may be an increase in single-issue politics (e.g., Green Party, Rhino Party, Marijuana Party, Alliance, Bloc Quebecois). There is a power shift from federal to local government. Government access is increasingly self-service (via touchtone phones, or by Internet). There is an increase in public-private partnerships.
- Customers are more informed and want more information instantaneously (24/7).
- We are living with a 'global vs. local' paradox (i.e. we compete globally yet want loving neighborhoods) and a 'futurism vs. nostalgia' paradox (i.e. we are moving rapidly into the future and have to adapt, yet have a need to cocoon).
- VSOs need to make complicated decisions related to their environments, e.g. should they purchase a cheap van to transport clients if it is not environmentally sound? Should Heart & Stroke hire overweight people? Should the Canadian Cancer Society refuse to hire smokers?

Learning outcomes

1. Explore cultural, social, economic, environmental, technology trends and issues in your external environment
2. Identify potential future issues
3. Prioritize the issues that are important to your clients, your VSO, & the local and global communities

4. Explore changing demographics, governments, global issues, etc. in your VSO and community.
5. Challenge current ways, and explore different ways, of operating. Have courageous conversations

COOPERATION AND COMPETITION

~A leader excels at both cooperation/collaboration and competition/confrontation, as required to meet objectives and sustain relationships~

Examples

- Several years ago, the BC government invited the best BC AIDS activists to cooperate and help identify priority-funding issues. When complete, the government funded \$2.7 million instead of the prior year's \$7.2 million. The AIDS VSOs struggled but could not recover their original funding levels as their activists had been co-opted by government.
- Two weeks into the Iraq war, the most influential antiwar coalitions shifted away from large-scale disruptive tactics and stepped up efforts to appeal to mainstream Americans. Win Without War encouraged 2 million people on its e-mail list to send supportive letters to soldiers. Other groups have redoubled their fund-raising for billboards that declare, "Peace is Patriotic" and include the giant image of an unfurling American flag. They have moved from confrontation to cooperation.
- March 28, 2003, British aid agencies signed a statement declining financial support from the government for their relief work in Iraq for fear of compromising their independence. Oxfam, Save the Children, Christian Aid, ActionAid and Cafod said such aid would be inappropriate while fighting continues. "It is impossible for armed forces fighting a war to provide impartial humanitarian assistance on the basis of need. By definition, the priorities of combatant forces are military and adversarial, not humanitarian." Cafod said it "could not envisage circumstances under which it would accept money for war-related humanitarian work from any belligerent party in a war against Iraq during the fighting."
- The Canadian Cancer Society's policy is 'no designated funds'. As a result breast and prostate cancer agencies have been formed to respond to donors' desire to address specific issues and these groups are competing now for funds.

Current challenges & complexities

- A good leader is one who knows how to, and prefers to, cooperate, but is also a skilful competitor when provoked to competition. Leaders need both strategies. The always-cooperative leader may be undermined by the competition. The always-competitive leader may not be included when alliances are formed.
- VSOs need to know when to cooperate/collaborate and when to compete or confront funders, governments, media and others. Often, there is substantial risk involved.
- Collaboration takes time, funds and focus away from other activities. Decisions need to be made about when to collaborate and when to make a unilateral decision.

Learning outcomes

1. Lead cooperative and collaborative activities
2. Negotiate conflicts or conundrums between personal and organizational values, priorities, etc.
3. Understand competition, explore confrontational techniques, e.g. legal recourse, social activism
4. Implement interest-based negotiation
5. List and implement complexity science techniques
6. Develop policy and principles
7. Lead political action
8. Demonstrate political acumen

AUTHOR'S ACKNOWLEDGEMENTS

I believe that everyone has a Bethlehem in their life – a time when their world changes for the better. This project was such a moment in my life. The project was a private meditation on the qualities of leadership in Canada. It made me immensely proud to be Canadian and full of admiration for our voluntary sector leaders.

I worked in my home office alone, reflecting on my experiences and knowledge of the voluntary sector. Sometimes I had to reach out to my friends and colleagues through late-night phone calls with questions like . . . “Can you name a leader who exemplifies great courage . . . and is Canadian . . . and comes from the voluntary sector?” After they responded with, “What the heck are you talking about?” the conversations became fascinating and truly rewarding. I hope that these competencies and this paper spark conversations, across Canada, whether they be cheers of agreement, public debate or voices of disagreement. All these conversations will help us build strong leaders and lively voluntary sector organizations. I believe that the voluntary sector continues to be the voice of Canada’s conscience, and we do well to keep it healthy and vibrant.

Thank you to Keith Seel, Wendy MacDonald, Grant MacDonald, and Brenda Herchmer who guided the development of the framework for this paper and to Paul Brennan for his valuable additions and insights into this document. I am deeply grateful to three individuals who met with me and shared their insights about some of the competencies that caused me most difficulties: Leslie Kemp, Cindy Blackstock, and Marnie Goldenberg were inspirational and insightful . . . thank you. Diana Smith, Lee Anne Johnstone, Pierre LaCroix and I worked together to enable leaders across Canada to identify the list of competencies; congratulations to my three talented colleagues for their insightful work. My appreciation goes to Doug Soo of Langara College for his support of my work and for his brilliance as a community leader. And a thousand thanks go to Bev Suderman, the coordinator of the National Learning Initiative for her support, insights and faith in me . . . she is a outstanding project coordinator.

Kindest regards,

Chloe O’Loughlin May 16th, 2003

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This revised edition has benefited from the assistance of Mr. Patrick Merrien, of Cégep de Sorel-Tracy (QC), who convened a group of voluntary sector leaders to identify examples of the competencies in action in French Canada. His assistance is much appreciated by the author, as well as by the NLI Project Manager, Beverly Suderman.

THE VSI CAPACITY JOINT TABLE

The National Learning Initiative for the Voluntary Sector project is one initiative funded by the Government of Canada through the Capacity Joint Table of the Voluntary Sector Initiative (VSI). The Capacity Joint Table, one of 7 joint tables created to undertake the work of the VSI, undertook projects in four key areas of capacity-building for voluntary organizations:

- *Research and Information Sharing*
- *Skills Development and Recruitment*
- *Policy Capacity*
- *Financial Capacity*

These projects have resulted in a multitude of resources that are available to non-profit and voluntary organizations, governments, educational institutions, volunteers and voluntary sector researchers. Many of the products will be released during 2003.

For more information about these projects, the joint tables and the VSI, please check the VSI website at www.vsi-isbc.ca.

This project was supported by funding from the Capacity Joint Table, through the Social Development Partnerships Program of Human Resources Development Canada (HRDC). The views expressed in this publication do not necessarily reflect those of the Government of Canada.

Resources from the Capacity Joint Table

The Capacity Joint Table (CJT) was one of seven Government of Canada–voluntary sector tables established under the Voluntary Sector Initiative (VSI). The VSI's long-term objective is to strengthen the voluntary sector's capacity to meet the challenges of the future, and to enhance the relationship between the sector and the federal government in order to better serve Canadians.

SKILLS DEVELOPMENT AND HUMAN RESOURCES MANAGEMENT

Developing Human Resources in the Voluntary Sector (HRVS) www.hrvs-rhsbc.ca

National Learning Initiative (NLI): A National Skills and Learning Framework for the Voluntary Sector and **Voluntary sector leadership competencies** www.nvo-onb.ca

RESEARCH AND INFORMATION SHARING

The Capacity to Serve: A Qualitative Study of the Challenges Facing Canada's Nonprofit and Voluntary Organizations www.nonprofitscan.ca

National Survey of Nonprofit and Voluntary Organizations (NSNVO)
www.nonprofitscan.ca (2004)

Johns Hopkins Comparative Nonprofit Sector Project www.nonprofitscan.ca (2004)

National Survey of Giving, Volunteering, and Participating (NSGVP)
www.givingandvolunteering.ca

POLICY CAPACITY

Policy Internships and Fellowships:

Bridging the Policy Dialogue Between Voluntary Organizations and the Federal Government
www.cvsrd.org and <http://publicadmin.uvic.ca/cpss>

Participating in Federal Public Policy: A Guide for the Voluntary Sector www.vsi-isbc.ca

FINANCIAL CAPACITY

Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations www.ccsd.ca

Resources for Accountability and Financial Management in the Voluntary Sector
www.vsi-isbc.ca

Inventory of Effective Practices in Financing and Resourcing of Voluntary Sector Organizations in Canada www.vsi-isbc.ca

These projects are funded by the Government of Canada through the Voluntary Sector Initiative.

For more information, visit www.vsi-isbc.ca
or fax the Capacity Joint Table Secretariat at 819-997-2056.

Voluntary Sector

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