Recommendations for
Capacity Building Learning Plan

Prepared by Brook Thorndycraft
For the Community Sector Council of Nova Scotia
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Introduction

This report is a series of recommendations for a Learning Action Plan to direct the work of the Community Sector Council of Nova Scotia's Capacity Building and Innovation pillar.

The project came about out of a recognition that the Nova Scotia community sector does challenging and important work, with deep commitment and capacity to improve the lives of Nova Scotians, and also that there are a range of obstacles that can get in the way of having impact in terms of shifting systemic issues.

We set out to answer the following three questions:
- How can CSCNS help the community sector increase its impact on complex problems like poverty and injustice?
- What are the obstacles the community sector is facing?
- How can CSCNS support the community sector's capacity building needs?

The following is an action plan to support the learning and capacity building needs of the sector in relation to these needs. In this report, I will:

1) Describe the qualitative and quantitative data collection methods used to assess the needs of the Nova Scotia community sector, and provide data about research participants
2) Discuss the theoretical influences on this work, and define a Theory of Change for social impact learning in complexity
3) Review the findings and themes that arose out of the qualitative data about what people identified as capacity building needs
4) Describe adult education pedagogical principles that are essential for supporting learning in complexity
5) Suggest a draft Action Plan for learning that supports capacity building around systems thinking and innovation, resourcefulness, collaboration, healthy workplace culture, and strong and dispersed leadership.

It is important to note that while this project was originally intended to inform the work of the Educate and Innovate pillar at CSCNS, in the process of doing the research, it became clear that this work demands an integrative approach that includes the other two pillars, particularly the Collaborate and Activate pillar. Throughout this report, you will see references to how I envision Collaborate and Activate as being an essential part of this work.

Context

The last year and a half has been defined by a series of shocks. The global pandemic has shown us how quickly what we take for granted can shift and change, and levels of complexity in the world that it's hard for us to conceptualize. It has laid bare and exacerbated deep inequalities around race, gender, class, and luck of birth place, and has led to new crises around mental health, housing, economic inequality, and whose lives are valued and whose aren't. It has also been a time of awakening around racial injustice, the ongoing impacts of colonization and enslavement, and the need for us to take concrete steps toward ending the causes and healing the effects of racial and other kinds of oppression. And then there is the increasing frequency and severity of unusual climate events and extreme temperatures, and increasing recognition that we need a just transition off of fossil fuels.

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We are in a time of deep transformation and crisis. Many people and organizations are waking to the realization that we have to do things differently, but that we don't have the skills, mindsets, and ways of being that can help us to understand and navigate the complex problems we are facing. We are living in a world of complexity, volatility, ambiguity, and uncertainty, but the skills we learn, and the systems that teach us are still designed as if this wasn't true (Spencer-Keyes et al., 2020, p. 21). Spencer-Keyes et al argue that we need to develop new meanings and solutions, and that we need to do this collaboratively, rather than seeing learning as an individual process for personal advancement (2020, p. 10). This report offers a suggested framework for community sector learning that will support people and organizations to develop the capacity and the resilience to engage collectively to impact complex and changing realities.

Leadership Challenges

As I was going through the literature as well as the data, it was clear to me that capacity building for leadership is a major element of what is needed for the sector to be able to act for change both in organizations and in the broader society, within a context of complexity.

Clutterbuck and Arundel describe a series of complex pressures, changes, and uncertainties experienced by nonprofit leaders in Ontario, many of which are very relevant to findings in this report (2017, pp. 13–14):

- Leadership is complex and dynamic, and is demonstrated in a range of ways, not just through formal positions. Capacity to lead in formal and informal ways needs to be nurtured throughout organizations and the sector
- Leaders are working in a context that is unstable, complex, changing, and turbulent
- Changes to technology have ongoing positive and negative impacts on organizations that require adaptation
- There is immense economic, social, environmental, and political pressure on the community sector, and particularly on leadership
- Jobs are becoming more precarious, and organizations are having trouble attracting the next generation of leadership
- Community sector organizations are dealing with ongoing government offloading of service responsibilities, leading to capacity difficulties
- Pressures to demonstrate impact and accountability influence the focus of leadership toward reporting and away from activities that lead to impact
- Demographic changes are leading to a need to increase support for emerging leadership and also additional needs of an aging population to be served by the sector
- The increasing focus on diversity is both a pressure and an opportunity to move toward an increasingly diverse workforce and leadership
- There are increasing opportunities (and need) for innovative collaboration and cross-sectoral relationships between nonprofits and with private and public sectors
- Leaders are recognizing the need for collaboration even within a competitive environment
- Funders want more evidence in exchange for fewer resources, meaning there are increased reporting requirements for less sustainable funding
- Social innovation and entrepreneurialism are recognized to be a potentially self-sustaining model, but require skills that aren't common in the community sector

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As Clutterbuck and Arundel explain, "While the existing and emerging trends seem clear, the capacity of this highly diverse sector to anticipate, innovate, adapt, or respond is less clear. This, of course, is the major challenge for nonprofit leaders over the next few decades." (Clutterbuck & Arundel, 2017, p. 16)

For this reason, you will see in this report that leadership capacity building is a thread that weaves throughout every section, and is fundamental element of the framework described.

Guiding Values

Based on conversations with staff at CSCNS, my interpretation of the research, and my own perspective on guiding principles for this work, I have approached this project with the following guiding values:

- Decolonization, Justice, Equity, Diversity, and Inclusion
- Collaboration
- Commitment to supporting learning ecosystems and experiential learning
- Supporting change making in complex systems
- Building healthy people, organizations, and sectors

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Methodology

I was hired in January 2021 by CSCNS to co-create and facilitate a community engagement research process that culminated in this report.

In the initial phase of the project, I reviewed past data collected by the CSCNS in previous research in order to inform research design, and determine what was already known about the capacity building needs of the sector. Research reviewed included:

- APEC survey data: The State of the Nonprofit and Voluntary Sector in Nova Scotia
- Focus group notes from ED Network meetings around the province about capacity and support needs
- Notes from interviews about brainstorming future careers in the nonprofit sector
- Community Consultation raw data

Open Forum

Following the initial research, I designed and co-hosted with CSCNS a two-hour Open Forum process on March 9th, 2021, in which 28 people participated in a brainstorming session exploring the challenges faced by Nova Scotia community organizations. We asked participants to identify issues faced by the sector on four levels: 1) individual staff and volunteers; 2) organizations; 3) the sector; and 4) systemic. We followed the brainstorming session with small group discussions expanding on the issues named in the brainstorm. Participants reflected on the following questions:

- What insights or questions came up for you as you did the brainstorm exercise?
- Which themes did you pick as the ones that are most important in your context and why?
- What kinds of support would help you or your organization build your capacity in these areas?

Following the Open Forum, I coded the data and grouped the results into the following ten themes or key challenges: 1) Workload and Burnout; 2) Collaboration; 3) Lack of Resources; 4) Changing Conditions and Complex Problems; 5) Scarcity Mindset; 6) Board and Staff Dynamics; 7) External Sector Relations; 8) Justice, Equity, Diversity and Inclusion; 9) Staffing Issues; and 10) Funding Models.

Focus Groups

We used the results to inform the design of focus group questions. We hosted a total of five focus groups between March 24th and 31st, 2021, with a total of 15 participants, including Executive Directors, funders, staff, consultants working with the sector, and volunteers including board members. Whereas the Open Forum sought a broad scan of challenges, the focus group questions encouraged participants to identify their particular learning and capacity building needs in the face of identified obstacles. Questions included:

- What's getting in the way of your organization being able to have the impact you want to have?
- What kinds of training or learning would help you or your organization build your capacity in these areas?

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- If CSCNS is planning to offer 5-10 courses over the next year, what would you want to see them on?
- Emerging questions that arose in the conversation.

Following the focus groups, I coded focus group notes and grouped the data into 12 themes identifying where participants felt their organizations would benefit from capacity building. The themes were: 1) System change; 2) Advocacy with funders and government; 3) Partnerships and collaboration; 4) Staff skills for managing an organization; 5) Board skills for managing an organization; 6) Justice, Equity, Diversity and Inclusion; 7) Innovation; 8) Evaluation, reporting and fundraising; 9) Virtual facilitation and teambuilding; 10) Program delivery; 11) Healthy workplace; and 12) Career development and advancement.

Survey

Concurrent with, and informed by, the Open Forum and focus groups, the CSCNS collaborated with Inspiring Communities to design a 28-question survey. We developed the questions based on organizational experience in the sector, the information about sector obstacles and needs from the Open Forum and from past surveys, and from academic and sector-specific research about what kinds of training and capacity building are most supportive of organizations thriving and being able to impact systemic issues. A total of 193 people responded to the survey. We included a mix of demographic, quantitative, qualitative and scaling questions.

Demographic Questions: We designed demographic questions to get a sense of the kinds of organizations that were responding to the survey, including type of organization (not-for-profit, registered charity, etc); organizational mission; region(s) served; and demographics served. We also asked for information about the role of the person responding, the size and budget of the organization, and the number of years the person has worked in the community sector.

Quantitative Questions: We asked a series of quantitative questions designed to elicit information about challenges and capacity building needs. Areas of questioning included: Organizational internal and external challenges and workplace culture; Understanding and implementing Justice, Equity, Diversity and Inclusion (JEDI); and particular training and learning priorities.

Qualitative Questions: We used qualitative questions to expand on people's responses around training and learning. Qualitative questions included:

- Please elaborate on the challenges you are experiencing.
- Please elaborate on what has been challenging or confusing about implementing JEDI
- What tools and resources would be helpful for your organization in the next year?
- As an organization ,what are you most interested in learning right now?

I reviewed the responses to these questions, with a focus in particular on the last two questions, and coded and themed the qualitative responses. I combined the themes from the survey with findings from the focus groups, and defined five overarching themes, each with several subthemes. They are as follows:

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1. **Leadership skills for running an organization:** HR Management; Leadership Competencies; Operations; and Governance
2. **Staff skills**: Virtual Work Skills; Program Delivery; Communications; and Basic Job Skills
3. **Psychological Safety**: JEDI; Burnout, Workload, and Mental Health; and Healthy Workplace
4. **Organizational Sustainability:** Evaluation; Reporting; Fundraising and Sustainability
5. **Complexity and Systems**: Advocacy for change; System Change; Partnerships and Collaboration; and Innovation and Adaptability

These themes will be further explained in following sections.

Scaling Questions: In order to understand organizational learning and mindsets that might be impacting community sector organizations' capacity, we asked a series of seven-point Likert scaling questions that explored people's perceptions of the following themes:

1. How successful the respondents' organizations are in meeting their social, environmental, and/or cultural objectives, which included questions such as:
    a. The majority of people served experienced improvements to their quality of life as a result of the services we provided in the past year
    b. The quality of services offered has improved in the past year
2. The extent to which respondents' organizations nurture a learning perspective in their work (learning organizations), which included questions such as:
    a. We can make mistakes and ask questions when we don't know something
    b. Leaders make their own learning visible and model the practices of a learner
    c. We are encouraged to change direction when we realize we are not meeting our goals
3. The extent to which respondents' organizations seek and pursue opportunities (innovation), which included questions such as:
    a. People in our organization are encouraged to take calculated risks with new ideas
    b. We actively introduce improvements and innovations in our organization
    c. Our organization prioritizes and makes time for strategic thinking
4. The degree of resourcefulness of respondents' organizations, which included questions such as:
    a. We use any existing resource that seems useful to respond to a new problem or opportunity
    b. We see other organizations as collaborators with whom we can expand the scope of our resources

The findings from these scaling questions informed our Theory of Change and will be explored in more detail in the following section.

Prototype Capacity Building Workshops

Based on needs expressed in the survey and focus group data, we developed a series of five prototype capacity building workshops in collaboration with Inspiring Communities, which were hosted in May and June 2021.

We picked the following topics based on the survey and focus group data:

- Collaboration and Partnerships: Developing relationships across shared focus areas with other organizations (Session 1: 43 participants, Session 2: 12 participants)

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- Planning for Uncertainty: How to Build an Agile Strategy (Session 1: 46 participants, Session 2: 15 participants)
- Evaluating Your Impact: Measuring & Communicating Value (Session 1: 19 participants, Session 2: 12 participants)
- Influencing Policy Decisions: Advocating for Systems Level Change (Session 1: 14 participants, Session 2: 11 participants)
- Psychological Safety in the Workplace 101 (Session 1: 17 participants, Session 2: 12 participants)

Each training was two online sessions of 90 minutes each, focusing on a combination of information provision, small group discussion, and practical tools. The two 90 minute sessions were spaced four weeks apart so that people could apply learning and come back with questions.

From initial review of evaluation data, my interpretation is that while people found the sessions to be too short, they were helpful introductions to the topics. All of the topics resonated with people, and would potentially be good as longer and more in-depth trainings. That being said, all sessions saw a drop in participation between sessions 1 and 2. It would be helpful to review the feedback in more depth to identify possible reasons for this drop.

I will say more about how these topics might be expanded in the following parts of this report.

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Learning Action Plan Theory of Change

Based on research into some of the important capacities for change making, we asked questions in the survey to assess respondents' perspectives on their organizations': 1) degree of success achieving their desired social impact; 2) health of the workplace culture; 3) entrepreneurialism and innovation; 4) the extent to which they are learning organizations; and 5) their resourcefulness and ability to "make do" with the resources they have access to.

The survey results demonstrated that organizations that had 1) healthy workplace culture; 2) a higher degree of entrepreneurialism and innovation; and 3) an organizational focus on learning and growing perceived themselves as having a higher impact in achieving their desired outcomes. We also found that all three factors were stronger in organizations that showed more resourcefulness.

Factors Leading to Impact

These findings align with research on changemaking in complex systems. In the current context of complexity, organizations are compelled to navigate in unknown and constantly changing conditions, and are interdependent in ways that require major shifts in mindset. This reality requires the ability to learn and adapt to new information (learning organization), the ability to take that information and come up with new and creative ideas and then try them out and be willing to let them go when they don't work (innovation), to be able to build a strong and resilient team that can stay together through unexpected situations (healthy work culture), and to be able to make do with resources that are available, and even expand what they understand to be a resource (resourcefulness).

Learning Organizations

We asked survey participants to rank their organizations on a scale of 1-7 on a series of 13 statements designed to assess the extent to which they perceived their organization as nurturing learning and growth. There was a positive correlation between the degree to which respondents felt their organizations nurtured learning, and their perception of their social impact. This finding is reflected in the literature about learning organizations.

The concept of a learning organization is a complex one that includes a range of mindsets, actions, and processes that promote evaluation and adapting to new information; supporting the development and capacity building of staff and stakeholders; an appreciation of feedback at all levels and from all directions; and creating an environment in which failure is seen as a means of learning and growing. Another important element of learning organizations is that learning must be modeled by those in leadership. The 2018 Ontario Nonprofit Network report called *Achieving Greater Impact by Starting with Learning* offers a range of definitions of learning organizations in Appendix A of the report. One that I found particularly helpful was from the Office of Planning, Research and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services. They describe learning organizations as follows:

> "A culture of continuous improvement is generally synonymous with learning culture or continuous inquiry. The term "continuous" suggests a cycle or a feedback loop that repeatedly challenges individuals to consider what is working and what can be done differently to improve or achieve better results. This process of inquiry is continuous rather than episodic. Individuals in continuous improvement cultures are always asking questions and seeking answers to those questions. Organizations actively pursuing a culture of continuous improvement create a safe space for staff and stakeholders to ask, reflect, and think more creatively about solutions. Foremost, the organization must cultivate a sense of trust throughout the agency. Those in executive and management roles must model a curious yet humble spirit." (Ontario Nonprofit Network, 2018, p. 28)

As explained by Smith Milway and Saxton (2011), an organizational focus on learning and evaluation is extremely important for developmental evaluation purposes, to ensure that organizations learn from their past experiences, both successes and failures, as well as from the past successes of others. They explain that learning is a key aspect of having impact on social issues, and not just "reinventing the wheel."

At the same time, the importance of being a learning organization goes well beyond external social impact, to also reflect many of the practices and principles that are necessary for any attempt to decolonize or integrate Justice, Equity, Diversity and Inclusion (JEDI) principles. It is about recognizing we often don't know what we are doing in complex situations, and being willing to learn from mistakes with the humility to make changes based on feedback. As Antoine et al (2018, p. 34) discuss in their writing on indigenizing learning, learning from mistakes is a fundamental aspect of Indigenous pedagogy, through the emphasis on experiential learning and self-development. Not only can an organizational emphasis on learning from mistakes create a culturally safer organization for everyone, but it is essential for an organization's capacity to navigate the challenges inherent in JEDI work.

> "Indigenous communities and families have a cultural process for "fixing" a mistake by creating a safe place to acknowledge your mistake, to fix it, and then learn from it. This

process isn't about shaming or belittling the individuals, but rather it is intended to raise them up and raise the people up who may have been affected by a mistake. After the process of acknowledging and fixing a mistake, it's then time to let go, move forward, and continue to work together." (Antoine et al., 2018, p. 34)

Some of the core competencies of a learning organization that I identified from the literature are as follows.

A learning organization:
- Doesn't get stuck in a focus on "best practices," but constantly evaluates to figure out what the current most promising approaches are for its context
- Understands what social change is and how it happens, and has a sense of purpose and theory of change
- Is committed to developing practical approaches, strategies and methods
- Has a culture of giving and receiving feedback, and is committed to creating the safety to do so
- Builds good support systems and procedures that include ways of overcoming conflict and sharing different perspectives (Britton, 2012)
- Integrates learning into the habits and routines of the organization, and invites and rewards opportunities to learn and grow
- Has clear goals about what people want to learn and why that is important
- Asks deep questions, including about its own values and assumptions
- Is ready to alter practices based on what is learned
- Engages partners in the learning process
- Has leadership that exemplifies and models organizational learning, and makes space for learning to happen (Ontario Nonprofit Network, 2018)

Britton (2012, pp. 23–24) offers a list of priorities for learning to become a learning organization. First, organizations need to develop a clear purpose and a theory of change. Second, it is important that there be a strong understanding of social change and how it happens in the context of complexity. Third, it is important that organizations develop practical strategies and processes to adapt and to make change happen. Fourth, in order to do this, organizations need to help everyone get better at giving and receiving feedback, and be able to see mistakes as an opportunity to learn and grow. Fifth, organizations that are successful around learning from mistakes, need to build good support systems, procedures, and opportunities to support people's learning and growing and adapting. Sixth, a major aspect of that learning needs to be around developing the capacity to innovate and design new options. Seventh, organizations need to get skilled at overcoming conflict, in order to have the resilience in the face of controversy and challenge, and to strengthen honest and caring relationships. Eighth, organizations need to prioritize building authentic and inclusive community, both internally and with outside stakeholders. Finally, organizations need to recognize the importance of recognizing staff as whole beings that need health in both their work and the rest of their lives to be able to think expansively and creatively, and reflect and learn from their experiences.

In this way, the concept of a learning organization is a holistic mindset and set of principles that encompasses all of the following principles connected to this Theory of Change.

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Healthy Organizational Culture

We asked survey participants to rank their organizations on a scale of 1-7 on a series of 12 statements designed to assess how they perceived their organization's workplace culture and wellbeing. There was a positive correlation between the degree to which respondents felt their organizations had a strong/healthy workplace culture, and their perception of their social impact.

In developing the statements for this question, as well as for the analysis, I relied heavily on the principles of workplace psychological health and safety, as defined by the Mental Health Commission of Canada's *National Standard of Canada for Psychological Health and Safety in the Workplace* (2013). The National Standard lists 13 evidence-based psychosocial factors of a healthy workplace (definitions from *National Standard of Canada for Psychological Health and Safety in the Workplace: Video Facilitator's Guide*, 2017 pp.7-20):

- **Organizational Culture:** the extent to which an organization's culture is characterized by trust, respect and honesty
- **Psychological and Social Support:** present when "coworkers and supervisors are supportive of employees' psychological and mental health concerns and respond appropriately as needed"
- **Clear Leadership and Expectations:** leadership is effective, meaning that employees "know what they need to do, how their work contributes to the organization and whether there are impending changes."
- **Civility and Respect:** exists in a workplace in which "employees are respectful and considerate in their interactions with one another, as well as with customers, clients, and the public."
- **Psychological Demands:** an organization has realistic psychological demands when "there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold."
- **Growth and Development:** employees are supported and encouraged to develop their job-related skills, including interpersonal and emotional
- **Recognition and Reward:** employees are appropriately recognized for their efforts and accomplishments
- **Involvement and Influence:** employees have the capacity to participate in discussions about their work, and impact important decisions that affect them
- **Workload Management:** "tasks and responsibilities can be accomplished successfully within the time available."
- **Engagement:** "employees feel connected to their work and are motivated to do their job well."
- **Balance:** the workplace recognizes that all employees need to be able to balance demands of their work with family and personal life.
- **Psychological Protection:** "workers feel able to safely ask questions, seek feedback, report mistakes and problems, or propose a new idea without fearing negative consequences to themselves, their jobs or their careers."
- **Protection of Physical Safety:** employees feel confident that employers demonstrate ongoing concern about employees' physical safety, and quickly address any potential threats.

I chose this as a framework for healthy workplaces because of the robust research that went into developing the Standard, as well as the fact that there are substantial resources available to support organizations to make the necessary changes. The Standard is furthermore inclusive of many of the principles we identified as core to the CSCNS's values. For example, the principles and practices that are fundamental to implementation of JEDI within organizations are integrated throughout the 13 factors.

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Particularly if integrated with an understanding of systems and an adoption of practices and principles of learning organizations, the Standard offers very tangible and accessible tools for creating more inclusive organizations that are committed to decolonization and justice on the inside as well as outside.

As creating a healthy workplace culture involves complex organizational systems change, many of the required core competencies for healthy workplaces fall initially to leadership, although there are many aspects of healthy workplace culture that staff is responsible for as well. (*Psychologically Safe Leader Assessment*, n.d.). In particular, creating a psychologically healthy workplace relies heavily on **relational leadership skills**. For example, leadership needs to be able to **communicate** clearly about job expectations, and to **collaborate** with employees to support their success. Leaders also need to be able to **model inclusion and respect** for all people in the workplace, particularly equity-seeking groups, creating a culture of engagement and respect for everyone. Leaders also need to build their own **problem solving** and **conflict management** capacity, so they can support others to do the same, as well as their **capacity to respond quickly** to any potential threats to employee safety. And finally, leaders need to develop their capacity to **make decisions with fairness and integrity** with recognition of their own limitations and biases.

As for the organization as a whole, it is important for everyone to understand and commit to the principles of psychologically safe workplaces, and to develop the necessary skills and mindsets to create environments of care and support, including effective communication and conflict resolution, equity and inclusion and understanding bias, giving and receiving feedback, managing workload and work/life balance, identifying and addressing potential risks to safety, and generally being a constructive member of a team. (Group, 2013, Annex p19)

System-Oriented Entrepreneurialism and Innovation

We asked survey participants to rank their organizations on a scale of 1-7 on a series of 6 statements designed to assess the extent to which they perceived their organization as having entrepreneurial tendencies. There was a positive correlation between the degree to which respondents felt their organizations had entrepreneurial tendencies, and their perception of their social impact.

As I was going through literature about entrepreneurialism and innovation, the articles reflecting on core competencies for entrepreneurialism and innovation in the realm of social problems highlight that these core competencies need to go beyond standard design thinking or basic business principles of entrepreneurship and innovation to include: 1) a robust understanding of systems and the kinds of barriers that systemic issues present; 2) the need to collaborate and seek diverse perspectives and capacities for impact; and 3) a connected emphasis on advocacy, regulation, and policy approaches. For this reason, we expanded this outcome to include a systems orientation. As Conway et. al. explain,

> "Great design doesn't always generate impact. As we show in this report, innovations attempting to scale and create systemic change often hit barriers to change, sending them catapulting back to square one. We call this the 'system immune response'. The particular barriers will differ dependent on context, but might be cultural, regulatory, personality-driven or otherwise. This report argues that innovations for the public good are susceptible to the system immune response because there is a deficit of systems thinking in design methodologies." (Conway et al., 2017, p. 3)

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In relation to core competencies for socially engaged entrepreneurialism and innovation, Waychal (2016), laid out a framework for supporting people to develop these competencies. He identified the following competencies that can support people to innovate: 1) **fresh thinking or creativity**, meaning generating a range of quality ideas and choosing the best ones; 2) **value delivery**, meaning developing and deploying effective strategies to meet objectives; 3) **visioning,** or creating a vision to tackle real-world challenges they are passionate about; 4) **decision-making,** meaning using clear and adaptive methods for choosing ideas and moving them forward; 5) **networking and collaboration**, meaning random diverse teams working collaboratively, with recognition that diversity enhances innovation due to "simultaneous thinking in multiple boxes"; 6) **stretch mindset**; and 7) **design thinking and action**, meaning identifying possible routes to change, trying things out, testing those efforts, integrating the feedback, and trying again**.**

Conway et. al. (2017, p. 14) add two additional core competencies that are essential for design thinking and innovation around "wicked" social problems. The first is **systems thinking and analysis,** meaning the capacity to hold sophisticated theories of change and understandings of power and systems. As part of systems thinking, it is important to have a holistic view that can see multiple factors and how they interrelate. This capacity maximizes the possibility that an innovation will be able to navigate systemic obstacles to change and lead to scaling up impact. Second, they talk about a **hacker mindset,** that asks the question: What can be done now to maximize the likelihood of success in the future? As they explain,

> "Thinking like a system here will include problem analysis (for who? By who/with who? How? As part of what?); understanding stakeholders and power (including who makes decisions, controls resources – including those that can be leveraged, holds blocking cards or might not want the competition to succeed?); considering problems that overlap; and, crucially, thinking hard about why this problem has not been solved already." (Conway et al., 2017, p. 23)

Resourcefulness

We asked survey participants to rank their organizations on a scale of 1-7 on a series of five statements designed to assess the extent to which they perceived their organization as being resourceful. While resourcefulness didn't correlate directly with impact, there was a positive correlation between the degree to which respondents felt their organizations were resourceful, and the degrees to which they felt their organization was a learning organization, demonstrated entrepreneurial tendencies, and had a strong workplace culture.

Organizational resourcefulness is described as the ability to access all of the different kinds of resources that are available. There are many kinds of resources including financial or material, human, natural, institutional, symbolic (for example being values-driven), and social resources (Akingbola, 2013). Organizations that have high resourcefulness are able to identify a wide range of possible resources, and creative ways to make use of them and even expand them. For example, financial or material resources may include the actual money available, but it can also include items that are donated, and even reusing or upcycling things that might be considered waste by someone else, for example, making use of fabric waste from the fashion industry for social enterprise (Barraket et al., 2019, p. 11).

An important core competency of resourcefulness is the concept of bricolage, which is a process of creating something where there was nothing before.

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> "Bricolage has been used to explain the process through which individuals acquire, accumulate, and combine available resources and deploy whatever strategies are required to achieve different ends, and/or to adapt to existing situations" (Akingbola, 2013, pp. 67–68)

Many of the sources I reviewed discussed that the most important part of resourcefulness in resource-limited contexts is the idea of **network bricolage**, which is the "making do" that can be possible through collaboration and partnership. The major benefits of building collaborative networks is that large numbers of different stakeholders come together and combine existing resources and skills to create the impact they want to see (McKague et al., n.d., p. 16). This creates an expanding capacity not only to access all kinds of available resource, but even to create new ones. For example, unlike financial resources, social and institutional resources – or the relationships and networks that build through collaboration – actually become more valuable and even increase when used. They also increase access to other more finite kinds of resources, for example donations and available volunteer labour.

There are a number of core competencies and ways of thinking connected to resourcefulness and bricolage that are also very relevant for entrepreneurialism and healthy workplace culture, particularly in the ways they can challenge scarcity mindset (Akingbola, 2013; Barraket et al., 2019). For example, the primary competencies are having the **capacity to make do with what is**, and being able to make a creative assessment of what is available to **see things, relationships, and knowledge as resources**. There is also the capacity to **creatively combine existing resources** to come up with new possibilities.

Mindsets that exemplify resourcefulness include: feeling **unconstrained by limitations** and having a **willingness to improvise**; **recognizing some resources grow by being used** (like social capital and symbolic resources); and **recognizing that organizations can be and can offer resources for each other**.

Given that building networks and collaboration is such an important part of resourcefulness, the following are some additional core competencies and behaviours for network bricolage (McKague et al., n.d., pp. 23–35).
- Being able to find the actions and solutions that fit the local context, and doing what's possible within the context
- Creating incentives for involvement that match with network members' interests and concerns
- Developing transparent governance processes and decentralized decision making to engage more local participation and increase agency
- Building collaboration and partnerships and network building based in trust and relationships.

As Barraket et. al. found in their research in resource-constrained contexts (2019 p.4),

> "[N]etworks predicated on high degrees of personalised trust (or, bonding social capital) played a significant role in supporting community subsistence, while networks based on 'weak ties' (Granovetter, 1973) and generalized trust – or bridging social capital – were important in enabling community access to diverse resources needed to 'get ahead' in globalising economies (Onyx and Leonard, 2010). A small vein of research has further identified that linking social capital – or networks that bridge institutional divisions (including geographic and social distance between communities and institutional power) is particularly important in enabling effective endogenous development."

Collaboration and Leadership

I hosted a brainstorming and mapping session with CSCNS staff to flesh out what short and medium-term outcomes are necessary to achieve the long-term outcomes described above, and then I continued to expand the mapping based on my research. As I continued to build out the map (see image below), it became clear that two additional core focus areas need to be considered in building sector impact:

1. Network building, collaboration, and partnership development as a core element, beyond what was already discussed in relation to resourcefulness
2. The development of strong and dispersed positional, informal, and emergent leadership in the sector.

Network building will be discussed more in the sections on Pedagogical Principles and the Learning Plan.

Developing Strong and Dispersed Leadership

In developing my thoughts around leadership, I started from a framework laid out in the Ontario Nonprofit Network's report called *Leading Our Future: Leadership Competencies in Ontario's Nonprofit Sector* (Clutterbuck & Arundel, 2017). They based their framework on a scan of leadership literature, as well as research with nonprofit stakeholders in Ontario. The ONN framework describes core leadership roles as the following (Clutterbuck & Arundel, 2017, p. 28-31):

- **Builder:** frames organizational vision, mission and values; develops a strong, diverse, and adaptive org; builds relationships externally; develops the organization's capacity for community impact
- **Thinker:** understand complex internal and external dynamics; anticipates change; assimilates and assesses data; analyzes situations; creates strategies; has an ongoing commitment to personal growth; contributes to knowledge generation
- **Mentor**: nurtures and supports growth of staff, volunteers, and other organizational stakeholders; models relational and caring leadership; creates a climate of trust; reflects consistency and authenticity to external actors; perseveres through complexity and ambiguity
- **Storyteller**: champions the mission and goals of of the organization; communicates value and impact; establishes a clear organizational image; speaks authentically with a strong voice
- **Innovator**: encourages curiosity; takes risks to create new possibilities; celebrates and learns from success and failure; acts strategically; adapts and adjusts to changing conditions
- **Connector**: invests in relationships, networks, and partnerships; collaborates with stakeholders; negotiates to resolve conflict; brings community knowledge to connect stakeholders; listens for diverse voices
- **Steward**: directs use of resources; manages performance; introduces technical and management practices to strengthen capacity; plans organizational development; demonstrates accountability; supports transparency and effectiveness in governance

The authors of the report recognize that some of these roles are more important than others, depending on an organization's stage of development. They also discuss that these roles are often not all held by one person as the sector moves more toward shared leadership.

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When thinking about supporting leadership development from a decolonized lens, it becomes even more important to support and develop leadership as a broad role that is not only represented by formal positions. As Kenny and Fraser discuss, an Indigenous approach to leadership is earned through relationships and gaining respect over time, and influential leaders are not always the ones in formal and visible positions of power (Kenny & Fraser, 2012, p. 5). Leadership is dispersed and interconnected. People step into leadership because they have capacities that are needed in that moment, and might step out again when something new is needed in coherence with the "flow and flux of changing circumstances" (Kenny & Fraser, 2012, p. 7). Such a dispersed and relational approach, adopted in the community sector, would support the development of leadership capacity in broader, more inclusive, and more sustained ways that would support succession, strengthen relationships, and increase the sector's capacity for impact.

Theory of Change

The Likert results from the survey combined with relevant literature informed our Theory of Change. We started with the following impact statement for the projected work of the Educate and Innovate pillar of the CSCNS:

Nova Scotia community sector organizations are able to nurture learning and are equipped to adapt to changing contexts so they can create positive impact for all Nova Scotians.

We defined the long-term outcomes in order to achieve this impact as the following:
1. System-oriented entrepreneurialism and innovation (courage)
2. Healthy culture and relationships (trust)
3. Resourcefulness with available resources, and sharing within networks (abundance)

These outcomes would need to be supported by network building and collaboration, and with support for strong and dispersed leadership.

Definitions of Key Elements

The following are short descriptions of the key elements of the suggested Theory of Change.

Learning Organizations: Organizational cultures and mindsets of learning, reflection, and growth, through continuous inquiry about what is working well (with celebration), what could be done differently, and how we can learn from successes and mistakes (with support). All members of the organization are encouraged and supported to learn and develop, acknowledge what they don't know, creatively explore areas of interest, and seek out new solutions to complex problems. Leadership models humility and willingness to change, and creates the necessary safety for everyone in the organization to do the same.

Healthy Organizational Culture: All members of an organization feel safe, respected, and cared for, and are committed to develop the necessary skills, mindsets, and processes to create environments of care and support. Leadership takes responsibility for identifying barriers to organizational health, and making the necessary organizational system changes to remove those barriers. Staff are supported to develop their capacity for effective communication, conflict resolution, and feedback; and are included in decisions and engaged in their workplace. Work/life balance and mental and physical health are

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prioritized. Justice, equity, diversity, and inclusion is integrated at all levels, and people have confidence that their physical and psychological wellbeing will be protected.

System-Oriented Entrepreneurialism and Innovation: Development of capacity for creative thinking, experimentation, and innovation and the related mindsets that support strategic thinking and risk taking. A combination of design thinking with an understanding of systems and the kinds of barriers that systemic issues present. This includes the skills needed to collaborate and seek diverse perspectives, for purposes of transforming systemic and organizational issues that are beyond the capacity of a single organization.

Resourcefulness and Networks: The ability to identify a wide range of possible resources, and creative ways to make use of them and even expand them. Resourcefulness includes the capacity to build networks in ways that increase the resources available to everyone involved.   Resourceful organizations and networks have the capacity to make do with what is, and are able to creatively assess things, relationships, and knowledge as resources.

Strong and Dispersed Leadership: Leadership in its broadest sense is a set of skills and ways of thinking and doing that provide guidance, support, and stewardship to organizations, networks, and the sector to thrive and achieve desired impact. Leadership often resides in positions of formal authority, but is also most effective when dispersed more broadly and inclusively. Leadership is an essential ingredient of all of the key elements of this Theory of Change, and is especially important for collaboration for greater impact on systems. Effective leadership includes a range of skillsets and mental models, including: capacity for governance and strategy; capacity for systems thinking and innovation; ability to grow, navigate, and nurture external relationships and collaborations; relational leadership skills; and the capacity to strengthen and steward an organization, both in terms of operations and in terms of culture.

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Graph: Theory of Change

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What We Heard

Obstacles and Innovation in the Sector

In both the Open Forum and the survey we asked participants to talk about the obstacles they are facing in the sector. Very consistently, funding was mentioned as the main obstacle organizations are facing.

> *"Our core provincial funding has not changed in 5 years, yet the demand and gravity of requests for aid we receive has ratcheted, especially in this pandemic year. We cannot expand our services as needed, as there is no funding to do so. My staff is brilliant and engaged, but they are struggling. There is so much to do and so little support for them as they work as many hours as possible and give so much." - Survey*

Top 3 External Challenges

Challenge	Percentage
Funding Models 84/147	57.14%
Increasing Complexity of Problems 69/147	46.94%
Global Events (e.g. COVID, climate change) 56/147	38.10%

Top 3 Internal Challenges

Challenge	Percentage
Fundraising and Funding Diversification 53/147	36.05%
Workload and Burnout 44/147	29.93%
Expanding Program and Service Delivery 35/147	23.81%
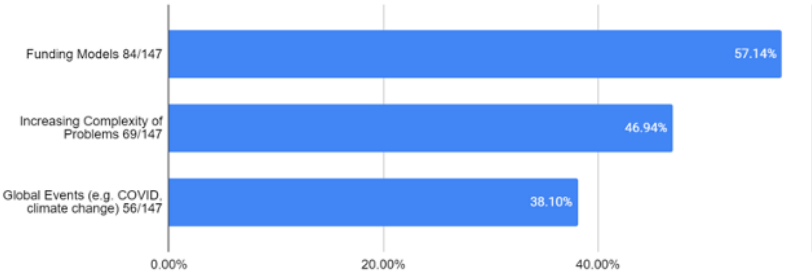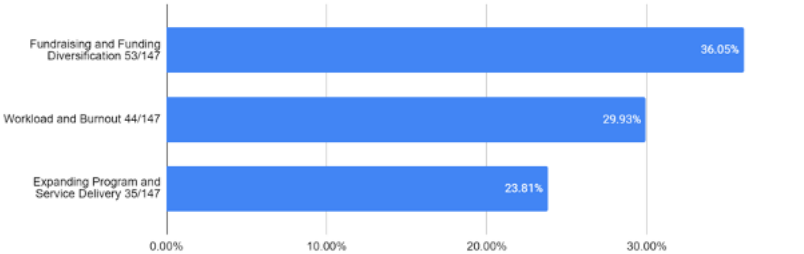
CSCNS's COVID-19 survey showed a similar result, and in fact suggests that funding problems have been made worse by the pandemic.

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"Recent analysis of this funding by the granting organizations shows that they distributed almost $5M but that qualified requests for this funding exceeded the amount available by 75%. Additionally, 73% of organizations in the sector did not apply at all because they were not a registered charity or did not have the capacity to write an application." (Community Sector Council, 2020, p. 14)

With COVID there has increased workplace stress (which was the second most named internal challenge), an increase in demand for services as the pandemic continues, higher costs and lower revenues, and threats of closure for organizations whose operations have had to be put on hold, such as arts and culture and sports (Community Sector Council, 2020, p. 3)

At the same time, nonprofit organizations in the province are showing a huge amount of resilience and desire to innovate in spite of these obstacles. In particular, in the COVID-19 study that CSCNS produced in December 2020, the development of partnerships and innovation increased from 10% of orgs to 40% of orgs between April and October 2020. The data demonstrated that organizations, particularly in the areas of food and social inclusion, created new partnerships and strengthened existing partnerships, both between organizations and funders, and between organizations with resources to share with organizations that were struggling. These partnerships have helped the nonprofit sector innovate to serve community needs more effectively (Community Sector Council, 2020, p. 15). These findings from the COVID-19 survey matched our findings from the open forum and focus groups conducted for this research, in which participants recognized the importance of collaboration, and placed a major emphasis on the need to build capacity and skills for effective partnership and collaboration between organizations, as well as with funders, government, public sector, and the private sector.

"[When you have multiple organizations working on, for example] employment support, they should all be working together, but they hold onto the opportunities. Maybe they have different approaches, but there are also incentives as part of funding contracts, which leads to competition. To reach stretch goals they have to compete with who they should collaborate with. – Open Forum participant

"CSC can act as a matchmaker between funders and organizations and between organizations. If there are two organizations doing the same thing but might not be connected, maybe there could be a way for organizations looking to collaborate to connect…. There could be matching with for profit as well. It would improve efficiency, matchmaking, community sharing, electronic bulletin board." – Open Forum participant

Capacity building needs in the sector

I grouped common themes that came up in the survey and the focus groups into five overarching themes: 1) Leadership skills for running and organization; 2) Staff skills; 3) Psychological Safety; 4) Organizational Sustainability; and 5) Complexity and Impacting Systems. Quotes demonstrating the themes are integrated into each theme. More quotes can be found in Appendix 2: Capacity Building Quotes

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I have identified the most important themes by labeling them "KEY" in the headings for each section. I determined most important based on 1) the number of times a sub-theme came up, 2) feedback from prototype sessions, and 3) how central they are in relation to the overall desired impact in the theory of change.

1) Leadership skills for running an organization

This theme that came up in the research around leadership related primarily to the ONN Leadership Report's (Clutterbuck & Arundel, 2017) description of leaders as Mentors and Stewards. Other aspects of this leadership framework showed up in comments around innovation, collaboration, and healthy workplaces.

This section includes capacity building themes around **Human Resources Management**, **Relational Leadership**, **Operations**, **Planning and Prioritizing**, and **Governance Skills**. There was a recognition among research participants that there is a need to support emerging leaders to develop both basic and more advanced leadership skills, particularly for those who have not had access to leadership or management training.

> *"We need to have opportunities for great frontline worker training around leadership development. Things like how to be a good leader rather than manager, conflict resolution, frontline work, working with colleagues effectively, strategic plans, budgets, financial management, relationship building, and so on. Not everyone who might be moving up into leadership knows how to do that." – Focus Group participant*

KEY: Human Resource Management and Relational Leadership

A large number of survey respondents, as well as several focus group participants, recognized that Human Resources is an area of growth for many organizations, particularly around 1) policy and process development, 2) addressing staff behaviour, and 3) staff recruitment, retention, and advancement.

> *"We are facing an opportunity to grow our staff and impact. Having more resources in regards to Human Resource Management is something we are lacking." - Survey*

> *"HR training: how to hire, offer letters, retain, keep employees engaged, feedback, difficult conversations." – Focus group participant*

> *"Changing policies and procedures in an ever fluid landscape." – Survey*

Under the subtheme of Relational Leadership, research participants stated needs including: managing the complexities of the role of a leader, relationship building, shifting from managing to leading, and supporting a team doing emotionally difficult work.

> *"Leaders have to be trained in how to connect with people in ways that are real, for example how to manage people, performance measurements, and people management." – Focus Group participant*

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"We need group dynamics training. Group dynamics stops governance from going well." – *Focus group participant*

"Leading staff who are managing stress, anxiety while also trying to lead an organization" – *Open Forum participant*

One of the biggest themes that came out of all research methods was the need for leadership to develop their capacity to support staff to maintain work-life balance and prevent burnout (more on this in the section on psychological safety).

KEY: Operations

Participants mentioned a range of operational capacities where they felt training would be helpful, including: **Financial Management**, **Business Skills**, and **Project Management**.

"Not all nonprofits have funding to hire CPAs so often the people responsible for budgeting and accounting don't necessarily have all the knowledge that would be helpful, and not all EDs come in with business backgrounds, so most are learning on the fly how to manage and do budgets and how to project three to five years." – *Focus Group participant*

"[We need] project management systems such that at any time, any one of us can quickly get up to speed on a particular project and know when it is going well and what is challenged." – *Survey*

"There must be great project management tools/styles that we can draw on instead of re-inventing the wheel." – *Survey*

KEY: Planning and Prioritizing

Planning and prioritizing was one of the most frequently named leadership competencies in need of development.

Below are the top two responses based on percentages that gave a 6 or 7 to the question: "In regards to program and service delivery, how beneficial would it be to have training opportunities in the following areas on a scale of 1-7?"

Strategic planning and activity planning	58/108	53.7%
Piloting/prototyping ideas (how to pilot projects to create the case for new policies or programming) – Also relevant to innovation in Complexity theme	51/108	47.2%

"So many nonprofits are trying to do everything. We need to get clear on what we can do, and what we need to say no to. And also learning what others are doing and syncing up with each other. We need to prioritize and do an impact assess from resource perspective, in relation to community need. We are trying to do so many things and it feels like we are doing nothing really well. We need to get clear on that from an ED perspective, and give clear direction to staff. It's about being mission driven rather than doing whatever comes along." – *Focus Group participant*

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"The organization needs stronger, firmer leadership in order to get things done more efficiently and have a clear direction. I think the organization ends up wasting time and funds without accomplishing that much at times. There also needs to be more emphasis on communications, as most people are unaware of the organization." – Survey

"Infrastructure development, governance and putting in place processes and policies needed to sustain the organization." – Survey

RECOMMENDATION: Based on survey responses around prototyping, comments about the difficulties planning for unknown futures, and the TOC focus on systems-oriented innovation, I would strongly recommend that any training around strategic or program planning be done within an adaptive/scenario planning framework.

KEY: Governance

Governance issues around board and staff relationships, clarifying roles, and the difficulties of managing with volunteer boards came up a number of times in the survey and the Open Forum, but was only a small part of the focus group data. That being said, governance is fundamentally linked to all of the other leadership competencies that did come up as priorities.

"[What are the] roles and responsibilities for the ED, review of bylaws or board manual, executive limitations and what the ED can do on their own and what they need to bring to the board, how do I behave as chair and how do I behave as ED?" – Focus group participant

"Worried about leaving, because board is so dependent" – Open Forum participant

"Board is full of strong leaders but new to working in a governance role, quick to make decisions" – Open Forum participant

2) Staff skills

This theme included capacity building around **Virtual Skills**, **Program Delivery**, **Communications**, and **Basic Job Skills**.

KEY: Virtual Skills

Respondents suggested a number of areas where it would be helpful to have training in working virtually. These included: **systems for remote work** such as file organization, **team collaboration tools**, and **virtual staff management**; how to build **team relationships and teamwork in a virtual context**; and **facilitating and engaging community through online tools**.

"Engaging online educational games and social activities for marginalized learners" - Survey

Below is the top response based on percentages that gave a 6 or 7 to the question: "In regards to facilitation and hosting, how beneficial would it be to have training opportunities in the following areas on a scale of 1-7?"

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Engaging community through online tools	59/108	54.6%

Respondents also talked about the challenges of **shifting to a virtual workplace**, and the need for new ways of managing communication and maintaining relationships.

> *"Managing our files, eg dropbox is a challenge, keeping up with all communication in a timely way is a challenge. need a good system for maintaining electronic files." – Survey*

> *"How to maintain relationships virtually. You know, the watercooler moments and collaboration and teambuilding." – Focus group participant*

This last point is also very relevant for healthy workplaces, as the quality of workplace relationships has a huge impact on people's feelings of wellbeing in the workplace.

Program Delivery

A number of participants talked about the need for program specific training, particularly around **mental health and trauma-informed care**, and around **understanding the particular needs of the groups they serve** (seniors, people with mental health conditions, BIPOC communities, etc).

> *"There's an increase in participants coming with mental illness rather than physical disability. Training around that would be helpful. Something more in-depth than mental health first aid. We need to understand various mental illnesses that people are presenting with to really understand how to help them." – Focus group data*

> *"If we paid more attention to social determinants of health and had that as an orientation for board and staff, it would be a contextual piece that helps our understanding. There are more likely to be people who have other stresses in their life. It would be an orientation to context around the work of individual organizations to talk about experiences of marginalized people in context." – Focus group participant*

While this came up a number of times, there was not a clear priority in terms of topic, and it also doesn't seem like the piece that it makes the most sense for CSCNS to take on given your mandate. This might be more an area to partner around and promote other organizations' capacity building opportunities.

3) Psychological Safety

This theme included capacity building around **Decolonization, Justice, Equity, Diversity, and Inclusion**; **Burnout, Workload, and Mental Health**; and **Creating a Healthy Workplace**.

The following graph represents the top three choices survey respondents chose when asked what aspects of workplace culture they would like to become better equipped to address.

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What aspects of workplace culture would you like to become better equipped to address? Please select up to 3 options.

28.77%

32.88%

30.82%

- Managing workload and burnout (48/146)
- Mental health in the workplace (45/146)
- Creating inclusive workplace culture (42/146)
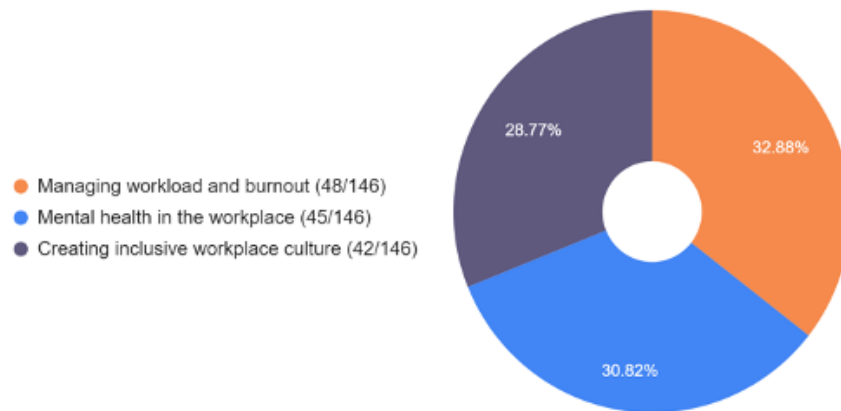
KEY: Justice, Equity, Diversity and Inclusion (JEDI)

Practices to integrate Justice, Equity, Diversity and Inclusion (JEDI) into the "organizational DNA" as one participant put it, were recognized as one of the most important learning areas where they could use support. Some participants expressed a lack of knowledge about what JEDI means. However, many participants had an understanding of theory, but found it challenging to implement in practice. Some of the learning needs that people expressed were:

- Organizational decolonization and implementation of the TRC Calls to Action
- Developing committees to support JEDI implementation
- Developing internal policy around JEDI principles
- Diversifying staff and board in non-tokenistic ways
- Creating an equitable and inclusive workplace culture
- Increasing diversity across all levels of the organization
- Finding diverse suppliers for contracts and services
- Making sure that everyone is on board with JEDI principles
- Working with leadership that is resistant to integrating JEDI

"My experience is I don't know how to bring diverse voices to table in a way that's not tokenism. For staff recruitment, I'm not sure how to find people and give them the opportunity. I've heard people say it's just giving people a chance, and I love that thinking but don't know where to start. I would love practical ideas and supports on how to do that."
– Focus Group participant

"DEI is so important. People are starting to recognize that but few have the capacity to implement and action that knowledge. We need learning and training and support around that. We can't just have a session and send people off. Give people some tools and

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supports, because there's great desire but very complicated so how do we accommodate that?" – Focus Group participant

"Our organization is not being proactive in relation to justice, equity, diversity, and inclusion. I'm not sure how to influence this change." – Survey

"How do we develop a committee around DEI? It would be good to have something around the topic but more around what are actions people have taken for small organizations. We have had some learning opportunities, but what are next steps to take it into community and as an organization?" – Focus group participant

In addition to JEDI being an important concern in relation to the workplace, a few people also mentioned the importance of integrating JEDI principles and practices into program delivery.

"Our biggest concern at the moment is adding in a diversity and equity lens. I specifically am working more in community building, and we don't have any existing relationships with underserved or historically marginalized communities." – Survey

"We would like to have a more diverse membership, access artists from more diverse communities and teach our membership how to build relationships with these underserved communities." – Survey

KEY: Burnout, Workload, and Mental Health

Survey respondents identified workload and burnout as the second largest internal organizational obstacle after funding, with 30% of respondents picking it as one of their top choices. In addition, it was the first choice response to the question: "What aspects of workplace vulture would you like to become better equipped to address?" with 33% of respondents picking it as one of their top three choices.

"As a union member I see other members (particularly young and new to their jobs) struggling to maintain healthy work /life balance. As frontline workers during a pandemic more could have been done by management to ensure that all staff are functioning adequately and performing self-care." - Survey

"Mental health support for staff. You can't give to others what you don't have. How do we take care of our people and give permission to people to take care of themselves? How do you support your team with emotionally tough work?" – Focus group participant

"It would be great for organizations to have an umbrella training about how to make culture shifts around mental health in the workplace." – Focus group participant
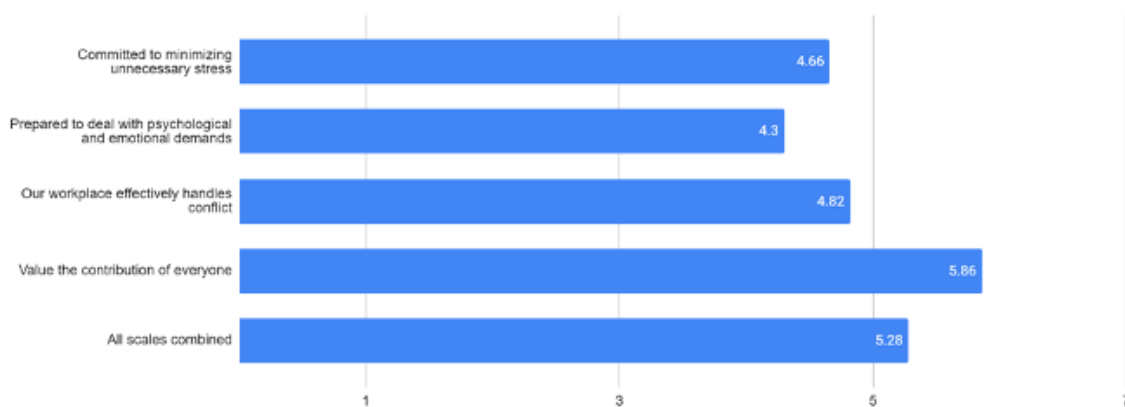
Following a very popular prototype series of sessions on burnout for EDs, participants gave the following feedback about how CSCNS can support them to support their team around burnout.

"Resources for our teams as well. How do we translate this learning to our teams? How do we translate this learning [about burnout] into practice?" – Evaluation from Burnout Series

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KEY: Creating a Healthy Workplace

While burnout, workload, and JEDI were the clearest priorities around creating a healthy workplace that came out in the qualitative data, there were a number of other factors that had lower ratings in the series of Likert questions about workplace culture and wellbeing. The overall weighted average for all questions combined was 5.28 out 7, and the highest weighted average was "We value the contribution of everyone in the workplace," at 5.86 out of 7.

Lowest three and highest one weighted average out of 7, compared with average of all scales.

Statement	Weighted Average
Committed to minimizing unnecessary stress	4.66
Prepared to deal with psychological and emotional demands	4.3
Our workplace effectively handles conflict	4.82
Value the contribution of everyone	5.86
All scales combined	5.28

Three Likert statements were rated at a weighted average under 5 on a scale of 7. They were:
1. Our workplace effectively handles conflict among employees – 4.82/7
2. My organization has prepared me to deal with the psychological and emotional demands of my job – 4.30/7
3. My workplace is committed to minimizing unnecessary stress at work – 4.66/7

The second and third statements can be considered to be directly related to experiences of burnout in the workplace. In addition, workplace conflict, which came up in qualitative survey results as well, can also be a major factor in both burnout and other workplace mental health concerns, particularly as they relate to psychological safety.

> *"Trying to ensure staff are supported and engaged in their work to the best of their ability."*
> *- Survey*

> *"Psychological safety. The majority of the time intentions are so good, but we need to understand power dynamics and more diverse workforce and understanding why a contracted employee might not want to speak out." – Focus group participant*

> *"Safe workplace training, like sexual harassment training but also more broad, and mental health in the workplace." – Focus group participant*

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"Effective communication is hard. Learning how to continually communicate effectively." –
Focus group participant

It is important to note that creating a psychologically healthy workplace relies heavily on **relational leadership skills**. For example, leadership needs to be able to **communicate** clearly about job expectations, and to **collaborate** with employees to support their success. Leaders also need to be able to **model inclusion and respect** for all people in the workplace, particularly equity-seeking groups, creating a culture of engagement and respect for everyone. Leaders also need to build their own **problem solving** and **conflict management** capacity, so they can support others to do the same, as well as their **capacity to respond quickly** to any potential threats to employee safety. And finally, leaders need to develop their capacity to **make decisions with fairness and integrity** with recognition of their own limitations and biases.

4) Organizational Sustainability

This theme included capacity building around **Evaluation**; **Reporting for Impact**; **Fundraising and Funding Relationships**; and **Sustainability including Succession Planning**.

KEY: Evaluation, Impact Assessment, and Reporting

Below are the top three responses based on percentages that gave a 6 or 7 to the question: "In regards to evaluation and impact assessment, how beneficial would it be to have training opportunities in the following areas on a scale of 1-7?"

Enhancing evaluation skills	55/110	50%
Effective sharing of research and evaluation outcomes	52/109	47.7%
Effective application of research and evaluation outcomes	52/110	47.3%

"Charities struggle because they don't know how to define their own impact. We exist because we exist and don't know how to question that. If we could have more understanding of how to define impact that would be great, for example here are our 5 impact points and what we do for society. We can't always articulate it to win more grants." – *Focus Group participant*

"How to do reporting and evaluation. How to demonstrate stories in a way to attract more funding, and show the impact of the work. Everyone's sick of surveys so how can we demonstrate impact? What are evaluation techniques that demonstrate impact?" – *Focus group participant*

"In order for us to report back, we have to gather info from the groups we work with, because we have to be accountable for the money. Lots of groups are having difficulty with capacity to understand the difference between outcomes and outputs, and reporting back data. In frontline running of programs, they have trouble seeing benefits to that. It's hard for them to understand value of the data I collect. But if I can report people have waitlists I can demonstrate need. I have to be able to demonstrate need to get money. People don't understand they need to give me the information I need to get them the resources they

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need. People are not utilizing services to help them gather data. They don't recognize the problem and are not looking for help." – Focus group participant

KEY: Fundraising and Funding Relationships

As previously mentioned, funding and fundraising were named as the top challenge organizations are facing, both internally and externally. Much of this challenge has to be approached from a systemic perspective, and overlaps with the work of Networking and Sector Services.

That being said, from a Capacity Building perspective, this challenge can be supported in a range of ways both internally and externally:

Internal: training and support for development of fundraising capacity including: grant writing, fund diversification, evaluation, and financial management and budgeting.

> *"We are very dependent on Government Grants and subsidies to operate and need to develop our own fundraising and revenue diversification to ensure sustainability in the long term." – Survey*

> *"Our core funding is secure but is not sufficient to cover costs. Grants make up much of the difference. We don't want to raise rates for service as our clientele is generally low income, so we need to diversify and add secure funding sources." - Survey*

> *"Digital fundraising and how to use email and social media to acquire donors." – Focus group participant*

External: training and support around advocacy and relationship building with funders and government. This topic will be discussed more in the section on Partnerships and Collaboration, as 49% of survey respondents and several focus group participants talked about the need to build capacity to strengthen relationships with funders and government, both for funding purposes, and also for system change effectiveness.

Sustainability and Succession Planning

The topic of succession planning did not come up frequently in the qualitative data, but is integrated throughout all of the comments about the importance of leadership development. A couple of additional quotes that relate specifically to succession planning are as follows.

> *"[We need] leadership development opportunities for succession planning." – Focus group participant*

> *"Career development and what have I learned and how can I grow with skills I have. People need professional support and HR skills. Training should be offered to staff by the proper person with HR skills through custom learning for employees." – Focus group participant*

5) Complexity and Impacting Systems

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This theme included capacity building around Advocacy; System Change; Partnerships and Collaboration; and Innovation and Adaptability

KEY - Partnerships and Collaboration

Partnerships and Collaboration was identified as a key issue of importance, both as an obstacle and as a goal, in the survey, Open Forum and focus groups. Respondents identified collaboration as essential to being able to meet large scale system change, both in terms of 1) their areas of impact (poverty, homelessness, mental health, etc), and also 2) funding models and organizational sustainability.

Below are the top four responses based on percentages that gave a 6 or 7 to the question: "In regards to relationship development, how beneficial would it be to have training opportunities in the following areas on a scale of 1-7?"

Developing relationships across shared focus areas	63/110	57.3%
Developing relationships with organizations in other cultural communities in the province	65/109	59.6%
Developing relationships with government and/or funders	65/110	49.1%
Coordinating information sharing across and between sectors	53/109	48.6%

Some people talked primarily about the problems they were having.

"Our attempts to collaborate with other service providers in the area are often a struggle due to limited professional capacity of other organizations or walls built and other organizations working within silos. This leads to staff within our organization feeling burnt out. We are also at a stage where demand and capacity push and pull back and forth. Demand is higher, but there isn't quite enough for new staff/programs yet." - Survey

Others offered very tangible examples of what would be helpful for them in building partnerships with other organizations.

"Communicating effectively in a way everyone will understand, and improving communication as a skill. There needs to be collaboration around turf issues. We need to identify what it means and how we can work together. Because communication around coordinating 140 agencies and 40 staff and board and identifying where and when people need to know things, that can become a project in and of itself." – Focus group participant

"We lead coalitions that collaborate to determine the priorities in the region. It's no good to meet every month and not do something concrete. We need leadership training to develop agenda skills, priorities for meetings, facilitation, how to be a good listener, and relationship building. When you lead a meeting, you can't do all the talking. We have coalition meetings, and it's important that everyone feels the meeting has merit or they won't keep coming. It's about working on goals and giving everyone time to have their say." – Focus group participant

"It's about how we define collaboration and partnership. We all strive to do it and know it creates better programs and opportunities, but we end up in a room together and get excited, but don't have a great partnership and collaboration framework to guide us as to

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next steps. What are definitions and parameters around collaboration? What is the best way to move forward? How could we best define it? Who does it, what does it look like, who is bringing what?" – Focus group participant

"There should be something in terms of partnership around nonprofits, like best practices around how to move forward. Maybe lists of things you need to consider. Sometimes we don't know what to ask, and it feels overwhelming to actually bring people in starting from zero. We need a guide to not have to start from zero." – Focus group participant

"We will collaborate with eight new partners this year and will make partnership plans, but we don't know what organizations exist. We don't always know who's out there we could partner with who aligns with our mission and vison. We could do more to fund research projects that would hit smaller nonprofits in the work they do, for example around trauma-informed care. How can we help those organizations grow?. How can you help us identify other partners? It would be great to have networking and sessions where we can hear from other organizations to be more aware of what's in our community. We want to hear about other organizations doing really good work." – Focus group participant

KEY – Communications and Advocacy

Below are the top two responses based on percentages that gave a 6 or 7 to the question: "In regards to external communications, how beneficial would it be to have training and learning opportunities in the following areas on a scale of 1-7?"

Advocacy and influencing policy decision-making	64/109	58.7%
Communicating activities and impact (this is also related to the themes of funding and reporting)	60/110	54.6%

A number of people had specific comments about the need for the sector to build capacity for advocacy for influencing both public opinion and also policy makers.

"We need to get over our political naivete. Most of us believe merit is enough, so the PM will pay attention and fund us because this is critical. We need to think about that he makes decisions based on what will get him re-elected. If you want to be an effective citizen, pay attention to political calculus. Merit isn't enough if it doesn't help me get re-elected." – Focus group participant

"Advocacy and how to effectively advocate with people we're working to help. For food security, it's a poverty issue, so how do we advocate with people around poverty and food security? It's about understanding the political shifts. People would agree making children fed is a priority but how do you make the politicians see it as a priority?"
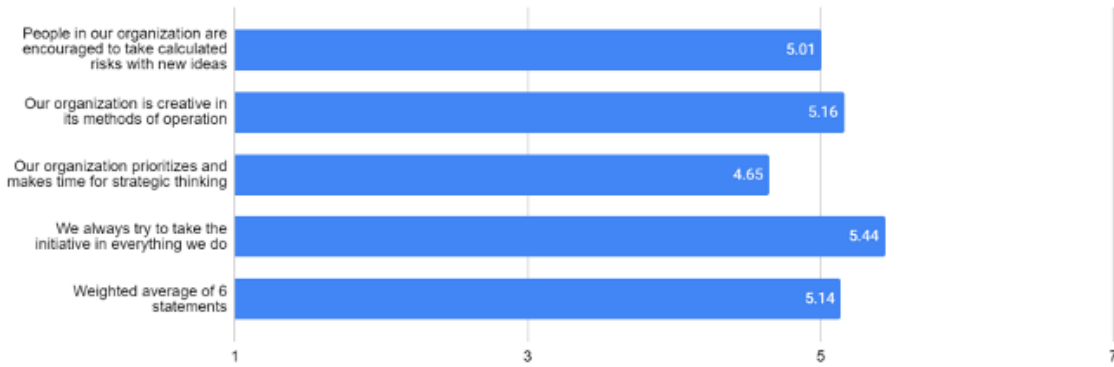
"Capacity building around advocacy: how might we all work together to advocate about the sector, build communications skills, public speaking, working with government, how to write a briefing, get your message out in three minutes, elevator speeches, getting government on side." – Focus group participant

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"How to change minds - prevent violence against woman, prevent MMIW and rape, poverty reduction, prevent racism and classism; being heard and respected." – Survey

KEY – Systems Change, Innovation, and Adaptability

This sub-theme came up in a range of ways throughout people's responses, in relation to systemic obstacles, and people's feelings of being stuck, or their recognition that it is important to find new ways of collaborating and planning. These themes are also related to the Likert scale findings around innovation and resourcefulness.

How your organization seeks and pursues opportunities on a scale of 1-7 (total of 6 statements)

Statement	Score
People in our organization are encouraged to take calculated risks with new ideas	5.01
Our organization is creative in its methods of operation	5.16
Our organization prioritizes and makes time for strategic thinking	4.65
We always try to take the initiative in everything we do	5.44
Weighted average of 6 statements	5.14

Resourcefulness of your organization on a scale of 1-7 (total of 7 statements)

Statement	Value
We feel confident that we will be able to access the resources necessary for our work	4.55
By combining our existing resources we take on a wide range of new challenges	5.01
We are confident we have or can find the resources we need to not have to cut corners on operational expenses	4.46
We see other organizations as collaborators with whom we can expand the scope of our resources	5.5
Weighted average of 7 statements	5.04

In addition, there were a couple of people who specifically named wanting to learn more about how to make large scale system change.

> *"How to take our knowledge of issues and invest in program development for systemic change rather than a quick fix. How do we build capacity around program development, and what is the impact?" – Focus group participant*

> *"How do we shift systemic issues while also meeting individual needs? We need to provide immediate service but then what is the direct impact? How are we moving people out of poverty?" – Focus group participant*

Others talked about wanting to innovate, take risks, or shift out of scarcity mindset.

> *"How to manage in this ever changing world, yet still do it effectively, respectfully, and in a manner that maintains high quality." (survey)*

> *"How do we disrupt scarcity mindset? Many organizations have taken risks and grown and are thriving, and it would be capacity building to hear from them. How do smaller organizations build on the secret sauce of organizations who have gotten out of scarcity mindset?" – Focus group participant*

> *"So much innovation is happening in sector that no one hears about. We should hear more of those stories…. And learn lessons from successes." – Focus group participant*

Summary of Key Themes

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To summarize, the following areas of development would, I believe, have the biggest overlap between meeting the stated needs of participants, and moving toward the stated outcome of the Theory of Change.

- Relational leadership
- Operations, particularly project, human resources, and financial management
- Planning and prioritizing, particularly from an adaptive lens
- Governance
- Virtual skills around project management and also program delivery
- Decolonization, justice, equity, diversity and inclusion
- Burnout, Workload, and Mental Health
- Creating a Healthy Workplace (beyond JEDI and burnout)
- Evaluation, Impact Assessment, and Reporting
- Fundraising and Funding Relationships
- Partnerships and Collaboration
- Communications and Advocacy
- Systems change, innovation, and adaptability

How to develop these trainings and what to focus on first will be described more in following sections.

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Pedagogical principles

The following are a summary of the key principles to consider and integrate into training development and delivery. These principles are explained in more detail throughout this next section.

- **Decolonizing pedagogy and content, and integrating JEDI principles into all trainings.** This includes ensuring that facilitators have the necessary competencies to navigate issues related to JEDI, such as holding challenging conversations, gently challenging people to shift mindset, and creating inclusive and accessible training environments.
- **Learning through networks and collaboration.** This includes integration of interactive learning experiences, including the development of cohort models of learning. It also involves supporting pathways for training participants to move from the training experience into ongoing communities of practice and opportunities for collaboration, mentorship, and networking.
- **Experiential and student-centred learning**. This includes an ongoing focus on learning through practice, opportunities to participate in "real world" learning in action, and a recognition that the most effective learning happens through a focus on head, hands, heart, and spirit.
- **Integration of systems thinking, innovation, and collaboration into pedagogical practices**.

Decolonizing pedagogy and content and integrating JEDI

Finding ways to decolonize pedagogical approaches in the community sector is both complex and deeply important, as a fundamental element of taking a decolonial approach to JEDI work. Not only is decolonizing learning an essential part of reconciliation and healing the causes and effects of colonization, but many of the most effective, healing, and justice-oriented approaches to learning share many fundamental elements with an indigenized pedagogy. In Pulling Together: A Guide for Indigenization of Post-Secondary Institutions, Antoine et al (2018, p. 18) describe Indigenous pedagogical approaches as being:

- **Personal and holistic**: They focus on the development of the person as a whole person, valuing cognitive knowing, but also self-awareness, emotional growth, social growth, and spiritual development. Such approaches create opportunities for students to reflect on these four dimensions of experience when they engage in learning activities.

- **Experiential**: People learn by doing, in the process of practicing tasks and skills they need to perform. Experiential learning encourages learning through a cycle of observation, action, reflection, and then further action. Personal experience is a highly valued type of knowledge, and indigenized learning creates opportunities to share and learn from personal experience. Experiential learning will be discussed in further detail below, as it is a major part of what I am recommending as a pedagogical approach.

- **Place-based learning**: People learn in connection to the specific place where they are located. Learning happens in relationship to physical location, as well as in relationship with the experiences of people and other beings in that place. Ways of knowing are in connection with all beings, and recognizing the dependence on living systems.

- **Intergenerational**: Learning happens through intergenerational connection, with Elders being the most respected educators.

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They offer a series of reflection questions for curriculum designers (Antoine et al., 2018, p. 22). While these are designed for educational institutions, they are also very relevant to community-based offerings, including the structuring of cohorts and communities of practice.

- "**Goals**: Does the course goal include holistic development of the learner? If applicable, does the course benefit Indigenous people or communities?
- **Learning outcomes**: Do the learning outcomes emphasize cognitive, emotional, physical, and spiritual development? Is there room for personalization, group and individual learning goals, and self-development?
- **Learning activities**: Have you included learning activities that are land-based, narrative, intergenerational, relational, experiential, and/or multimodal (rely on auditory, visual, physical, or tactile modes of learning)?
- **Assessment**: Is the assessment holistic in nature? Are there opportunities for self-assessment that allow students to reflect on their own development?
- **Relationships**: Are there opportunities for learning in community, intergenerational learning, and learning in relationship to the land?
- **Format**: Does the course include learning beyond the classroom "walls"?"

Spencer-Keyes et al talk about the importance not only of decolonizing pedagogies, but also of liberatory pedagogies that move away from goals and progress, to focus on relationships and collective wellbeing, including all people and the planet:

> "Educational systems, and systems in general, prioritizing ways of learning, productivity, and success from the desires of dominant culture leave out the possibilities of a more evolved and holistic representation of culture and learning that is inclusive and has liberation at its core. The creation and cultivation of learning ecosystems require us to learn and live in a just way — not because it's the "right" thing to do — but because a learning ecosystem would not truly be holistic without the centering of social justice education. The "whole community change" approach for example, asks us to look to Indigenous ways of being and knowing that are new for dominant culture — moving from what Elwood Jimmy and Vanessa Andreotti call "Brick sensibilities" — goal and progress focused ways that feed into existing (colonial) structures — to "Thread sensibilities" which are oriented towards relationships and collective well being, creating new systems for the greater good of all people and the planet." (Spencer-Keyes et al., 2020, p. 16)

They go on to describe equitable learning environments in which: 1) all bodies, ways of learning, and experiences are valued as part of human experience; 2) play and creativity is encouraged rather than competition; 3) ideas of productivity and time management are redefined; 4) there is space and time for people to do the inner work needed for social and emotional learning and connection; and 5) resources go to supporting learning rather than punishment or surveillance (Spencer-Keyes et al., 2020, p. 17).

They also talk about the importance of integrating an intersectional justice approach into both pedagogical approaches and content.

> "Intersectional justice focuses on areas such as: a) self-determination and values, b) collaboration with allied communities and power sharing, c) cultivating pride and identity

awareness through celebration, d) documenting history (all histories) and culture, e) the understanding of power (earned and unearned power; or, the hierarchy of power within oppressed groups) and positionality, f) care and accountability as an act of love, and g) taking action on acute issues while also striving not to repeat mistakes of the past or perpetuated systems of oppression." (Spencer-Keyes et al., 2020, p. 19)

Antoine et al also talk about the need for facilitators to build cultural safety into learning environments. They define culturally safe learning environments as follows:

> "In a culturally safe learning environment, each learner feels that their unique cultural background is respected and they are free to be themselves without being judged, put on the spot, or asked to speak for all members of their group. Unequal power relations are openly discussed and challenged in a manner that does not make learners feel that they (or groups they belong to) are being put down." (Antoine et al., 2018, p. 54)

Facilitator competencies

These kinds of decolonizing and justice-based approaches require facilitators and trainers who are able to hold a particular kind of space for learning.

In my experience and through my research, some of the needed facilitator competencies include:

1. The ability **to build and maintain relationships within a "brave space,"** rather than a safe space, for group conversation and conflict, meaning supporting participants to recognize that learning requires a level of manageable and supported discomfort, especially when our unexamined ways of understanding the world are being stretched and challenged (Atiya et al., 2014, p. 135). In my personal experience, the idea of a "brave space" benefits from being combined with a trauma-informed and relational perspective, that recognizes that discomfort can be extremely troubling for people, particularly when belonging is at risk. A trauma-informed approach to brave space involves building a container of respectful relationships coming from principles of "generosity of spirit," in order to facilitate stepping into discomfort.
2. **Deep awareness of systemic injustice**, and the ability to facilitate difficult conversations around the causes and effects of both historic and current harms.
3. A **recognition that mistakes will be made**, by the facilitator and participants, and commitment to ongoing learning and humility.
4. A commitment to **making choices toward allyship** with those with marginalized identities that the facilitator doesn't share.
5. A fluidity and **capacity to integrate a range of ways of knowing and ways of learning** into training content and process, including: head (cognitive and information-based learning); heart (social and emotional learning); hands (embodied and action-based learning); and spiritual learning, meaning learning through connection to something bigger than ourselves.
6. A commitment to being **healing-centred/trauma-informed in facilitation methods**, to recognize the endemic and ongoing effects of trauma, and to minimize unnecessary harm. For a good blog post on trauma-informed facilitation, click here.
7. A commitment to building a respectful and accountable **environment of cultural safety**, in which there is a shared belief that people are coming from good intentions, but the impact of behaviour is still taken seriously, named, and addressed.

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8. A recognition that **knowledge is shared and experiential**, and we all have it, and a capacity to elicit and amplify the knowledge in the room. This may also include having multiple facilitators with different experiences and knowledge.

Learning through networks and collaboration

There is substantial literature that demonstrates that collective and collaborative learning is a best practice, especially when it comes to understanding complex issues, or developing complex skillsets, as it is through sharing knowledge collectively, across difference and also between different generations and different kinds of knowledge, that we are able to deeply understand interconnection.

> "As we ultimately are groups of diverse beings the collective is by no means one shared model but many approaches with different emergent theories of change and individual approaches which add their value to the whole ecosystem" (Spencer-Keyes et al., 2020, p. 21)

As Spencer-Keyes et al. (2020) discuss, collective learning contexts that prioritize the quality of social interaction allow us to build our social capacity; build collective purpose, identity and action; and co-create and collaborate.
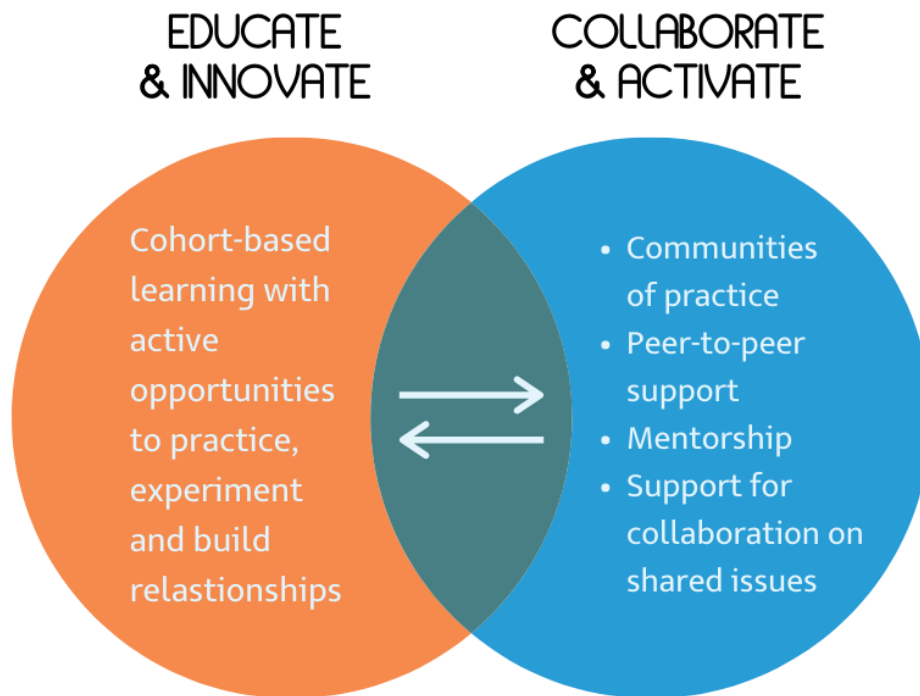
Similarly, Britton talks about the importance of learning in collaboration with others (Britton, 2012, p. 11). When organizations share experiences and perspectives, it tends to make a strong basis for collaboration. Organizations need to learn about each other and understand each other before they commit to working together.

Some of the key concepts in learning through networks and collaboration that also came up in the focus group research were:

- Cohort-based learning
- Communities of practice
- Mentorship and peer-to-peer learning
- Storytelling and sharing successes

As will be discussed in the Learning Action Plan, my recommendation is that network building be integrated into CSCNS Capacity Building offerings through cohort-based approaches, which then feed into communities of practice, mentorship and peer support, and opportunities to share successes that are supported and potentially facilitated by the Collaborate and Activate pillar of CSCNS. People who get involved through communities of practice and other network activities can also be encouraged to build their skills through Capacity Building training opportunities.

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Graph: Relationship Between Pillars

EDUCATE & INNOVATE   COLLABORATE & ACTIVATE

Cohort-based learning with active opportunities to practice, experiment and build relationships

- Communities of practice
- Peer-to-peer support
- Mentorship
- Support for collaboration on shared issues

Relationship between Educate & Innovate and Collaborate & Activate in relation to leadership development and complex issues

Cohort-based Learning

My recommendation is to use a cohort model of learning for any **complex topic** (such as organizational systems change around JEDI), **complex skillset** (such as developing collaborative partnerships), or **mindset shift** (such as moving from scarcity mindset to resourcefulness), where the goal is for people to be able to absorb and integrate complex or multifaceted new knowledge. This is particularly true for holistic and change-oriented leadership training, as described in the Developing Strong and Dispersed Leadership section of the Theory of Change.

Some of the common elements of cohort learning listed in the literature are (Fenning, 2004):

- Learners begin and end a learning experience with the same group of learners
- There is a focus on experiential learning
- There is an emphasis on mutual support, collaboration, teamwork, and relationship building
- Adult cohort learning tends to be integrated into work responsibilities to offer opportunities to learn by doing within supportive community
- Peer and facilitator mentoring is integrated in the learning experience
- Participants are asked to commit to a clear process that involves shared projects and accountability to each other and to group learning
- Limited number of participants to facilitate relationship building (20-30 maximum)

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Cohorts have been found to be extremely effective for complex or multifaceted learning for a number of reasons. One study of high school cohort programs found that cohort programs increased students' intellectual engagement, feelings of connection, and enjoyment and motivation to learn. In comparison to students in standard school programs, cohort students expressed an 18% higher investment in learning. (Turner, 2018).

Furthermore, there is substantial writing, both web and academic, that argues that a cohort model is a particularly good approach to take for change-oriented and collaboration-focused leadership development, as it support people's capacity to shift their mental models (Stearns et al., 2012), and to work collaboratively (Sharlow et al., 2009). For example, as Koonce and Lyon discuss in their blog,

> "As executive coaches, we've found that cohort-based executive development programs that integrate four specific learning components — group learning, executive and peer coaching, experiential/action learning activities and a strong emphasis on personal development and self-awareness — offer a powerful way to rapidly develop leaders at *any* level. Moreover, the cohort (community-based) nature of such leadership development programs helps nurture the traits of collaboration, teamwork, empathy, communication, social dexterity and emotional intelligence that are so essential to effective leadership of others in modern-day work settings and organizational environments."
> (Koonce & Lyon, 2019)

The focus group results echoed these research finding. Participants recognized that more complex topics require learning by doing, feedback, and supported opportunities to reflect and integrate new learning.

A few participants talked about how challenging it is, given the general level of overwhelm, to actually absorb and then integrate new skills and learning in the workplace. A number of participants talked about the importance of an ongoing supported process in groups that also allow for connection and relationship building.

> *"[It would be helpful to have] pre-work, small group work with opportunities for connectedness, sharing in a comfortable environment, and walking away with a goal for how to institute the learning. Then the organization needs to help the person integrate it." – Focus Group participant*

> *"Maybe less intensive [eg. full-day] training but more frequent with feedback and (cohort) based." – Focus Group participant*

> *"A while back our organization contracted with an HR person who then worked with number of nonprofits to host shared HR and policy workshops. It was one person who was working with all the groups around shared needs, but was also consulting individually if particular organizations needed individual help. The ED at the time found it very helpful and the person did help with our policy needs. Sharing trainings and working with other EDs at same time was also helpful."*

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Communities of Practice (this section could be more Nicole's pillar)

Research participants also expressed a strong desire for a range of different opportunities to meet and support each other's work, in both the focus groups and the feedback from prototype trainings.

For example, participants in the burnout session for EDs requested ongoing meetings and check-ins for the cohort of people who went through the training to share resources and continue working toward implementation and reflection around burnout. Similarly, participants in the Emerging Leaders training expressed desire to continue meeting for purposes of support.

There are a number of benefits to Communities of Practice that came up in the research data, and that relate back to the literature. Spencer-Keyes et al talk about communities of practice in the context of learning social innovation. The mindsets and capacities connected to innovation are complex and require an ongoing practice. To be able to innovate, people need to have time and resources to reflect, discuss, and try things and then reflect again, in ways that support them to integrate learning into real-life situations. For this reason, communities of practice work best when they support active and engaged practice (Spencer-Keyes et al., 2020, p. 25). Similarly, Waychal lists **value creation** – developing and testing solutions that offer value to stakeholders – as one of the two key principles of innovation, and then goes on to say that it is difficult to do value creation in a training setting, because it "requires real-life scenarios or at least simulation tools and is time consuming" (Waychal, 2016).

This ongoing and practice-based nature of complex learning requires ongoing and collaborative support , which can happen in a number of ways.

1. Support for Collaboration on Complex and Shared Issues

Research respondents talked about a range of reasons that it would be helpful to have support for collaboration and networking around complex and shared issues.

Some people talked about the benefits of being connected with other organizations that are doing similar work to build potential collaboration, to share stories, and to learn from each other's experiences.

> *"[It would be helpful to find ways of] networking people with the right people when they need each other. CSC could offer things that allow people to meet and discover each other. It could be content or focus groups, basically convening spaces where people can have the conversations they need to have to find the people they need to talk to." – Focus Group participant*

> *"[I would appreciate] sharing stories and experiences across organizations, for example, meeting with someone and having the opportunity to chat. Meeting and discussing what is going on in their organization or sector around shared problems and struggles, and around innovations and success stories. Like shared experiences around funding. We all come up with different methods about how we can raise money, and sharing those different ideas about how to do that would be helpful to give people different ideas about how to address that for example. Funding especially for the big issues." – Focus Group participant*

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"The intangible things [like psychological health and safety] can be really hard. [We need] increasing conversations about those things. Networking opportunities could be beneficial. It would be great to increase the knowledge sharing we all have." – Focus Group participant

People also wanted support to do the tangible and complicated work of partnership building. One person talked about needing access to partnership frameworks, which might be a training component, but several people also talked about having support to guide that work forward, which would be more in the realm of Collaborate and Activate.

"We all strive to [collaborate] and know it creates better programs and opportunities, but we end up in room together and get excited but don't have a great partnership and collaboration framework to guide us as to next the step…. [It would be helpful to have an independent body or guide or framework to help move that conversation forward." – Focus Group participant

"One of the building blocks is strategic investment in human capacity, in the "backbone" role…. [It's a support] role so everyone can come to the conversation and bring their mandate to the table rather than doing it off the side of their desk. Organizations come because it's part of their mandate…. It needs to be worth it. How can there be backbone community facilitators where their role is to support that process? All the other organizations can bring their knowledge without having to do that backbone work." – Focus Group participant

"I'm not hearing people are looking for network sharing. I want to go and talk about how do we do x thing we need to do, for example diversify the board." – Focus Group participant

2. Mentorship and Peer-to-Peer Support and Learning

Peer-to-peer learning is a very important part of both cohort learning and communities of practice. In a peer-to-peer learning framework, participants who know how to do something and feel passionate about it are supported to teach it to others. It is a great way to also integrate elements of learning culture, through the recognition that we are all teachers and learners and some of best learning happens through teaching. In particular, as people who are not formal "teachers" figure out ways to share knowledge with others through practice, they deepen their capacity to apply that knowledge in a range of contexts (Spencer-Keyes et al., 2020, p. 64). As Spencer-Keyes et al (2020) explain, the benefit of peer-led learning is "there is no one teacher that provides information and participants have to learn to navigate the resources of the peer group." (p.144). For action-based learning based in real-world situations, it is even more effective when peer learning groups are supported and supervised by a mentor.

Research participants similarly identified opportunities to connect with peers and mentors as important for their learning, around tackling shared issues, and developing new skills.

"[I would love] learning opportunities within sector through mentorship or peer support groups working in same aspect of a sector, for example finance. We could take the experience of people who have it and share it." – Focus Group participant

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"Tap into people who have experience and aren't in the sector. Like can you give us two hours a week to support people? Tap into retired people or who moved into other places to provide mentorship and support." – Focus Group participant

"Also the 55-plus EDs. How might they be part of this bringing their 20 years of experience into the room?" – Focus Group participant

Others mentioned the importance of having access to confidential peer and mentor support around common issues in the field. This was expressed as important for many people, but particularly important for EDs, as they are often very isolated with big organizational issues to address. A few people suggested this might be a modified role for the ED network to take on.

"About the ED network, we would come together but for me [I needed something different]. The ED role is weird because you can't go to people [because of confidentiality]. The circle idea was go to one another, but sometimes the things people need support around are not things you want to share in a broad group of people. Where could you go to get one-on-one support, more like a mentorship role?" – Focus Group participant

"[We need an] ED circle of practice to combat loneliness, to come together and learn from each other, and to have training and supports, around conflict resolution, HR, board relations, and so on. I hear people talk about not feeling safe in those conversations because it's a small community." – Focus Group participant

And others talked more generally about the need for confidential support.

"There are a few organizations where people are going through horrendous stuff. How do you get support where you feel safe to share and get needed support around crises? Maybe larger focus groups, since people value learning from each other, but for serious issues, maybe they need to bring them up anonymously and then discuss as a group." – Focus Group participant

"[It could be something like entrepreneurs do where there are] 5-8 people who have gone through a training, where there are ground rules … there's confidentiality, you get together once a month to share something you're struggling with, and the group provides clarifying questions, and shares experience…. If you can establish a level of trust … it's a game changer in the face of isolation. People try to do things on their own and keep the problems inside, and it's a lot for one person to manage." – Focus Group participant

"Maybe it could be smaller groups with people not in similar services so people feel more comfortable. You want people to not feel they have to hold back from raising the issues. Like I didn't want to paint my organization in a bad light or see it taken out of context. You can't unhear things, so you don't necessarily want things to be known in your group. Trust has to be there." – Focus Group participant

3. Sharing Success Stories

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A few people also talked about how helpful it is to hear stories about successful innovation and application of new ideas.

> *"How do we disrupt scarcity mindset? Many people have taken risks and grown and are thriving. It would be capacity building to hear from them…. How do smaller organizations build on the secret sauce of organizations who have gotten out of scarcity mindset?" – Focus Group participant*

> *We don't always know who's out there we could partner with … who do good work with and who aligns with our mission and vision…. How can you help us identify other partners? [It would be great to have] networking and sessions where we can hear from other organizations and become more aware of what's in our community. I want to hear about other organizations doing really good work." – Focus Group participant*

> *"I learn so much from stories. I'm not a good traditional learner. I like learning by doing and hearing how other people did things. It's motivating and inspiring. You could tell stories about how people are doing things well…. What are stories about partnerships that formed. More examples of where it's happening across all these topics would be helpful." – Focus Group participant*

Experiential and student-centred learning

My recommendation is that CSCNS focus as much as possible on experiential learning. At its root, experiential learning is a cycle of trying something, reflecting on how it went, connecting that reflection to broader knowledge, and integrating that reflection and theory into further action. Within an experiential learning framework in an organizational context, experiences are either created by the facilitator, or more often developed through people's workplaces or communities. In this context, my suggestion would be that you develop the cohort learning opportunities to be focused around a project related to the topic that can be applied in people's workplaces or community context. Examples might be developing a piece of policy, conducting an employee survey to assess culture, or prototyping a new program idea.

Swartz (2013) lists core best practice principles of experiential learning. This article offers a basic introduction to experiential learning, and is worth reading as a background to program development.

The core principles are:

- Mixture of theoretical content and experiential activities
- Safe space for students to go through their own learning process without too much judgment or assessment of their success
- Learning activities are personally relevant to the student, to create meaning and encourage engagement
- Encouraging a big picture perspective that allows students to make connections between their learning and broader complexity and systems
- Students should be supported to reflect on their own learning, to gain insights about themselves and the world
- Creating emotional investment in the learning

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- Through self-exploration, students are able to analyze and alter their values
- The presence and development of meaningful relationships to self, other, and the world
- Students are encouraged to get out of their comfort zones to stretch their capacity, both for skills development and social relationships

Experiential learning is a fundamental element of innovation and prototyping approaches. which are by nature experiential. In addition to being a fundamental part of the Theory of Change, innovation was actually mentioned as an important and underutilized skill by one of the research participants.

> *"We all talk a big game about innovation but we are not really doing it. It's important that we allow organizations to take risks and fail and we don't do that enough. It's important that CSC takes risks and if something doesn't work, then try something else. It's important that a propensity for risk and failure is built into the plan." – Focus Group participant*

Waychal (2016) offers a practical framework, based in experiential learning, for developing innovation capacities. In the framework, he describes particular pedagogical techniques that can help to develop particular competencies, all of which happen within a process of experiential student-centred learning. As he explains:

> "The framework is based on the following four principles: (a) Creativity and Innovation can be taught; (b) Student-centered learning such as, team- and project-based learning, active learning and case-study-based learning are the best methods for developing innovative competencies; (c) Diversity enhances innovation throughput; and (d) Innovators succeed while working on challenges emanating from their passions." (Waychal, 2016)

Some of the key aspects of this framework are:
- Teaching creative thinking by giving people the tools they need to find answers, rather than giving them answers
- Student-centred learning through team-based and project-based learning, active learning, and case studies help to develop innovation skills
- Methods like storytelling, drawing, and movement or embodied learning can help people access creative thinking and help people break out of their regular patterns
- Getting learners into groups that involve diverse perspectives, experience and ways of thinking can help them to think in "multiple boxes" which increases innovative thinking.
- Connect people with opportunities to learn through their passion and things they care about, and they will innovate more

Head, Heart, Hands, and Spirit

An important aspect of experiential learning is that it integrates learning in three aspects of human experience, which can be described using the concept of "Head, Heart, Hands." This refers to the idea that to really have personal transformation, and therefore make social transformation more possible, it is important to support growth in the cognitive or theoretical realm (the head), in the social and emotional realm (the heart), and in the embodied and action-oriented realm (the hands) (Sipos et al., 2008). From a decolonizing perspective, I would add the spiritual or interconnected realm as well, although this is a less commonly accepted aspect of experiential learning. By spirit, I am not only talking

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about spirituality as it is usually understood, but also a sense of interconnection and interdependence with beings, causes, and forces beyond ourselves.

The important point here is that transformational learning doesn't happen in only one aspect of our ways of knowing, but actually requires integration. **I recommend using this framework of head, heart, hands, and spirit as a guiding principle for training, whenever the topics are complex or require major mindset shifts.** For example, through my work in JEDI facilitation, it is clear to me that people are usually unable to unpack unconscious assumptions and beliefs about people who are different from themselves through theoretical learning alone, but require the feelings of empathy that come from emotional and social connection across difference, as well as opportunities to practice and apply new learning and build new habits. As Indigenous wisdom can teach us, the integration of spirit into this pedagogical model also supports people to really deeply feel the ways in which the wellbeing of all beings and the earth are interconnected, and interdependent. In the case of JEDI work, this supports people's capacity to move toward embodying the Lilla Watson quote: "If you have come here to help me you are wasting your time, but if you have come because your liberation is bound up with mine, then let us work together."

Tangible outcomes of learning

Related to experiential learning, a number of participants talked about the struggles they have around time and workload, and the importance of learning opportunities being tied to clear outcomes that they could take immediately back to the workplace and implement. This might look like:

- Training tasks and assignments based on tangible needs in their organization, such as policy development, etc.
- Opportunities to practice new skills and work on tasks in the sessions
- Feedback and support to develop their capacity and improve the work to be able to implement it

Numerous focus group participants talked about how helpful it would be to have such tangible outcomes.

> *"Policies and procedures are the bane of my existence and I want us to have templates. It needs to be part of capacity building [that we could show] up to fill them out in real time. The reward for participating is you are walking away with policies relevant to your organization. Everyone is stretched for time, so how can we think differently about reaching people and meeting them where they are?" – Focus Group participant*

> *"There are pedagogical issues of how to support people to actually implement the learning. Eventually the training is back burner, so how do you support people to activate the learning? I did a series of workshops where we worked on one thing, then took it back to implement, then came back and talked about challenges of implementation. It helped to build capacity rather than a one-off workshop." – Focus Group participant*

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"[It would be great if we were] going to do strategic planning training and you will walk away with your plan or … policy manual for your organization…. The end result is a take away so I'm investing this time but will have something at the end of it. [It could be a series.] Like strategic planning allows us to look at the big picture so … [for example] then you go to next training to get the budget done. – Focus Group participant

"I took a budget course at Dal one day a week and we had stuff to do in between. At the end I was coming out with an end result." – Focus Group participant

"[I would like] goal setting and strategic planning, policy development, but more of an educator model where you could submit something that could be modified, commented on, corrected, where you could get feedback." – Focus Group participant

Others talked about wanting a database of templates:

"I need really tangible things like communication templates, a shared database of job descriptions, sample board reports, like best practice samples in shared database. Like for example, here are the competencies for a financial manager. We should use the resources that exist and share. You don't have to start with blank piece of paper." -Focus Group participant

Online vs In-Person delivery

Survey participants gave the following responses to the question of their preferred delivery methods for training and learning. The following are the top four choices picked.

What mode of learning and delivery methods do you find to be most effective? (Pick all that apply)		
In-person	79/96	82.3%
Online	51/96	53.1%
Blended learning (a mix of online and in person)	61/96	63.5%
Collaborative problem solving	59/96	61.5%

I interpret these findings to mean that whenever possible, it is preferable to offer in-person trainings. However, given the reality of COVID, cost, the extent of the reach you want to have, and distance, that may not always be possible. In these cases, it will be helpful to integrate as much interaction and engaging methods as possible, and to offer people opportunities to interact and collaborate around real-world issues.

Here are some questions to consider when determining which trainings to prioritize as in-person when possible:

- Is this a presentation that lots of people can participate in, or is this more of an experiential or cohort-based offering? Experiential and cohort offerings benefit from having at least some in-person contact.
- How much collaboration is needed between participants? If you are needing lots of collaboration to happen and you are not able to do it in person, then you will need to make sure people know how to use online collaboration tools.

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- Are there activities that would be helpful for learning that would be hard to do online (eg requiring equipment, or that would benefit from being able to move or physically work on something together)?
- How important is relationships to the learning in this context? It is easier to build relationships in person. If you are not able to support in-person relationship building, you will need to plan carefully to find online facilitation ways to connect people.
- Will participants have access to the technical tools that would make this possible online (bandwidth, set up, technical competency)?
- What kinds of technical support will the facilitator(s) need to be able to host engaging, interactive, and experiential online training opportunities that fit the learning needs for this particular topic?
- Are there ways to come together for relationship building and parts that need in-person support, and then do other parts of the learning online or independently?
- If this is an topic that requires participants to interact around emotionally charged issues (identity, relationships, conflict, etc), do we have the capacity to create a container, offer emotional support, and manage conflict in an online setting?

Learning Plan

This section lays out overall structural suggestions with a few examples to highlight the principles I am using. Each of the larger topics, particularly anything that would happen through cohort-based experiential learning or prototyping, would be developed in collaboration with content experts and/or curriculum development specialists/facilitators, to determine the exact content, learning objectives and structure.

Overall, I am recommending a combination of the following approaches:

- **Cohort model focusing on experiential learning** for any complex topic, complex skillset, or mindset shift. Some of these may include opportunities to prototype solutions, depending on capacity and topic area. Cohort offerings should as much as possible integrate an experiential "head, heart, hands, (spirit)" approach, as well as offering opportunities to access mentorship, support, and community connection.

- **Supported Communities of Practice** (COP) for any learning or development that would benefit from ongoing practice opportunities, networking, and community support. COPs could include: 1) support for collaboration on complex or shared issues; 2) access to mentorship and peer support; and 3) opportunities to share and learn from success stories in the sector.

- **Continuation of prototype model**, similar to what you offered this year with two sessions and practice time in between, for any topic that you might want to assess for interest, or any topic that needs hands-on practice, but is not as complicated as the topics that would benefit from a cohort model. This might include: 1) relatively straightforward technical skills that need some support but not intensive, such as financial management, or 2) other topics you want to introduce to the sector in a prototype format.

- **Webinars and presentations** on any topic that is primarily about providing information, not about learning a skill, and that could be offered to larger groups of people. It is beneficial but not always necessary to integrate small group discussion and opportunities to help people integrate the information.

- **Pre-recorded trainings** for basic or technical skills development that requires less support for integration, for example how to use particular project planning tools, or basic human resources practices and procedures. Be careful to only use this format for relatively simple topics that people should be able to integrate on their own, or with minimal help. It is also possible to develop some pre-recorded trainings that support people's inner development (for example around communication skills), as long as there are assignments that encourage self-reflection and integration.

In addition, integrate the following principles as much as possible into all offerings, as they will help you build toward the larger systemic work and mindset shifts necessary for successfully reaching the impact as described in the Theory of Change:

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- Theoretical, experiential, social/emotional, and spiritual learning and engagement strategies (head, heart, hands, spirit)
- Integration of opportunities for creativity, innovation, stretch mindset, and meaningful dialogue
- Principles of decolonized and JEDI-informed pedagogy and facilitator competencies
- Opportunities to collaborate and build relationships through reflection, shared projects, and support for challenging conversations

Short-Term Offerings: 2021 through 2022

My recommendation for the first year or two of offerings is to focus on the themes from the Theory of Change of 1) **Strong and Relational Leadership**, and 2) **Healthy Organizations**. These two themes encompass many of the training needs identified in the research, and build the capacity of community sector organizations to have the resilience to do the bigger system change work.

Cohort-based opportunities

I would suggest reviewing the feedback from the prototype "Capacity Building" trainings, as well as the Burnout, Emerging Leaders, Decolonization Learning Journey, and African Nova Scotian Learning Journey offerings, and choosing 2 to 3 of them to expand into a full cohort model. Any one of the topics from the prototypes could be framed within the themes of Strong and Relational Leadership and Healthy Organizations. I haven't had a chance to look at the evaluations in enough detail to determine which it would be best to expand, but I would use the following criteria:

- The level of interest in going deeper into the topic
- The level of urgency people feel to do the applied work, as a cohort needs a group of approximately 20 people to be willing and able to commit to the process
- Availability of facilitators with the necessary competencies to: 1) teach the material; 2) facilitate an experiential cohort process; and 3) integrate the larger learning goals of learning and growth mindset, innovation, resourcefulness, decolonization and JEDI, and systems thinking.

The following are examples of possible ways to expand the offerings:

1. A practical approach to **integrating decolonization and/or JEDI** into organizational culture and processes, including: understanding the barriers to JEDI; building an organizational mindset and culture that supports JEDI; change management; recruitment, retention and advancement; integrating JEDI into policies and practices, and so on.

2. A deeper dive into **adaptive and transformative planning**, and how to integrate it into both planning and implementation. This could include an emphasis on prototyping and evaluation.

3. Expanding on the **Emerging Leaders** training to involve more hands-on practice in two potential ways:
   - Relational leadership focus: supporting and building effective teams; coaching approach to leadership; navigating conflict, decision making, and challenging conversations;

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supporting healthy feedback; workload and burnout; developing and implementing effective policies and practices; human resources management; or related topics.

- o Management skills focus: financial management; human resources management; project management, etc.

4. Expanding on the **Burnout Series for leaders** to involve more hands-on practice, and support for practical implementation of burnout prevention in the workplace

5. A practical approach to **psychological safety** in the workplace, including methods for evaluating the current culture and level of safety, and a supported process for implementing and evaluating methods for increasing safety.

6. A **practical approach to evaluation** with a focus on impact, but also with an integration of principles related to being a learning organization, such as prototyping, giving, receiving and integrating feedback, stretch mindset, and supporting an organizational willingness and safety to learn from mistakes.

7. A practical approach to **Advocacy and Influencing Policy Decisions** that could offer participants an opportunity to develop advocacy skills, and then collaborate to advocate around a shared issue.

8. A practical approach to **collaboration and partnerships**, with tangible outcomes around building and beginning to implement a collaboration agreement with an outside stakeholder.

Cohort Example

As one example of what a cohort program might look like, here is a rough sketch of one way of expanding the Burnout Series into an experiential cohort learning process:

Process
• Participants go through a selection process that confirms they: 1) have some level of organizational leadership or impact on culture; 2) understand the level of commitment required; 3) are committed to participating fully in the program; and 4) have organizational support to do so. • There are many opportunities for interaction in the whole cohort group, and people are assigned to smaller peer groups, where they can go for additional support and are accountable to each other. • Sessions are offered over an extended timeframe, with space in between each session, and opportunities in between to get support (eg. peer meetings, office hours, coaching calls, etc.).

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• Spacing and length of sessions should depend on the format chosen. For example, it could by bi-weekly three-hour online sessions over three months, three full-day in-person sessions with more time in between, or a different model that allows for connection and group building, and also time to do work and get support.

Learning Outcomes and Activities

Understand burnout as a systemic and organizational issue	Head	• Understand organizational and systemic causes and effects of burnout in the workplace (this might include information shared in the original burnout series) • Investigate and challenge hindering beliefs that exist in the organization, such as scarcity, saviour mentality, expert culture, urgency, etc
	Hands	• Do a practical mapping of how signs of burnout are showing up in the workplace • Learn simple practical tools or generate questions to assess the level and causes of burnout in their workplace, with support from peer group and facilitator • Do a basic assessment and share results with group to identify possible interventions
	Heart	• Exposure to stories about people's experiences of burnout and what happens when it is treated as an individual issue rather than a systemic issue, to build empathy and commitment to addressing it • Learn how to take a coaching or Appreciative Inquiry approach to support, so that people can practice offering each other support in their peer groups
Build resilience against personal and staff burnout	Head	• Self-reflection to build understand how hindering beliefs show up in self
	Hands	• Identify personal daily resilience strategies, such as mindfulness, grounding, movement, prayer, self-care, etc. to build resilience, and challenge hindering beliefs. • Reflect on how leader might be able to model practices, in order to support staff • Include embodied activities throughout, to encourage development of body wisdom and trauma-informed practice.
	Heart	• Connect with cohort members and share experiences, affirmations, and support to deepen understanding, build relationships, and co-regulate each other's nervous systems • Encourage gentle and generative questioning

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	Spirit	• Connect to deeper values, and sources of interconnection to deepen commitment to wellbeing of all. What is the deeper belief or value that has led each member of the cohort to want to do this work?

Organizational systems and culture change management	Head	• Learn about adaptive change management principles: how to get people on board, rolling/adaptive planning, identifying roadblocks, working with people's emotional reactions to change, etc.
		• Identify the specific challenges to shifting culture around burnout that exist in their organizations
		• Understand what leadership competencies can help them address those particular issues, for example:
		   o Taking a coaching approach to leadership
		   o Priority setting and workload management
		   o Creating cultures of care
		   o Inclusive staff engagement and decision making
		   o Conflict intervention
		   o Advocacy with funders and external stakeholders
		   o Making a case to get senior leadership on board
		• Some of these competencies would be integrated into content and structure of the cohort, so that people are developing them as they go through the training

	Hands	• Identify one aspect of the workplace culture that feels possible to shift, and make a plan to get people on board (management and/or staff) • Get support and mentorship in the cohort to develop leadership competencies that would be helpful, or if they are new areas of learning that are outside the scope of this training, the initial plan might be a professional development plan to build those competencies (In some cases, this might also be a great way to integrate people into Communities of Practice) • Go back to basic assessment to evaluate success or determine possible modifications, with an adaptive plan
	Heart	• Continually connect with cohort, facilitator, and specific peer group to affirm successes and support development
	Spirit	• Ritual and celebration of process and successes
Tangible Outcomes		
• Participants leave with a clear sense of levels and causes of burnout in their workplace, and a plan for how to address one of the causes. Initial efforts to implement the plan have been started, with attention to assessing how it is going along the way.		

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- Participants have begun building a habit of self-reflection and awareness around their own hindering beliefs about workload and burnout, and how to build their own resiliency and support staff to do the same.

- Opportunity following the program to form Communities of Practice (peer groups, collaborative projects, sharing stories, etc), or integrate participants into pre-existing COP.

In addition, if you assess that there is capacity internally at CSCNS and interest in the sector, you could choose one of the 2-3 cohort groups and expand it further into a prototyping bootcamp. It would be best to choose one of the topics that has a clear external and collective impact, such as "Advocacy and Influencing Policy Decisions" or "Collaboration and Partnerships," but any of the topics could be developed to allow for innovation, as long as there are opportunities for everyone to learn from each other's successes and failures. If there is not capacity for this kind of process in the next 1.5 years, you could offer an introductory training in innovation and prototyping, similar to the prototype capacity building trainings, to help people understand innovation and prototyping as a skillset, and then offer a prototyping process at a later stage.

Communities of Practice

As mentioned in the description of tangible outcomes, with support, cohort groups offer a great opportunity for building ongoing Communities of Practice, as participants have already built relationships and been able to identify shared goals and interests. Nicole could participate in cohort-based trainings toward the end of the group's time together, to identify what kinds of ongoing support and collaboration would be helpful, and to encourage people to continue working together.

Continuation of Capacity Building Prototype Model

For any training topics that require a deeper dive that you haven't yet developed, I would suggest continuing with the prototype model that you developed in collaboration with IC, with a few modifications:

- Increase the time of each session to 2 to 2.5 hours
- Include a voluntary "office hour" between the first and second sessions, to provide participants an opportunity to connect with the facilitator to ask questions about their attempts to implement
- Make sure all prototype trainings include clear and relevant tools for implementation or deepening understanding of the topic
- Be strategic about the use of breakouts and group work, to prioritize learning over connection, as there are other opportunities to connect, and 2 hours is a short amount of time for content delivery and integration
- Focus on experiential learning as much as possible, so that people have a chance to integrate and access multiple ways of learning
- For complex topics, consider providing video recordings and readings in advance, so people can come ready to ask questions and engage with the material

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In addition to the possibility of updating and repeating any of the offerings from this year that are not being expanded to a cohort, some possible topics based on the research that could be good options for further offerings of this kind would be:

- Principles and practices of JEDI implementation
- Understanding conflict and conflict resolution basics
- Understanding and re-imagining governance
- Supporting staff mental health and resiliency
- Prioritizing staff engagement, teamwork, and decision making
- Organizational culture change: principles and practices
- Financial planning and management
- Communicating for impact
- Developing relationships with government and funders
- Systems thinking in complexity
- Network bricolage and asset-based mapping
- Securing operational funding
- Goal planning and prioritization
- Project management tools and processes
- System-oriented entrepreneurialism and innovation (an introduction)

Pre-Recorded Trainings

Some simple skills or information-based offerings can be offered as pre-recorded trainings that come with worksheets, templates, or guiding questions to support participants to integrate the learning into their context. It would also be helpful for these kinds of offerings to suggest resources for further learning for people who need to go deeper than a pre-recorded training can offer. It is important to note that most of the topics below could also be expanded out to be longer and more skills-based trainings. A pre-recorded offering should be seen as an introduction, rather than a deeper learning experience.

Examples of training topics that relate to the themes from the data that would be appropriate for this kind of format would be:

- Introduction to principles of human resources management
- Basic principles of recruitment, hiring, retention, and advancement
- Performance management, evaluation, and feedback methods
- Understanding financial statements and financial management 101
- Basics of project management
- Building sustainable funding and resource models
- Introduction to virtual team collaboration tools
- Principles of trauma-informed care
- Identifying bullying and harassment in the workplace
- Digital fundraising basics
- Partnership agreement best practices
- Proposal writing basics

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In addition, materials from past trainings that are not going to be offered in the same format could be repackaged and expanded upon, so that people can continue to access the learning at their own pace.

Webinars

Webinars and other kinds of more traditional presentations can be useful for any topic that is more about information provision rather than practicing implementation or skills development. The benefits of this format is they are simpler to develop, and can have a larger audience. The downside is that people often don't have an opportunity to integrate learning into practice, and many people only remember the key messages on a relatively surface level. This means this format should be saved for topics where you want to communicate a basic message to a broad audience, and where depth of understanding is less important than reach.

Evaluation and Adaptation

It will be important to develop clear evaluation systems for all offerings to help you to assess and adapt to the needs of the sector. I would recommend that this include pre and post scaling questions about people's level of knowledge of and comfort with the topic, as well as qualitative and quantitative feedback about what kinds of trainings would be most helpful in the future. I would suggest making a list of possible offerings based on the findings from this report, and asking participants to rank in their evaluations which other trainings they would most like to see developed.

Medium-Term Offerings

In the medium term (2023-2024) I recommend using a similar framework as outlined above. You can expand the cohort offerings into larger and more complex topics that can feed into communities of practice. Any cohort trainings from the short term offerings that continue to spark interest could be continued, and possibly rotated on a biannual basis to leave space for new topics.

Based on feedback, determine which of the current prototype trainings the short-term prototype offerings that have not been turned into cohorts would have the most appeal to people. You could at this point add 2 to 3 more cohorts, in addition to reoffering 1 or 2 from the previous cycle. I would recommend having at least one that is specifically to support people to develop their capacity for either: 1) system-oriented entrepreneurialism and innovation, or 2) network bricolage and resourcefulness.

Innovation Bootcamp Example: Building Sustainable Funding and Resource Models

Alternatively, rather than designing a cohort training specifically on innovation or resourcefulness, you could choose a topic that has great resonance and possibility for collaboration, and integrate innovation and resourcefulness into the curriculum by expanding it into a prototyping or social lab bootcamp. This will increase people's understanding of innovation, resourcefulness, and systems change practices through experiential learning, rather than through the subject matter.

For example, you could do a training on **Building Sustainable Funding and Resource Models**, and integrate the following innovation and resourcefulness elements in the actual prototyping activities of the bootcamp:

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1) Lead them through a process of creative idea generation and prioritization, and then encourage people to group together based on the approaches to sustainable funding that are most resonant for them

2) Support people to map their collective assets as they relate to the goal of sustainable funding, with a theoretical understanding of network bricolage

3) Build collaboration skills by creating shared project groups among participants, with specific supports around how to create partnership agreements, determine decision making processes, and address conflict that comes up in the small groups

4) Encourage them to do adaptive planning to develop their prototype idea, and adapt to any changes that come up through the process

5) Encourage a prototyping, learning-by-doing, play-based and "fail forward" mentality around the work of the project groups, and then celebrate whatever comes out of it

6) Towards the end of the process, identify prototypes that have the potential for high impact, and brainstorm how they could be improved, expanded, or supported

7) Support people through communities of practice to keep moving forward with plans that show promise

This model of experiential learning is fairly resource intensive, as there would need to be coaching support for the small groups, as well as facilitators with content knowledge as well as prototyping experience. It would also need to be a collaborative effort between all three pillars of CSCNS's work. That being said, it would have the potential to have a major impact not only in terms of capacity building toward the Theory of Change, but also could be a huge opportunity for network building, and could potentially have an impact on funding sustainability and access to other resources in the sector.

Leadership Development: Medium to Long Term

Finally, in the medium-term, I would recommend you start building a more comprehensive change-oriented leadership program, specifically oriented toward developing strong leadership, and teaching emerging leaders to be able to guide the community sector toward the greater impact laid out in the Theory of Change. It would ideally integrate some of the offerings already developed, and could include a microcredit or certificate option for participants.

This absolutely should happen in communication and possibly collaboration with educational institutions or other leadership programs. As Clutterbuck and Arundel state (2017, p. 31), "The approach to leadership development needs to include a robust set of leadership development options,

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programs and supports; a receptive sector that will share leadership and promote internal development; and resources to support leadership development over the long-term." They list a range of supports for leadership development, some of which could be part of what CSCNS offers, and some of which would be through collaboration:

- Formal education through post-secondary institutions
- Succession planning and mentorship, including supporting current leaders to trust newer people to step into leadership roles
- Structured training programs that are experiential and ongoing. These need to be sustained over the long term to really develop capacities, and are best combined with mentoring, leader circles, and peer to peer support for those moving into leadership roles from frontline experience
- Paid internships and apprenticeship, secondments, job shadowing, and experience sitting on boards
- Learning opportunities about the sector, and particularly sector values and system understandings, for people coming from private or public who might have management and leadership capacities but not sector understanding (Clutterbuck & Arundel, 2017, pp. 31–33)

There are many excellent resources and programs that focus on developing core competencies for leaders in complex times that could offer you a good starting point for thinking about this stage.   The Federation of Community Social Services of BC has an extensive leadership program that would be an excellent starting point for imagining what CSCNS might want to offer. In their 2020 Leadership Report, they state:

> "The foundational elements [of the program] include ways of knowing, leadership styles and approaches, strengths-based approaches, authentic leadership and trust-building, working through fears and limiting beliefs, coaching skills, team development, working with complexity and systems, collaborative ways of working (such as Circle practice, Appreciative Inquiry, World Café, Open Space Technology), working across differences and conflict resolution, communications, change and adaptive leadership, inter-cultural practice, cultural agility, social innovation, courage and voice, activism and advocacy." (Foundation, 2017)

Similarly, Simon Fraser University offers an Executive Leadership Certificate Program that focuses on a complex systems approach and the development of leadership mindsets. I have coached in the program, and am aware of the personal transformation that is experienced by many program participants. More information about the program can be found here.

Both of these resources are for your own reflection as to what an impact-oriented leadership program might look like, rather than a suggestion as to how you might want to proceed.

Final Thoughts

Thank you for inviting me to participate in this process. I am grateful to have had the opportunity to contribute to this important work to imagine a pathway to a more resilient, caring, and impactful

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community sector in Nova Scotia. Please don't hesitate to reach out with any questions, as I am happy to support in whatever ways I can.

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Appendices

Appendix 1: Obstacle Quotes

Funding and Fundraising as an Obstacle

"We turn ourselves inside out to fit funding criteria and we individually advocate that they need to rethink expectations, but it would be better if we could advocate collectively. The reaction and response to COVID was huge pots of short term money and it helped some, but others with longer term needs around the response to clients or needing to adapt to remote work, we need longer term sustainable funding and staff." - Focus Group 2 participant

"Our core provincial funding has not changed in 5 years, yet the demand and gravity of requests for aid we receive has ratcheted, especially in this pandemic year. We cannot expand our services as needed, as there is no funding to do so. My staff is brilliant and engaged, but they are struggling. There is so much to do and so little support for them as they work as many hours as possible and give so much." - Survey

"We need to rebuild trust with funders. We need to have conversations with existing and new funders. What would it take to have new and better relationship with old funders? Right now dollars are going to reporting, not to good outcomes. McConnell Foundation is seeking to partner with organizations to move from proving to improving. They want people to spend less time on reporting. But also there is a heavy emphasis on public dollars. We need diversity of funding. How does trust and relationship get built so that time and resources get spent doing the right thing?" – Open Forum participant

"When organizations are underfunded or struggling to get operational funding, it's hard to do anything else when they are fighting to keep doors open. There are 6,600 nonprofits. Could some of them come together if they are developing similar services? Could they amalgamate and become stronger with less operational funding? Some organizations are really programs not organizations. They have one or two programs with whole infrastructure. Is there an opportunity to join with someone who delivers similar services with cluster employment to support that? But also we need more sustainable funding from government. United Way opportunities to fund are not as lucrative as they were. Also there was a trend not to support operations. We need to recognize and support those costs." – Focus Group participant

"Time is a factor and also changes that have been made to institutional response regarding mental health, and funding cuts that have impacted nonprofit organizations and increased systemic violence. This has overwhelmed nonprofit organizations. Organizational infrastructure no longer supports the work and way we have done it no longer works. We're caught in this situation where you know you need to change and reflect and restructure, but also still doing the day to day, and there is also expectations and outcomes related to funding and that's challenging if criteria doesn't enable flexibility – Focus Group participant

"We are a small (working) board. we host community events and build / maintain a physical building for this. we have very limited funds and no long-term funding. in summers, we apply for CSJ to get a

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staff on board (that's when we mainly operate). we are fairly new, and don't have an accountant on our board, so financial management is pretty messy. all board members are doing almost all the things needed to run both the organization and the community activitist (and in summer we also manage youth as staff). it's asking too much of our board volunteers, and creating financial challenges to not be able to plan long-term. as always, nobody wants to fund the overhead. working on social business models but it's not easy to do that on the side + stay within the tight rules for NFPs and food safety restrictions AND now staying within covid needs (many of our possible revenue drivers would include food and outdoor cooking (food safety does not like that) or sharing close space). should be easier to just feed our community, really." – Survey

"Our core provincial funding has not changed in 5 years, yet the demand and gravity of requests for aid we receive has ratcheted, especially in this pandemic year. We cannot expand our services as needed, as there is no funding to do so. My staff is brilliant and engaged, but they are struggling. There is so much to do and so little support for them as they work as many hours as possible and give so much." – Survey

"Have not had any extra funding in over a decade despite costs rising. Also challenging to fight for fundraising revenue in communities where many organizations have established fundraising ventures." – Survey

"Securing core funding over project-based funding is always of concern. There are significant dollars (government) for project-based funding, but core funding is always difficult to source. It's a significant barrier to the growth of nonprofits." - Survey

"Issues that don't directly relate to our vision, mission, purpose are often pushed to the "side of the desk." Although we recognize they are important and we need to work towards developing processes, policies and procedures to address, time and capacity simply don't permit. It's a vicious cycle. We're doing our best to fulfill our mandate, but I always feel as a leader that I need to be doing more to get to the "side of the desk." Often the file there lurks until things come to a head or organizationally, I'm able to engage the board to make it a priority. We're fortunate in our organization that some of our board members are willing to take leadership on parts and pieces that ultimately free my time up. Still there are many things in the "file" that remain unaddressed. As many small organizations, capacity and funding to do more are related. Many grant streams don't permit funding for people, they magically feel the work can get done without them. The fact is we need people to drive our program and services, and this funding model puts us on the hamster wheel." - Survey

Appendix 2: Capacity Building Quotes Grouped by Theme

Leadership skills for running an organization

"We need to have opportunities for great frontline worker training around leadership development. Things like how to be a good leader rather than manager, conflict resolution, frontline work, working with colleagues effectively, strategic plans, budgets, financial management, relationship building, and so on. Not everyone who might be moving up into leadership knows how to do that." – Focus Group participant

"EDs have been promoted to their position because they have program experience and are promoted, but the skills and competencies are different. They are placed in a position and pared up with a board that may or may not have the full competencies to support them, and then they go off to save world, but no one has given them tools to do that. ED competencies are how to read a balance sheet, having a business mind and a nonprofit heart, dealing with HR issues, supporting staff from the HR perspective. EDs need to have business skills." – Focus group participant

"We are facing an opportunity to grow our staff and impact. Having more resources in regards to Human Resource Management is something we are lacking." - Survey

"[We need] leadership training for women to teach them how to navigate patriarchal systems: [to understand] why you're held back, why your skills aren't as valued, and to be able to make those skills stand out. We need to teach people how to stand up and be a leader not a manager. Even beginner courses on that would be helpful." – Focus Group participant

Relational Leadership

"[We need] opportunities for great frontline worker training around leadership development: how to be a good leader rather than manager, conflict resolution, frontline work, working with colleagues effectively, strategic plans, budgets, financial management, relationship building. Not everyone knows how to do that."

"Leaders have to be trained in how to connect with people in ways that are real, for example how to manage people, performance measurements, and people management." – Focus Group participant

"We need group dynamics training. Group dynamics stops governance from going well." – Focus group participant

Strategy, Planning and Prioritizing

"So many nonprofits are trying to do everything. We need to get clear on what we can do, and what we need to say no to. And also learning what others are doing and syncing up with each other. We need to prioritize and do an impact assess from resource perspective, in relation to community need. We are trying to do so many things and it feels like we are doing nothing really well. We need to get clear on that from an ED perspective, and give clear direction to

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staff. It's about being mission driven rather than doing whatever comes along." – Focus Group participant

"[We need] project management systems such that at any time, any one of us can quickly get up to speed on a particular project and know when it is going well and what is challenged." – Survey

"The organization needs stronger, firmer leadership in order to get things done more efficiently and have a clear direction. I think the organization ends up wasting time and funds without accomplishing that much at times. There also needs to be more emphasis on communications, as most people are unaware of the organization." - Survey

"How to move a diverse and siloed organization into a fully integrated organization." – Survey

"People need to do strategic planning and goal setting, and then be able to evaluate if they've met their targets. They need to identify gaps and where to grow. It's strategic and business planning. People have no idea they should be doing business planning or where to start." – Focus group participant

"Policy stuff is the other thing we struggle with is keeping up with revisions and gaps in policies and practices and is often something you do off the side of desk." – Focus group participant

Operations

"Infrastructure development, governance and putting in place processes and policies needed to sustain the organization." - Survey

"As an organization we are working on transferring our systems to better manage our work and documents in order to support our mission delivery." - Survey

"Managing the complexity of demands in the ED role - balancing board relations with team/project management" – Survey

"Not all nonprofits have funding to hire CPAs so often the people responsible for budgeting and accounting don't necessarily have all the knowledge that would be helpful, and not all EDs come in with business backgrounds, so most are learning on the fly how to manage and do budgets and how to project three to five years." – Focus Group participant

"[As a funding body] people are asking for money but putting massive surplus. It's partly people have no time, but they won't make appointments with an accountant who would help them on United Way's dime. So they create a budget with zero expenses. I can't do anything with that. How do we get those dots connected? How do we get people thinking about budgeting for planning ahead?" – Focus group participant

"HR training: how to hire, offer letters, retain, keep employees engaged, feedback, difficult conversations." – Focus group participant

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"There must be great project management tools/styles that we can draw on instead of re-inventing the wheel." – Survey

"Changing policies and procedures in an ever fluid landscape." – Survey

Governance

"Conversations about what kind of a board are you actually: policy, management, hybrid, and what does that mean in terms of roles and responsibilities of volunteers and ED. People say "I was on a management board for three years and didn't realize I had a second job." [It's important for people to understand] it might be a policy board but behaving like management board" – Focus group participant

"[What are the] roles and responsibilities for the ED, review of bylaws or board manual, executive limitations and what the ED can do on their own and what they need to bring to the board, how do I behave as chair and how do I behave as ED?" – Focus group participant

Staff Skills

Virtual Skills

"Managing our files, eg dropbox is a challenge, keeping up with all communication in a timely way is a challenge. need a good system for maintaining electronic files." – Survey

"Engaging online educational games and social activities for marginalized learners" - Survey

"How to maintain relationships virtually. You know, the watercooler moments and collaboration and teambuilding." – Focus group participant

"It's amazing how people have adapted quickly, but training on all of the tips and tools to facilitate virtually." – Focus group participant

"Developing teamwork in a distanced digital environment." – Survey

Program Delivery

"Sometimes people just don't have training around providing service to people in crisis, and don't have trauma-informed care training. They're trying to do their best." – Focus group participant

"There's an increase in participants coming with mental illness rather than physical disability. Training around that would be helpful. Something more in-depth than mental health first aid. We need to understand various mental illnesses that people are presenting with to really understand how to help them." – Focus group data

"If we paid more attention to social determinants of health and had that as an orientation for board and staff, it would be a contextual piece that helps our understanding. There are more likely to be

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people who have other stresses in their life. It would be an orientation to context around the work of individual organizations to talk about experiences of marginalized people in context." – Focus group participant

"It would be good to have more staff with training in self-advocacy for service users, including law for people with disabilities. All staff should have training in that." – Focus group participant

"Meeting the needs of seniors around COVID. What do they need help with? What are the needs around affordable housing?" – Focus group participant

Communications

"External communications and marketing - making social media work for nonprofits" – Survey

Psychological Safety

JEDI

"Where to start with JEDI policies and becoming an anti-racist organization, getting diversity and engagement on the Board, time for funding applications and sustainability work, lack of clear strategic plan" – Survey

"Growing our knowledge of justice, equity, diversity and inclusion so that we can emulate these principles in our day to day work." - Survey

"Our organization is not being proactive in relation to justice, equity, diversity, and inclusion. I'm not sure how to influence this change." – Survey

"Our biggest concern at the moment is adding in a diversity and equity lens. I specifically am working more in community building, and we don't have any existing relationships with underserved or historically marginalized communities." – Survey

"We would like to have a more diverse membership, access artists from more diverse communities and teach our membership how to build relationships with these underserved communities." – Survey

"The social spotlight of 2020 has highlighted the lack of diversity in our organization and challenged us to address issues of inequity and fostering and inclusive work environment." – Survey

We need to work harder to reach BIPOC and First Nations communities in a way that fosters trust and respect."- Survey

"How can we assess the progress we are making towards of goals of diversity, inclusion, and equity?" - Survey

"Embedding anti-racist practices into our organizational DNA" – Survey

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"My experience is I don't know how to bring diverse voice to table that's not tokenism, and to find the right voice. And for staff recruitment, how to find people and give them the opportunity. People say just start giving people a chance. I love that thinking, but don't know where to start. I don't know how to recruit without it being tokenism. It would be great to have practical ideas and supports. And throughout the organization, how do we make these voices heard? I would like support and advice on how to do that." – Focus group participant

"How to increase diversity. It's one thing to say these things, how to actually give people the tools to recruit for diversity." – Focus group participant

"DEI so important. People are starting to recognize that, but few have the capacity to implement and action that. How do they do that? We need learning and training and support around that, and don't just have a session and send them off. Give people some tools and supports to do that. There's a great desire but it's very complicated so how do we accommodate that?" – Focus group participant

"How do we develop a committee around DEI? It would be good to have something around the topic but more around what are actions people have taken for small organizations. We have had some learning opportunities, but what are next steps to take it into community and as an organization?" – Focus group participant

"We're trying to make changes, and are offering training on gender diversity and inclusion, racial diversity and inclusion, but understanding peoples backgrounds and how much they know can be difficult. It would be great for people who don't understand [to develop] a baseline understanding. For example around pronouns. Lots of people understand the basics of she/her, he/him, they/them, but how can we create more inclusive space. If people don't understand why the conversation is happening it's hard to get them to buy into training." – Focus group participant

Workload, Burnout, and Mental Health

"Workload and burnout - how to rest when the work feels critical" – Survey

"Not enough money or time to do the work we need to do. Current staff is experiencing burn-out; as our organization grows which leads to an increase in workload there is no additional funding to hire additional staff." - Survey

"As a union member I see other members (particularly young and new to their jobs) struggling to maintain healthy work /life balance. As frontline workers during a pandemic more could have been done by management to ensure that all staff are functioning adequately and performing self-care." - Survey

"Mental health support for staff. You can't give to others what you don't have. How do we take care of our people and give permission to people to take care of themselves? How do you support your team with emotionally tough work?" – Focus group participant

"It would be great for organizations to have an umbrella training about how to make culture shifts around mental health in the workplace." – Focus group participant

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Creating a Healthy Workplace

"Trying to ensure staff are supported and engaged in their work to the best of their ability." - Survey

"Psychological safety. The majority of the time intentions are so good, but we need to understand power dynamics and more diverse workforce and understanding why a contracted employee might not want to speak out." – Focus group participant

"Safe workplace training, like sexual harassment training but also more broad, and mental health in the workplace." – Focus group participant

"Effective communication is hard. Learning how to continually communicate effectively." – Focus group participant

Organizational Sustainability

Evaluation, Impact Assessment, and Reporting

"We are challenged as a new team in an organization without great templates or resources to provide training especially when it comes to measuring impact." – Survey

"Charities struggle because they don't know how to define their own impact. We exist because we exist and don't know how to question that. If we could have more understanding of how to define impact that would be great, for example here are our 5 impact points and what we do for society. We can't always articulate it to win more grants." – Focus Group participant

"How to do reporting and evaluation. How to demonstrate stories in a way to attract more funding, and show the impact of the work. Everyone's sick of surveys so how can we demonstrate impact? What are evaluation techniques that demonstrate impact?" – Focus group participant

"In order for us to report back, we have to gather info from the groups we work with, because we have to be accountable for the money. Lots of groups are having difficulty with capacity to understand the difference between outcomes and outputs, and reporting back data. In frontline running of programs, they have trouble seeing benefits to that. It's hard for them to understand value of the data I collect. But if I can report people have waitlists I can demonstrate need. I have to be able to demonstrate need to get money. People don't understand they need to give me the information I need to get them the resources they need. People are not utilizing services to help them gather data. They don't recognize the problem and are not looking for help." – Focus group participant

Fundraising and Funding Relationships

"We are very dependent on Government Grants and subsidies to operate and need to develop our own fundraising and revenue diversification to ensure sustainability in the long term." – Survey

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"Our core funding is secure but is not sufficient to cover costs. Grants make up much of the difference. We don't want to raise rates for service as our clientele is generally low income, so we need to diversify and add secure funding sources." - Survey

"Digital fundraising and how to use email and social media to acquire donors." – Focus group participant

Succession Planning

"There is more work that could be done to strengthen our industry and increase employment but it is difficult to achieve without more HR capacity, which would require more / more diversified funding." - Survey

"[We need] leadership development opportunities for succession planning." – Focus group participant

"Career development and what have I learned and how can I grow with skills I have. People need professional support and HR skills. Training should be offered to staff by the proper person with HR skills through custom learning for employees." – Focus group participant

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Complexity and Impacting Systems

Partnerships and Collaboration

"People not living up to partnerships even though they are easy to satisfy-perhaps, staff changeover, forget, do not read mail, burn out, don't really care, dont understand the services, etc volunteers sign up and don't live up to agreement staff want a job but assume they don't like working for min wage so do very little - lack of integrity." - Survey

"Our attempts to collaborate with other service providers in the area are often a struggle due to limited professional capacity of other organizations or walls built and other organizations working within silos. This leads to staff within out organization feeling burnt out. We are also at a stage where demand and capacity push and pull back and forth. Demand is higher, but there isn't quite enough for new staff/programs yet." (survey)

"Communicating effectively in a way everyone will understand, and improving communication as a skill. There needs to be collaboration around turf issues. We need to identify what it means and how we can work together. Because communication around coordinating 140 agencies and 40 staff and board and identifying where and when people need to know things, that can become a project in and of itself." – Focus group participant

"[There needs to be] collaboration with other organizations across the province." – Focus group participant

"We lead coalitions that collaborate to determine the priorities in the region. It's no good to meet every month and not do something concrete. We need leadership training to develop agenda skills, priorities for meetings, facilitation, how to be a good listener, and relationship building. When you

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lead a meeting, you can't do all the talking. We have coalition meetings, and it's important that everyone feels the meeting has merit or they won't keep coming. It's about working on goals and giving everyone time to have their say." – Focus group participant

"It's about how we define collaboration and partnership. We all strive to do it and know it creates better programs and opportunities, but we end up in a room together and get excited, but don't have a great partnership and collaboration framework to guide us as to next steps. What are definitions and parameters around collaboration? What is the best way to move forward? How could we best define it? Who does it, what does it look like, who is bringing what?" – Focus group participant

"There should be something in terms of partnership around nonprofits, like best practices around how to move forward. Maybe lists of things you need to consider. Sometimes we don't know what to ask, and it feels overwhelming to actually bring people in starting from zero. We need a guide to not have to start from zero." – Focus group participant

"We will collaborate with eight new partners this year and will make partnership plans, but we don't know what organizations exist. We don't always know who's out there we could partner with who aligns with our mission and vison. We could do more to fund research projects that would hit smaller nonprofits in the work they do, for example around trauma-informed care. How can we help those organizations grow>. How can you help us identify other partners? It would be great to have networking and sessions where we can hear from other organizations to be more aware of what's in our community. We want to hear about other organizations doing really good work." – Focus group participant

Communications and Advocacy

"We need to get over our political naivete. Most of us believe merit is enough, so the PM will pay attention and fund us because this is critical. We need to think about that he makes decisions based on what will get him re-elected. If you want to be an effective citizen, pay attention to political calculus. Merit isn't enough if it doesn't help me get re-elected." – Focus group participant

"Advocacy and how to effectively advocate with people we're working to help. For food security, it's a poverty issue, so how do we advocate with people around poverty and food security? It's about understanding the political shifts. People would agree making children fed is a priority but how do you make the politicians see it as a priority?"

"Capacity building around advocacy: how might we all work together to advocate about the sector, build communications skills, public speaking, working with government, how to write a briefing, get your message out in three minutes, elevator speeches, getting government on side." – Focus group participant

"How to change minds - prevent violence against woman, prevent MMIW and rape, poverty reduction, prevent racism and classism; being heard and respected." – Survey

Systems Change

"How to take our knowledge of issues and invest in program development for systemic change rather than a quick fix. How do we build capacity around program development, and what is the impact?" – Focus group participant

"How do we shift systemic issues while also meeting individual needs? We need to provide immediate service but then what is the direct impact? How are we moving people out of poverty?" – Focus group participant

Innovation and Adaptability

"How to manage in this ever changing world, yet still do it effectively, respectfully, and in a manner that maintains high quality." (survey)

"What issues/needs (other than those that pre-existed) will be prevalent in the next 5 years for our population as a result of COVID?" – Survey

"How do we disrupt scarcity mindset? Many organizations have taken risks and grown and are thriving, and it would be capacity building to hear from them. How do smaller organizations build on the secret sauce of organizations who have gotten out of scarcity mindset?" – Focus group participant

"So much innovation is happening in sector that no one hears about. We should hear more of those stories…. And learn lessons from successes." – Focus group participant

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Appendix 3: Pedagogy Quotes

Cohorts-based learning

"[It would be helpful to have] pre-work, small group work with opportunities for connectedness, sharing in a comfortable environment, and walking away with a goal for how to institute the learning. Then the organization needs to help the person integrate it." – Focus Group participant

"Maybe less intensive [eg. full-day] training but more frequent with feedback and (cohort) based." – Focus Group participant

"A while back our organization contracted with an HR person who then worked with number of nonprofits to host shared HR and policy workshops. It was one person who was working with all the groups around shared needs, but was also consulting individually if particular organizations needed individual help. The ED at the time found it very helpful and the person did help with our policy needs. Sharing trainings and working with other EDs at same time was also helpful."

"I learn so much from stories. I'm not a good traditional learner. I like learning from doing and hearing how other people did things. I find it motivating and inspiring. You could tell stories about how people are doing things well. Where have partnerships formed? More examples of where it's happening across all these topics, that would be helpful." – Focus group participant

Collaboration and networking opportunities

"[It would be helpful to find ways of] networking people with the right people when they need each other. CSC could offer things that allow people to meet and discover each other. It could be content or focus groups, basically convening spaces where people can have the conversations they need to have to find the people they need to talk to." – Focus Group participant

"[I would appreciate] sharing stories and experiences across organizations, for example, meeting with someone and having the opportunity to chat. Meeting and discussing what is going on in their organization or sector around shared problems and struggles, and around innovations and success stories. Like shared experiences around funding. We all come up with different methods about how we can raise money, and sharing those different ideas about how to do that would be helpful to give people different ideas about how to address that for example. Funding especially for the big issues." – Focus Group participant

"The intangible things [like psychological health and safety] can be really hard. [We need] increasing conversations about those things. Networking opportunities could be beneficial. It would be great to increase the knowledge sharing we all have." – Focus Group participant

"We all strive to [collaborate] and know it creates better programs and opportunities, but we end up in room together and get excited but don't have a great partnership and collaboration framework to guide us as to next the step…. [It would be helpful to have an independent body or guide or framework to help move that conversation forward." – Focus Group participant

"One of the building blocks is strategic investment in human capacity, in the "backbone" role…. [It's a support] role so everyone can come to the conversation and bring their mandate to the table

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rather than doing it off the side of their desk. Organizations come because it's part of their mandate…. It needs to be worth it. How can there be backbone community facilitators where their role is to support that process? All the other organizations can bring their knowledge without having to do that backbone work." – Focus Group participant

"I'm not hearing people are looking for network sharing. I want to go and talk about how do we do x thing we need to do, for example diversify the board." – Focus Group participant

Mentorship and peer support

"[I would love] learning opportunities within sector through mentorship or peer support groups working in same aspect of a sector, for example finance. We could take the experience of people who have it and share it." – Focus Group participant

"Tap into people who have experience and aren't in the sector. Like can you give us two hours a week to support people? Tap into retired people or who moved into other places to provide mentorship and support." – Focus Group participant

"Also the 55-plus EDs. How might they be part of this bringing their 20 years of experience into the room?" – Focus Group participant

"About the ED network, we would come together but for me [I needed something different]. The ED role is weird because you can't go to people [because of confidentiality]. The circle idea was go to one another, but sometimes the things people need support around are not things you want to share in a broad group of people. Where could you go to get one-on-one support, more like a mentorship role?" – Focus Group participant

"[We need an] ED circle of practice to combat loneliness, to come together and learn from each other, and to have training and supports, around conflict resolution, HR, board relations, and so on. I hear people talk about not feeling safe in those conversations because it's a small community." – Focus Group participant

"There are a few organizations where people are going through horrendous stuff. How do you get support where you feel safe to share and get needed support around crises? Maybe larger focus groups, since people value learning from each other, but for serious issues, maybe they need to bring them up anonymously and then discuss as a group." – Focus Group participant

"[It could be something like entrepreneurs do where there are] 5-8 people who have gone through a training, where there are ground rules … there's confidentiality, you get together once a month to share something you're struggling with, and the group provides clarifying questions, and shares experience…. If you can establish a level of trust … it's a game changer in the face of isolation. People try to do things on their own and keep the problems inside, and it's a lot for one person to manage." – Focus Group participant

"Maybe it could be smaller groups with people not in similar services so people feel more comfortable. You want people to not feel they have to hold back from raising the issues. Like I didn't want to paint my organization in a bad light or see it taken out of context. You can't unhear things,

so you don't necessarily want things to be known in your group. Trust has to be there." – Focus Group participant

Sharing success stories

"How do we disrupt scarcity mindset? Many people have taken risks and grown and are thriving. It would be capacity building to hear from them…. How do smaller organizations build on the secret sauce of organizations who have gotten out of scarcity mindset?" – Focus Group participant

We don't always know who's out there we could partner with … who do good work with and who aligns with our mission and vision…. How can you help us identify other partners? [It would be great to have] networking and sessions where we can hear from other organizations and become more aware of what's in our community. I want to hear about other organizations doing really good work." – Focus Group participant

"I learn so much from stories. I'm not a good traditional learner. I like learning by doing and hearing how other people did things. It's motivating and inspiring. You could tell stories about how people are doing things well…. What are stories about partnerships that formed. More examples of where it's happening across all these topics would be helpful." – Focus Group participant

Experiential and student-centred learning

"We all talk a big game about innovation but we are not really doing it. It's important that we allow organizations to take risks and fail and we don't do that enough. It's important that CSC takes risks and if something doesn't work, then try something else. It's important that a propensity for risk and failure is built into the plan." – Focus Group participant

Tangible outcomes

"Policies and procedures are the bane of my existence and I want us to have templates. It needs to be part of capacity building [that we could show] up to fill them out in real time. The reward for participating is you are walking away with policies relevant to your organization. Everyone is stretched for time, so how can we think differently about reaching people and meeting them where they are?" – Focus Group participant

"There are pedagogical issues of how to support people to actually implement the learning. Eventually the training is back burner, so how do you support people to activate the learning? I did a series of workshops where we worked on one thing, then took it back to implement, then came back and talked about challenges of implementation. It helped to build capacity rather than a one-off workshop." – Focus Group participant

"[It would be great if we were] going to do strategic planning training and you will walk away with your plan or … policy manual for your organization…. The end result is a take away so I'm investing this time but will have something at the end of it. [It could be a series.] Like strategic planning allows us to look at the big picture so … [for example] then you go to next training to get the budget done. – Focus Group participant

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"I took a budget course at Dal one day a week and we had stuff to do in between. At the end I was coming out with an end result." – Focus Group participant

"[I would like] goal setting and strategic planning, policy development, but more of an educator model where you could submit something that could be modified, commented on, corrected, where you could get feedback." – Focus Group participant

"I need really tangible things like communication templates, a shared database of job descriptions, sample board reports, like best practice samples in shared database. Like for example, here are the competencies for a financial manager. We should use the resources that exist and share. You don't have to start with blank piece of paper." -Focus Group participant

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