



# **Building Community Capacity in Winnipeg's Inner City:**



## **Exploring The Learning and Resource Needs of Volunteer Boards of Directors in Non-Profit Organizations**

### **Community Summary**

By Lynn Skotnitsky and Evelyn Ferguson  
With Valerie Himkowski, Jackie Sokoliuk and Pat Wege



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The Community Summary and the full 99-page research report are available on the Institute of Urban Studies website: [http://ius.uwinnipeg.ca/wira\\_overview.html](http://ius.uwinnipeg.ca/wira_overview.html) .

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## About the Project Team

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**Dr. Evelyn Ferguson** is an Associate Professor of Social Work at the University of Manitoba. Her previous research and publications have focused on volunteerism, the delivery of childcare services in Canada, parent/consumer involvement, and the value of women's labour. She has extensive volunteer board experience in a variety of non-profit organizations. She is married with two children.

**Valerie Himkowski** is a 3<sup>rd</sup> generation resident in Winnipeg's inner city who has lived in her community her whole life. Married with one child, she is employed in the after-school program at the Norquay Community Centre. She sits on the boards of the North Point Douglas Residents Committee and the Norquay Community Centre, and is a past member of the Norquay School Parent Council. Additionally, she is an assistant editor/photographer of her community newsletter 'The Point'. She also sits on the Neighbourhood Housing Network group, and was a research assistant for the North Point Douglas Neighbourhood Housing Plan 2003-2008.

**Jackie Sokoliuk** has worked as a community development worker in Winnipeg's inner city for the past 15 years since earning her Diploma in Community Development from the New Careers Program. Since that time she has helped neighbourhood committees to start daycares, women's centers and resident/tenant associations, and has worked with volunteers putting together bylaws and constitutions, mission statements and personnel policies. Jackie has 25 years experience sitting on many different kinds of boards, most recently as a member of the advisory committee of the North Point Douglas Neighbourhood Housing Plan 2003-2008. She is of Metis descent and is married with 5 children.

**Pat Wege** has been the Executive Director of the Manitoba Child Care Association since 1998. On the board of directors of the MCCA from 1991-1997, she served 3 years as President. During that time she participated in many provincial and national projects including 3 years as MCCA's representative to the Canadian Child Care Federation Member Council; a member of the Child Care Sector Study Steering Committee which produced "*Our Childcare Workforce From Recognition to Remuneration*"; and Project Advisor to *Meeting the Challenge, Effective Strategies for Challenging Behaviours in Early Childhood Environments*. She is an ECE III, and worked in preschool child care for over 20 years, the majority as Executive Director at Machray Day Nursery Inc. Pat has grown children.



## ***Abstract***

This report explores community development and adult education with inner city residents who sit on boards of directors of non-profit organizations - in particular licensed childcare facilities, women's centers and family resource centers. Community organizations are important vehicles for development of neighbourhoods in terms of the degree to which they increase citizen participation, and stabilize and revitalize neighbourhoods through the creation of social capital (Gittel et al., 1999; Temkin & Rho, 1998). Drawing on a "community research as empowerment" framework (Ristock & Pennel, 1996), the project combined research and community capacity building by exploring the learning processes and identifying the resource needs of a sample of Winnipeg inner-city volunteers using an adult education model of experiential learning (Kolb, 1984; 1991). Data was collected through individual questionnaires, focus group/workshops and participant observation.

Our findings reiterate conclusions made elsewhere (Ontario, 1993) that volunteers are long term resources for the community worthy of significant investment. Further, the findings emphasize the importance of networks for facilitating community building; a consensus around specific skills, knowledge and attitudes volunteers believe they need for effective board governance; and particular features of an interactive training model deemed most helpful by participants.

In these non-profit organizations in Winnipeg's inner city (childcare facilities, women's and family resource centers), boards are predominately made up of women, many from Aboriginal backgrounds. In this study we found that approaches to and concerns about governance are strongly influenced by intersections of gender, race and class. Prevailing ideas in the literature tend to reflect a white, male-centered and middle class perspective. Our findings demonstrate that an emphasis on building social capital and acknowledging contextual dimensions of adult learning are highly relevant for this sample of board members.

We conclude with recommendations to individual board members, to boards of voluntary organizations and to provincial and federal policy makers to more effectively support and strengthen the abilities of inner-city volunteers engaged in non-profit governance. Recommendations include a budget line for board expenses, provision for consultants to work with boards, conflict resolution training, a multi-media resource package, and the development of a board training and networking series. There is strong support for an interactive, community building educational approach that is culture-, gender- and class-sensitive, is responsive to the specific interests of participants, and capitalizes on and deepens existing networks while fostering the development of new networks and co-mentoring relationships.

## Table of Contents

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<i>Introduction and Rationale</i> -----	1
<i>Findings</i> -----	4
Who Were the Participants?-----	4
The Critical Role of Networks and Social Capital-----	4
Knowledge, Skills, and Attitudes for Effective Board Governance-----	8
Challenges Faced by Inner-City Board Members-----	10
Designing Learning-----	15
Benefits of an Interactive Learning Design With a Focus on ‘Learning to Learn’-----	17
What could have improved the sessions?-----	18
Limitations of Kolb’s Model of Experiential Learning-----	19
<i>Recommendations</i> -----	21
Recommendations to Individual Board Members-----	22
Recommendations to Boards of Non-Profit Organizations-----	23
Recommendations to Federal and Provincial Policy Makers-----	24
<i>Conclusions</i> -----	26
<i>Appendices</i> -----	28
Appendix A – Glossary of Terms-----	28
Appendix B: Resources for Boards-----	30
Books, Articles, Reports & Guides on Board Development-----	30
Web-sites-----	31
Training Programs & Other Resources-----	31
Political Representatives-----	32
Funding Sources for Board Development Activities-----	32
Appendix C: Knowledge, Skills and Attitudes for Effective Governance (complete list)-----	33
<i>References</i> -----	38

## **Introduction and Rationale**

*Board members are as conscientious and as giving a group as one could ever hope to find. [They] interrupt their personal and occupational lives to support something in which they believe... Their personal drive has accomplished formidable tasks. Their perseverance has surmounted seemingly intractable barriers. Their patience has outlasted drudgery. Their generosity has made the impossible possible...*

*Though possessed of ultimate organizational power, the governing board is understudied and underdeveloped. Here we confront a flagrant irony in management literature: where opportunity for leadership is greatest, job design for leadership is poorest.*

John Carver, Boards That Make a Difference

The work of volunteer boards of non-profit organizations makes a significant difference to the well-being of our citizens and our communities. Non-profit organizations are important vehicles for development in low income neighbourhoods. Scholars have examined community organizations in terms of the degree to which they increase citizen participation, enhance community capacity and stabilize and revitalize neighbourhoods through the creation of social capital (Gitell, et al. 1999). Yet board members are largely left to their own devices in terms of ongoing leadership and skill development. Moreover, boards vary dramatically in terms of the resources available to them and the privileges afforded them.

In June 2000, the Federal Government launched the Voluntary Sector Initiative (VSI), which has focused on the voluntary sector as one of the three pillars of Canadian society, equal in importance to the public and private sectors. The federal government is investing \$94.6 million over five years in 5 key areas, including developing new knowledge, skills and means for voluntary organizations to respond to Canadians' needs (web-site [www.vsi-isbc.ca/eng/about.cfm](http://www.vsi-isbc.ca/eng/about.cfm) accessed 03/09/02). Within the VSI, the Panel On Accountability And Governance in The Voluntary Sector (1999) has identified

## *Enhancing Boards Community Summary*

the need for capacity building as the first step toward better accountability and governance in Canada's voluntary sector. The problems of organizational governance echo across the sector:

*...they are largely due to the nature of volunteer boards, who often have limited time to devote to the task, are poorly informed about the nature of their responsibilities in the first place, or do not have access to the right tools to improve their own performance. Such problems are compounded ... [by] the pressures of rising demands for services and shrinking resources (p. 22).*

In this study we explore elements that support the participation, learning and development of volunteer board members in inner-city community organizations in Winnipeg. In particular, we look at licensed childcare facilities, women's centers and family resource centers; organizations whose largely female volunteer directors are often consumers of those same services. The 4 primary objectives of the project were to:

- Explore the knowledge, skills and attitudes required for non-profit governance
- Enhance participants' knowledge of their own learning processes
- Increase the density of networks / build social capital
- Develop policy recommendations for optimizing learning for boards



## *Enhancing Boards Community Summary*

There are 4 terms we will use throughout this report that merit explanation: **social capital, community capacity building, community development and community building**. In this project, we use **social capital** to mean the many relationships and networks of people accessible to one another, with common interests and goals, who can share skills and resources. Because our purpose is community building, the notions of 'building networks' and 'building social capital' are often used interchangeably.

**Community capacity** refers to all of the resources that can be brought to bear on a community's process of working towards their desired future, including financial resources, technology, people, skills, plans, networks of relationships and shared commitment (Frank & Smith, 1999).

**Community development** is an ongoing process, and an approach, that draws on local wisdom, culture and traditions as it supports opportunities for people and organizations to connect, to build and to strengthen their communities. The goal of community development is improved quality of life for everyone.

**Community building** is a term that encompasses a whole array of activities that support community development. The 'people and skills' part of community capacity building involves ongoing learning.

"In order to do their work, voluntary organizations need resources, infrastructure, skills, knowledge, support and understanding" (Panel on Accountability and Governance in the Voluntary Sector, 1999, p.iii.).

This project integrated community capacity building and research. As researchers, community adult educators and feminists, we believe that adult education has an important role and responsibility in transformative social change. The education approaches we have used are learner-centered; culture-, gender -and class-sensitive; and consider the multiple ways that learning takes place in non-formal education contexts. Data for the research was collected by means of audio taping three workshop/focus groups (drawn from 53 non-profit organizations), each meeting twice for 7-hour sessions.

## *Enhancing Boards Community Summary*

Data was also collected through individual questionnaires and participant observation.

We hope that the findings of this project will contribute to the Canadian literature on board development, and highlight some of the differences among boards in terms of the resources available to them and the privileges afforded them, while adding an explicit adult education perspective in terms of approaches to service delivery. We hope to draw attention to the importance of honouring and valuing the hard work and commitment of volunteer board members and to supporting their capacity building in ways that make the most sense to them. Additionally we hope to highlight some of the differences in women's approaches to developing leadership capacities within the community. Finally we want to acknowledge and draw on the strength and contributions of Aboriginal perspectives which have much to offer in understanding how best to build our communities.

## **Findings**

### ***Who Were the Participants?***

This sample of inner-city community board volunteers was made up of 92% women and 8% men; 56% Aboriginal, 40% white and 4% visible minority. The average age of participants is 41 with a range of 27 to 60 years of age. Over half are living with partners (64%); the remaining 36% are single, divorced, or widowed. In terms of education, 44% of the group has 15 to 16 years of schooling, equivalent to a university degree. Another 16% made up each of the groups 9-12 years, 12 to 14 years, and 16 years or more. Four percent of the participants have less than 9 years of schooling. The median household income before taxes for this group is \$30,000 to \$39,000 and 56% are living at or below the poverty line. The total current and past board tenure of the 25 participants in the study is equal to 173.5 person years, reflecting volunteer contributions in 52 different community organizations over the last 10 to 30 years.

### ***The Critical Role of Networks and Social Capital***

This study revealed 'networking' and 'building social capital' to be critical resources for learning for this sample of participants. A **network** can be understood as "an extended group of people with similar interests or concerns

## *Enhancing Boards Community Summary*

who interact and remain in informal contact for mutual assistance or support” (American Heritage Dictionary, 2000). Networks are the basis of social capital. A term borrowed from economics, social capital captures the ‘value-added’ of trust and reciprocity that comes from active membership in a network. We think of financial capital as monetary resources; we can think of social capital as the value of participation that money can’t buy.

We were pleased and surprised to discover, upon analysis of the demographic information participants provided, that a high degree of network density already existed within the pool of participants, well beyond what we had initially presumed. The 25 participants are presently or have been connected, remarkably, with at least 52 different non-profit organizations within the inner city<sup>1</sup>.

The presence of existing networks enabled us to ‘take a good thing and make it better’. We found the participants needed little encouragement to interact with one another. As several people commented, the opportunity to connect with other board members and discuss concrete issues of concern within a climate of trust was highly important to them.

*“I think the thing that really is important is getting to know more people. The networking process.”*

*“I like to just get ideas from other people - it’s just so important to network”.*

Participants having the opportunity to share their background experience and their gifts was a good way for people to get to know each other and ultimately to become aware of their collective resources, the beginnings of what McKnight & Kretzmann (1998) refer to as ‘asset mapping’. The following exchange is rich in micro examples of the many ways that building a group and a network can happen. A participant (P1) is sharing information about herself (‘breaking the ice’), others (P2, P3, Fa) are affirming and being supportive to her, and there is lots of humour.

*P1: ... well I don’t have many talents or gifts (laughs).*

*P2: Oh but you **do!***

*Fa: (echoing); Oh, but you **do!** (group laughter)*

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<sup>1</sup> Some respondents indicated there were more organizations on whose boards they had served, but they didn’t name them or say how many. The ‘52’ reflects the number of organizations that were named.

## *Enhancing Boards Community Summary*

*P1: (Laughing) I know how to shop real good. (Laughing) I know how to make people laugh, I guess!*

*P3: You'll have to take **me** shopping!*

*Fa: What would you say is a gift you currently share with your board?*

*P1: I always give them stuff to talk about, like if a problem comes up, is that fair? Do we have to do things that way? I'm always looking at different ideas and exploring different angles of things.*

*Fa: That's good, that's definitely good. Thanks [name].*

*P1: You're welcome.*

As discussions unfolded throughout the sessions, we noted how participants linked their comments to points made earlier by other participants, often referencing and building on what others had to say. It gave us the sense of 'weaving a tapestry'. Here, another participant is sharing her gifts with the group and, in an affirming way, relating back to the speaker (P1) in the example above.

*And my main talent that I share with my community is: I'm like Radar from M.A.S.H., I have tons of ideas! I go to bed at night thinking of things and ideas (group laughter). When someone needs something I can either find it or think of something that can take its place, so that's probably one of my greatest talents (laughter). So, **I know how to shop** [looks at P1], not only for myself, but for all kinds of things, fundraisers and you name it (group laughter).*

There were many features of the participants' behaviours that promoted relationship development, group bonding, and the deepening of the network. There was extensive use of humour and we observed people expressing empathy, admiration, and inspiration towards other members. As participants shared their challenges and concerns related to their boards, others offered stories of what worked, often pointing out resources and offering advice.

People often think they don't know how to network, or they feel awkward about doing it. But that's what they are doing every time they connect with someone they don't know well in conversation and discover interests they have in common. Gilchrist (2000, p. 272.) points out that "informal processes are just as important (and often not so risky or intimidating) as formal

## *Enhancing Boards Community Summary*

occasions in providing the means and the motivation for networking”. Keeping sessions light-hearted helps to take the pressure off people.

The networks within the community are the foundation for the creation of social capital. “Community networks hold a repository of common sense, experiential knowledge and shared wisdom (often mediated by women)” (Gilchrist, 2000, p.266.). They provide opportunities for active on-going learning. As one participant from a women’s resource centre said:

*I think that a common thread is really important here, to feel comfortable to be able to share. To me what works is sharing, hearing other people’s stories....and [having] a chance to meet childcare board members. So to me, that’s good networking.*

Networks are gold mines for peer mentoring and problem solving, mutual support, learning partnerships, and other benefits. Two participants remarked on the importance of networks as a source of inspiration:

*P1: When F. was talking about how good resource centers are for communities, I’m hoping that in a few years somebody will be saying that about **our** centre.*

*P2 (from the same board): Yes, and, I was just speaking with F. during break time, and so much of what it sounds like they’re doing at \_\_\_\_\_, sounds like something that **we** should really look into exploring for our centre. That’s energizing and stimulating and rife with possibilities! The ideas that get generated from talking to each other.*

Discussion and interaction appeared to be a key element in participants’ learning, both in terms of the talking and listening (ie. learning process), but also in terms of learning about what other boards do, what their strengths and challenges are, and how they solve specific problems (ie. content). In essence, ‘working one’s network’ can be understood as an ‘interpersonal learning style’. It is a method for getting information, and it can often be a very pleasant experience interacting with someone else.

*I feel I met valuable people, good contacts and got very useful info regarding specific people to talk to and where to go for the info I seek to become a better board member /asset to community.*

Finally, networks were understood as a significant learning resource, as this participant’s comment illustrates:

## *Enhancing Boards Community Summary*

*Something I'd like to learn today is to tap into the resources of the rest of the boards....*

Using networking as a learning resource leads to potentially rewarding, reciprocal relationships. There is a holographic quality to explicitly using networking as a strategy for community capacity building: Whatever builds relationships in an inclusive way, also builds the group as a learning and resource network for itself. Each individual is also a node connecting the present group to an exponential number of other people outside the group who are resources and members of their own networks.

In summary, tapping into existing networks and promoting their further development was important as both a **community building** and a **capacity building** strategy. Board members were significant learning resources for each other. Consequently, networking can be an efficient approach to community capacity building. There are only so many training dollars available, and the collective knowledge and experience of these volunteers is a rich resource from which to draw. We conclude that any program that promotes on-going learning through co-mentoring and network development, therefore, will have a ripple effect throughout the voluntary sector.

### ***Knowledge, Skills, and Attitudes for Effective Board Governance***

Within the training sessions, participants developed a comprehensive list of 67 types of Knowledge, 103 Skills and 54 Attitudes they deemed significant for effective governance. They then prioritized the items and created personal learning goals related to the skill-sets most relevant to them. When data from the 3 meetings were brought together, the consistency among the 3 prioritized lists was immediately evident.

For example, with the KNOWLEDGE set, each group said “understanding the mission, philosophy and values of your organization”, and “knowing the policy manual and understanding the roles and expectations of the position” were key. Within SKILLS, some of the common themes deemed essential were communication skills (speaking and listening, sharing ideas constructively, influencing others, etc.) teamwork, planning and goal setting. Among the ATTITUDES of most importance were “commitment”, “remembering who you represent”, and “respect for others”. These top priorities are summarized in Table 1.

	<b>Group 1</b>	<b>Group 2</b>	<b>Group 3</b>
<b>Key Knowledge for Effective Boards</b>	<ul style="list-style-type: none"> <li>Understanding the roles and expectations of the Board and the Executive Director</li> <li>Knowing the policy manual and knowledge of policy development</li> <li>Knowing the needs of your stakeholders</li> <li>Philosophy, goals and objectives of your organization</li> </ul>	<ul style="list-style-type: none"> <li>Know your organization (philosophy &amp; goals) and your membership</li> <li>Know your roles and responsibilities (legal, financial, insurance, etc.)</li> <li>Know the players: funders, political allies, policy makers</li> <li>Know how to evaluate your work</li> </ul>	<ul style="list-style-type: none"> <li>Know the Board's roles and responsibilities (legal, financial, insurance, etc.)</li> <li>Know the mandate, mission, vision, goals, services, programs and policies of the organization</li> <li>Financial knowledge: policies, budgets, how to read financial statements.</li> </ul>
<b>Key Skills for Effective Boards</b>	<ul style="list-style-type: none"> <li>Communication skills: ability to express yourself effectively, openly and positively</li> <li>Keeping people interested and motivated</li> <li>Teamwork</li> <li>Running meetings and staying on topic</li> <li>Problem-solving skills</li> <li>Planning, researching, and setting goals.</li> </ul>	<ul style="list-style-type: none"> <li>Managing the dynamics of the Board team</li> <li>Communication skills, presentation skills, public speaking</li> <li>Defining and working toward goals</li> <li>Community capacity building (helping others develop)</li> </ul>	<ul style="list-style-type: none"> <li>Creating an environment that's conducive to participation / helping others; team skills</li> <li>Communication skills – VERBAL (listening, public speaking, constructive Board/Staff communications) and WRITTEN (writing letters, grant proposals, keeping minutes accurately)</li> <li>Networking/ tapping into your network.</li> </ul>
<b>Key Attitudes for Effective Boards</b>	<ul style="list-style-type: none"> <li>Commitment</li> <li>Willingness to learn new things</li> <li>Empathy</li> <li>Sense of Humour</li> <li>Remembering who you represent</li> <li>Professional Attitude</li> <li>Fairness</li> </ul>	<ul style="list-style-type: none"> <li>Being willing to work as part of the team</li> <li>Being respectful of other cultures and of people's differences (including lifestyles)</li> <li>Understanding that the Board exists to serve the community</li> <li>Persistence and strength to carry on and to achieve your goals</li> </ul>	<ul style="list-style-type: none"> <li>Honouring, valuing, and representing the community you serve (your stakeholders)</li> <li>Being committed to the organization's mandate</li> <li>Commitment to showing up for meetings</li> <li>Empathy &amp; respect for people's safety issues and boundaries; confidentiality.</li> </ul>

**Table 1: Summary of Knowledge, Skills and Attitudes for Effective Board Governance**

## *Enhancing Boards Community Summary*

We found that, collectively, board members knew what was fundamental to good governance, and they knew what they wanted and needed to learn. In fact, the emphasis was just as much on “how” as “what”. We found that group interaction drew each person’s wisdom out in a way that addressed their very specific learning needs and built relationships at the same time. In comparison with some of the normative literature on board development, we found that there were distinctions, based on class, gender, and cultural differences, in what is valued, what investments board members feel entitled to, and how the work gets done.

### ***Challenges Faced by Inner-City Board Members***

In the context of discussing the “Knowledge”, “Skills”, and “Attitudes” required for effective governance of non-profit organizations, the participants in this study shared a number of issues, concerns and challenges they have experienced in their capacity as board members. These clustered around 10 main themes, some of which related to various needs for community capacity building, and others related to problems inherent in the system.

1. We observed that **board work doesn’t happen in a vacuum**. Many board members are dealing with considerable challenges in their personal lives that make their volunteer commitments seem all the more remarkable. We were struck by the situations that people were dealing with in the backdrop of their lives while carrying out their volunteer commitments. Although these comments were made in passing (ie. not a focal point of the discussions), and not everyone made personal disclosures, the overall sense we came away with was that their commitment and continued participation in their communities is remarkable, given the demands on them in other areas of their lives. For example, there were sick relatives:

*I’m going through a very hard time right now. It was very hard for me to come here. I have a very sick sister in the hospital right now...I’ve been spending a lot of time and have a lot of family [here] and I was just telling J I’m glad to be here because I have so much going on at home... I have tons of people at my place cooking and cleaning and chasing kids (laughter). Actually, it will be a break for me to be here today.*

Another participant worked all night at a crisis unit before attending the first meeting, and arrived tired and stiff and sore. During the course of the project, one woman left her abusive partner and was living at a women’s



## *Enhancing Boards Community Summary*

shelter with her 3 children. Several participants commented on how inspired they were to see that she continued to attend our meetings, in spite of what we imagine would be extreme stress in her life.

2. Two of the most specific (and we believe, easily remedied) **barriers to participation** are **transportation problems and insufficient childcare**. As one of our participants stated:

*[Attending board and community meetings] is really good when you have a vehicle, but I know that if I had to bring my kid to someplace this far away ...it would have taken at least two buses to get here, if I didn't have a car. But I had the car.*

There is a tendency in our society to not take into account the time and extra care children require. It's invisible, 'women's work'. Children (depending on their ages) need to be home, bathed and in bed so that they get at least 10 to 12 hours of sleep per night. Dragging them out to evening meetings, across the city and back on public transportation, is not easy in good weather, let alone during a Canadian winter. It's hard on them and it's hard on the parent. Moreover, many people have a very limited social life because they can't afford to go out, never mind pay for childcare in order to volunteer (Reitsma-Street et al., 2000).

These same challenges also make it hard for volunteers to take advantage of further training and development opportunities, as these women lamented:

*P1: Well, I started at the board last September and there have been three of those orientation meetings [by the Child Day Care office]. And I've missed all three because my husband was either working, because he would teach at night, or they're always in the evening on a weekday...*

*P2: Now there's an oxymoron, eh? There's an orientation on board development for a daycare, and you can't go because you don't have childcare.*

*P3: And I've [also] tried three times. I missed the last meeting, there was just one last week, and I couldn't go.*

As Mailloux et al. (2002, p.iv.) point out: "Women's volunteer work in formal situations only scratches the surface of what women contribute [to the economy] without pay, on a day-to-day basis". Our findings reinforce their conclusion that the voluntary sector "must do more to promote women-friendly practices to enable females among volunteers and staff to participate without incurring extra costs".

## *Enhancing Boards Community Summary*

3. We observed that, like in many boards, the participants in this study grappled with **tough decisions, sensitive topics, and ethical dilemmas** that involve balancing collective and individual needs within a moral framework. For example, participants raised a number of complex problems they had to make decisions about, running the gambit from substance abuse to sexual harassment. Inevitably these decisions involve wearing more than one hat and reconciling competing values, such as whether a child with serious behaviour problems should be removed from a daycare:

*Also to make decisions, like sometimes it's so hard, if you have to get a child removed from the daycare. You all have to agree on it and be able to say just "for the safety of the other kids".*

Cases such as the one above are often the most 'gut-wrenching' because board members know the childcare system is underdeveloped, waitlists are long, and their decisions may result in a child 'falling through the cracks'. The implications may well be that a mother has to quit her job or schooling because she can't get alternative care for the child; meanwhile, the behavioural problems may go uncorrected.

One participant's comment captured the ambivalence of having to develop policy around sensitive issues. It's one thing to set policy on an inner-city board when you live across the city, but another when you live and work with the people who are impacted by your decisions:

*...and being able to sort those things out and if you're wearing two hats and you all live in the same community like it's very, very, difficult.*

4. Board members described several challenges related to **understanding their roles as board members**. Many expressed a sense of feeling unprepared for what they were getting into, and of having little guidance in their positions, like the following:

*It was my first time ever being on a board, like I've served on committees, but I've never been on a board before, so it's something new and it was really scary. And ... the chairperson last year couldn't be there; I found out 5 minutes before the annual general meeting, so I ran the annual general meeting and it was like holy smokes! That was scary! (group laughter).*

Understanding and negotiating the respective roles of the board and the executive director was challenging for some participants. Although some

## *Enhancing Boards Community Summary*

people reported having a good, mutually supportive relationship with their director, just as many people talked about their discomfort with some of the power dynamics between the E.D. and the board.

5. This led to challenges related to **evaluating the performance of the Executive Director**, in which participants quite unanimously voiced that they could use greater guidance. As voiced by one participant:

*It's uncomfortable for a lot of boards and I think that might be one of the reasons why people often avoid doing the evaluation process. Even though it's our responsibility as board members to evaluate the director.*

6. **Managing conflict** was another common theme of discussion when it came to challenges, especially when cliques formed, or when differences of opinion were not encouraged or respected. Some people had been ostracized for being the 'dissenting voice'.

*This shouldn't be happening that nobody listens to you. And I think that's the worst thing that some board members do is they sign up together, and to hell with the other board members. And you become alienated, isolated, criticized, just because you have a different opinion.*

7. Some of the **conflicts** that people experienced as 'personal' are actually **structural contradictions within the system**. In Manitoba, in licensed childcare, for example, parental "voluntary" participation on boards is legislated. A minimum of 20% of each board must be made up of parents, and often the vast majority of childcare board positions are held by parents. This structure creates a situation whereby consumers of the service (parents with children in daycare) are also in the position of ultimate responsibility in the organization, and in fact, have formal authority over the staff. Parents who get involved on boards of directors are rarely aware that the parent board/staff relationship is one of a structural conflict of interest, which can often lead to difficult situations. The following account is a classic example of one of the risks of having childcare delivered within this kind of model, where board members felt virtually 'held at ransom' because of role conflict:

*[The E.D.] would say "This is what the pay scale rate should be", and he would get these huge pay raises every single year. And, when a couple of us thought it wasn't fair - you know the aides were getting \$7.50 an hour - and we're like "Well, can't we at least give them \$8.00 an hour?" ... "Oh, no, no, no", but wanting these huge pay raises himself. And he would start to*

## *Enhancing Boards Community Summary*

*bully and threaten that he was going to quit as the director of the daycare. “And if we don’t have a director, the daycare could close down” and all this kind of stuff. And as a single parent with kids in that daycare, I keep my mouth shut because I’m a student and I don’t have alternative childcare. And I can’t take the time to find another daycare; it’s not that easy. In the middle of the year, and there are no daycares that have spots available. So then you just keep your mouth shut.*

Whereas parental involvement on boards speaks to the ideal of democratizing services, at the same time board members are vulnerable to power dynamics, such as above, that show how the formal structure is inherently contradictory. On one hand, the director is legally answerable to the board, but the process can get co-opted if there is an informal source of power. On the other hand, parents are in a position of vulnerability, as they worry about the continuity of their children’s care at the centre.

8. Another of the challenges faced by board members is a heavy onus on volunteers for **fundraising**. Some participants had experienced a protracted sense of fragility from having to operate from grant to grant on a yearly basis. One of the heaviest burdens on volunteers in the childcare sector in particular, is trying to raise money for buildings and play structures, since there is no provision for building childcare facilities within the provincial budget.
9. Other challenges that participants raised related to the month-to-month “**job of governing**” including unproductive meetings, recruiting and retaining volunteers and building commitment. For instance, as one woman stated:

*One of the things we’ve experienced on our board is that there’s people willing to be on absolutely every committee, but don’t do anything! (Group Laughter). A lot of people saying they will do stuff and it doesn’t happen.*

10. Finally, an on-going challenge, particularly for women with children, related to juggling numerous responsibilities and **maintaining balance in their various roles**. Balance is also a key message in the teachings of the Medicine Wheel. Many Native women have been leaders in the work of healing their communities from the effects of colonization. Keeping a balance means that the caring work done by women includes caring for themselves.

## *Enhancing Boards Community Summary*

Overall, reviewing these challenges allowed us to see the powerful constraints imposed on this sample of board members and also their tremendous commitment and motivation to build their communities.

### ***Designing Learning***

Turning now to the training aspect of this project, from a content perspective we were exploring 'how we learn' within the domain of volunteer board experiences and governance issues. However, from a process perspective we employed specific strategies to put us in a microcosm of board life. This was done with the intention of **modeling some of the communicative and interpersonal skill-sets of governance**, such as: positive norm setting, respectful communication, appreciation for diversity, creating a climate of trust, making room for different viewpoints in group discussions, building bonds and nurturing instrumental relationships, self-reflection and learning from our experiences, developing political awareness and critical inquiry, being transparent about agendas, balancing individual and collective needs, and respecting the context of people's lives.

Because not everyone is used to working in groups, we shared the following **guiding principles** at the beginning of sessions, making values of inclusion and respect for multiple viewpoints explicit<sup>2</sup>. They included:

- Everyone has wisdom (regardless of their job experience or education levels).
- We need everyone's wisdom for the wisest result.
- There are no wrong answers.
- What we can accomplish together is better than what any one of us could do alone.
- Everyone has the right to be heard, and the responsibility to listen to others.
- Participation "looks" different to each person. Some of us are verbal, some of us are quiet observers. We respect the different ways people choose to participate.
- We agree to keep confidential information in the group.

**Our project used a perspective that focused on learning to learn, self-knowledge, and collective knowledge.** David Kolb's (1991) Learning Style Inventory was used to explore the individual learning styles of participants, and discussion of the inventory was utilized as a strategy for group building. We used small groups and scheduled 2 sessions per group, approximately 3-

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<sup>2</sup> Adapted from the Institute of Cultural Affairs Canada (Stanfield, 1997).

## *Enhancing Boards Community Summary*

4 weeks apart. The size and spacing of meetings mirrored that of board meetings.

Using a Learning Style Inventory in the context of exploring the requirements for, and challenges of, board governance work enabled people to reflect on their learning processes while trying to solve real-world problems. The use of the Learning Style Inventory (LSI) showed great potential and was useful for a variety of inter-related purposes, highlighted below.

**Icebreaker:** The Kolb Learning Style Inventory provides the 'topic' for people to begin talking about themselves and how they best like to learn. It gives them a framework to begin getting to know each other better. One participant made this observation:

*I like it [exploring our learning styles], and first of all I thought when we got together and compared the way we learned, that was an ice breaker too. There were some funny parts about that (laughing) and I like it that way in the group.*

**Increased self-knowledge:** Increased knowledge of the self is often accompanied by increased self-confidence, especially important for women, given our socialization (Belenky et al., 1986; Arapakis, 1993). One participant pointed out how she had begun to more consciously recognize her own strengths as a result of exploring learning styles.

*At the time I didn't realize that...that's my forté, that's what I do well: to mentor, to handle conflict. I do that well and I've never taken credit for that before, so, I think the other thing that I'm going to use [this for] is to give credit where credit is due, even if it's to myself and to say: "you know what D? You did that O.K."*

**A method for affirming people's diversity and the different ways they might learn and/or solve problems:** People gained awareness of their own talents and strengths as well as those of others. The emphasis was on "there is NO ONE RIGHT WAY" to be. This was reported by participants as leading to greater self-acceptance as well as increased appreciation for differences.

*I think you did very good about telling people that there's no right and there's no wrong [learning style]. However you are is ok.*

**Team building:** Once people understand the value of different learning styles and the different ways people contribute, they can begin to consciously map the resources within their group and draw on people's

## *Enhancing Boards Community Summary*

particular strengths. People begin to feel valued for their unique contributions, and at the same time there is a shift to a more transcendent perception of the group's value. There is the potential for experiencing the whole as "greater than the sum of the parts". As participants began to bond as a group, we pointed out the potential for using this or similar models with their own boards.

*Excellent modeling in how to manage a group of people. It was really useful to think about diversity in a group in terms of a model of how learning happens.*

**Cultural parallels.** Another benefit of using Kolb's model of experiential learning (in particular) is its many parallels to the Medicine Wheel. For example, like the Medicine Wheel, Kolb's model is a circle with 4 quadrants that emphasize cycles and phases of learning, an emphasis on the strengths each phase has, and the many complimentary talents people bring to situations. Just as with the Medicine Wheel, the focus is on people's strengths and skills as well as on their instinctive tendencies to strive for balance. One participant commented on these interesting parallels between the models:

*Just briefly, where I work we have an evaluation that's based on the medicine wheel concept and this [Kolb] is pretty much that concept as well. It's pretty close... Our evaluation is based on gifts of each of the directions that we carry, and that's how we are evaluated during our evaluation. It's really not a negative thing, it's really a very positive thing because you look at all those gifts and you build on them because everyone has gifts in all four directions. As well here we all have gifts. And how do you learn and sometimes you're more on one side, you know, um one direction as opposed to the other, but how do you start building and balancing that wheel?*

Although Kolb's theory of experiential learning and the learning styles inventory has several benefits, it is not without its limitations, which will be discussed in a later section.

## **Benefits of an Interactive Learning Design With a Focus on 'Learning to Learn'**

Another of the research objectives was to explore the extent to which the participants thought that their learning had been enhanced by the various design elements. We were interested in knowing what aspects of this model

## *Enhancing Boards Community Summary*

were useful to participants, since these would feed directly into considerations for training design and influence policy recommendations.

### **The elements of the training model deemed most beneficial included:**

- Interaction with peers, opportunities to network
- Opportunity to discuss current issues and concerns
- Exploring as a group the knowledge, skills and attitudes for effective board governance
- Opportunity to hear multiple viewpoints and problem solving strategies on issues of interest
- Development of trust within the group, a climate of safety for learners, and affirming diversity
- Opportunity to develop self knowledge and self confidence
- A self-assessment instrument with team building applications
- Humour, mixing up activities, being able to move around
- Flexibility with schedules and agendas
- Having a workshop 'series' with time to apply the learning between sessions and reflect
- Being respected as adults with multiple responsibilities – no shaming!
- Feeling pampered, worth “investing in”

### **What could have improved the sessions?**

The challenge of doing training and research in the same project requires balancing the needs for learning with needs for collecting data, and ultimately there are trade-offs for either. Although we were unable to address all of the training needs in this study, we asked participants to tell us what would have improved the sessions for them, with an eye on future design considerations. There were four main themes:

- 1) Spend even more time discussing board concerns.
- 2) Role-plays would help in applying the learning.
- 3) Help us educate our boards.
- 4) Have slightly shorter sessions, spaced 2 to 4 weeks apart.

Overall, what would improve the training relate to application, application, application! This is consistent with adult education literature that points out the adult learners are problem-solving beings whose learning is most



## *Enhancing Boards Community Summary*

effective when it is situated in the real world (Abbott & Ryan, 2001). There is a time and place for theory, but when you are in a proverbial swamp full of alligators you just want to know how to survive, not worry about how or why swamps are created and maintained. And that makes sense: these volunteers are in the trenches and they are most interested in programs that are practical and have immediate application.

### **Limitations of Kolb's Model of Experiential Learning**

Overall the feedback about the use of the Kolb Learning Style Inventory was very positive. The majority of participants found that it was useful to explore their learning styles within the context of board development. However, Kolb's model is not without its limitations, which have been documented extensively over the years (see bibliography of research on experiential learning theory and the learning styles inventory, Kolb, 1991). Here were the main limitations in relation to this project:

**Kolb's model of experiential learning is a function of the time and social location it comes from.** The model is too academic for non-academic circles and thus takes significant time to "unpack". Terms like converger, diverger, accommodator and assimilator are not user-friendly for a general audience. It requires a considerable investment in time for people to adjust to the language of the model and begin to work with it in a meaningful way.

**The instrument raises questions about accuracy, validity, and reliability.** The inventory itself has directions that are counter-intuitive, increasing the potential for misinterpretation if the form is filled out in a way that differs from the intentions of the author. It asks a number of the same questions with variations on the wording, leading a respondent to feel somewhat manipulated. The following excerpts of transcripts illustrate how 2 participants dealt with these points:

*P1: I just recall that as I was reading these questions, I read the first few and then I figured "I can see where they're going with this". I remember feeling kind of resistant, and I think it probably skewed some of my answers like, "No, I'm not going to put a 1 there again!" (Group laughter). Fa: You can't trick me! (Group laughter). P1: Well, it actually felt like I was being pegged, and I know that I resist that. And I had the experience with some other...questions, and as I read them, I thought, "I don't even know what that means really", like it's so brief, and I thought "well, what I'm thinking it means could be very different than what Kolb intended when he put it down".*

## *Enhancing Boards Community Summary*

*P2: I did the same, but unlike [P1] I didn't try to resist. In fact, I did the complete opposite where I thought, "Why am I being asked the same question over and over again?" and I must be sure to respond similarly so that I... (Group laughter) ...I better do the same thing, otherwise, they're gonna think I'm psycho. Right? (laughter). Fa: This is what all these tests and models have done to us, it ends up we feel like they're playing with our minds. (Group laughter). P2: You catch on very, very quickly that you're being asked the same question, sixteen different ways. So, it's how you respond to it, but nonetheless, the results I know were right, because that's the thing that I got out of it. The result was right, because that is who I am, that is how I learn, and I know it.*

**The facilitator has an important responsibility to de-construct the model to circumvent some of its oppressive tendencies.** It's very important to acknowledge and to process participants' resistance to these elements of the instrument. Especially in communities that have experienced marginalization and/or colonization, it would be easy to understand people's suspicion that this might be another tool of oppression. One participant expressed the sense of caution the tool raises:

*In the end, the desired result of it, and this whole idea of models... I think models are really useful, because they give our simple brains a way of making sense of the world, but I think the tendency is, once we create models, then we try to fit things into it and, although you've been saying so many times that we use all [skills from all quadrants], and that the model needs to be flexible [to us, and not the other way around], we have to be very careful with the interpretation.*

We found it very important to encourage people to openly reject aspects of the model that did not ring true for them (or the whole thing, if that were the case), continually reaffirming that each person's autonomy and self-identity are more relevant than whether or not the model 'fits'.

It's important to reiterate to people that there is no one right way to be. It's equally important to offer the tool as a self-assessment instrument and to emphasize that people should only take from it what is useful to them or feels true for them, and not feel that they are stuck with a label. Moreover, people change over time.

The model is also useful in helping us understand the behaviour of others through general patterns among learning styles. However, another caveat for facilitators and learners is that it's important not to pigeon-hole or stereotype

## *Enhancing Boards Community Summary*

other people. There are no “pure” types; we all use all of the skills in all of the quadrants of the model to a lesser or greater extent.

**Kolb isn't for everyone.** This model, like any self-inventory or learning model, doesn't appeal to everyone. In fact, in this study 2 participants did not feel that a discussion of learning styles was of benefit to them.

*What type learner I am, although interesting, did not really provide me with the information I was expecting to come away with.*

*I found that Kolb just didn't work for me. Like, I still found it interesting but I haven't made the connection yet to boards. I guess when I'm thinking about all the things I'd like to know, issues and current situations that we're in, I guess thinking about learning styles doesn't seem to be getting to any kind of blatant (noise in background). But, I really like the idea of having a model and thinking it through, to do something with it. It would be useful to have some type of model, but (noise in background) [perhaps not this one].*

Whereas many appreciated the model for the “self-knowledge” aspect, some found it hard to make the connection to its team-building potential. Fortunately, Kolb's Learning Styles Inventory comes with a booklet which contains several suggestions and exercises for application in areas such as team building, conflict management, and career planning.

*It was helpful to see my preferred learning style and compare it with other's preferred styles. I'm still not really sure if I understand what my type of learning style means-how it translates in a meaningful way. I'm glad we have a copy of the Kolb Learning Style Inventory to refer to for further self assessment.*

## **Recommendations**

At the outset of this report we pointed out that the Voluntary Sector Initiative's Panel on Accountability and Governance (1999) has identified the need for capacity building as the first step towards better accountability and governance in Canada's non-profit sector. Capacity building requires “support by corporations, governments and funders for intermediary associations, research and training, technology, and board and management development” (p. iii). It requires effort and commitment on the part of individuals in many different roles in the system. The recommendations in

## *Enhancing Boards Community Summary*

this section therefore are directed to individual board members, to boards of non-profit organizations, and to provincial and federal policy makers and others involved in setting policies that affect governing boards. The recommendations reported below were co-developed with the participants in this study.

### ***Recommendations to Individual Board Members***

The recommendations to individual board members flow from the reflections by participants on the learning design and what they felt was valuable about the project.

#### **1. Build networks**

Seek out other board members to exchange ideas and advice, develop 'learning circles' and support groups.

#### **2. Learn how you learn.**

Explore and learn about learning styles and how to capitalize on your strengths.

#### **3. Discover your board's strengths; recruit to round out the skills of the group.**

Take time to discover the learning styles of your board members and 'map' the group's talents and strengths; embrace diversity and recruit new people with an eye to rounding out the skills within your group.

#### **4. Take advantage of training opportunities.**

Invest in yourself as an important asset to the community. Take advantage of training opportunities. (See resource section on page 32 for ideas).

#### **5. Acknowledge your contributions.**

You are an important long-term resource for the community. Give credit to yourself and your peers for making regular contributions to the well-being of the community in spite of many systemic disadvantages. What you do does make a difference. Protect your own energy and commitment through regular rest and renewal.

## ***Recommendations to Boards of Non-Profit Organizations***

### **1. Create a budget line for board expenses.**

The primary recommendation to non-profit boards and their organizations was to create a budget line for board expenses. Research participants felt strongly that such expenses should have a legitimate place in organizational budgets. It was acknowledged that many middle class boards did this, although inner city board members did not feel entitled to do it.

Items to be included in this budget line characterize support to attend regular meetings, such as food (since people frequently meet over the dinner hour), providing childcare or reimbursement for childcare costs when board members attend meetings, and reimbursement of transportation and parking expenses. Other legitimate expenses include volunteer recognition programs (throughout the organization) and board development.

### **2. Encourage volunteers to attend workshops and seminars to build skills and knowledge; get conflict management training.**

Members also thought board support should go beyond attendance to the development of the board itself. This included opportunities for individual board members to attend seminars related to their particular roles and responsibilities, and to get training in effective conflict management. It was a widespread opinion that as many people as possible should have access to conflict resolution training.

Some members had pointed out that rather than wait for funders to legitimize those expenses, they had done what they could with the resources they had to work with, including applying for small grants for board development and strategic planning retreats.

### **3. Seek out consultants for guidance on key aspects of governance.**

Besides taking advantage of external training opportunities, boards need to be able to hire consultants who can provide expertise on key aspects of governance. By the end of the sessions, participants were clear that hiring consultants was sometimes critical for solving specific problems, for important activities such as board and executive evaluation, and for ongoing organizational development and planning.

## ***Recommendations to Federal and Provincial Policy Makers***

The specific recommendations to various levels of government were influenced by the fact that different sectors of service were represented in the project. The following recommendations, therefore, are directed to those who might have jurisdictional authority, in most cases provincial governments for childcare centers, but also the federal government or its designates as part of the Voluntary Sector Initiative.

### **1. Acknowledge the legitimacy of a budget line for board expenses.**

Although boards have the legal authority to create a budget line for board expenses, funders who disallow board expenses have enormous clout because they have the power to withhold financial resources upon which these organizations rely.

This recommendation flowed out of an acknowledgement of the personal financial challenges participants experience while carrying on with their civic responsibilities to their community as board members. What board members ask for is basic fare, not luxury items; the necessities that “ease the load” and remove barriers to their participation. As one participant commented:

*Being frugal is important. I think we have proven we can be frugal. But being frugal does not have to mean excessive self-sacrifice and further subsidizing of the organization and the sector than we, as women, already do.*

### **2. Provide consultants to work with boards.**

The participants recommended the hiring of community development facilitators/advisors to provide consultation to boards. This might be a more cost effective measure in the long run than providing additional funding to organizations to contract services individually. However, having been patronized in the past, participants were wary about the attitudes of those hired for such positions. In the words of these participants:

*P1: I hope that the government would have the attitude that it's the people in the communities on the boards that know best what they need. So we're not looking for somebody to come in and... “bestow all that knowledge and wisdom on us”, but to be responsive and to provide what's really being asked for. We want to be able to meet these people ...as peers.*

## *Enhancing Boards Community Summary*

*P2: When we started we had various [government] people helping us and ... a typical response was "Well we have to look at the language and we have to bring it down to the level of the community". So, I went to these people and started saying "Well, we need to bring you guys up to the level of the community (all laughing). That is the voice that needs to be heard.*

In essence, participants wanted to ensure that a government employee providing consultation would approach their role in more of a peer relationship than a hierarchical one.

### **3. Develop a multi-media package of resources.**

Participants also recommended developing a package of resources that would appeal to a variety of learning styles. This could include:

- a. An interactive web-site with various sub-categories related to governance and links to other relevant sites (ie. fundraising opportunities, financial management, conflict resolution, insurance, etc.). As one participant commented:

*I would like to see the board orientation resources, like policies, bylaws and all those kinds of explanations on the web so they're there when you need them, not just when the sessions are offered, so that you will have a tool to refer to at your convenience. Also, a posting of when the trainings are offered. I would also like to see them have a web page linked to fundraising, so people don't have to search all over the web like I did.*

- b. An up-to-date comprehensive manual (on-line and in a binder), with templates and samples: by-laws, policies, volunteer position descriptions, minutes, and "especially an index"<sup>3</sup>.
- c. Produce a training video:

*I think if they could put together a good video, that has humour in it, that has people telling some stories, as an*

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<sup>3</sup> Manitoba Family Services and Housing has a document entitled: The Roles, Responsibilities and Functions of a Board: A Board Development Guide (updated Feb, 2002). This document is "prepared by the Department for the boards and staff of provincially funded social service agencies; the guide is not intended to be a detailed procedures manual, but to provide awareness of the basic responsibilities and functions expected of a governing board and its members". See [www.gov.mb.ca/fs/index.html](http://www.gov.mb.ca/fs/index.html), click on Child Day Care. It has recently been made available on the main page under Publications.

## *Enhancing Boards Community Summary*

*orientation for people that sit on boards...Videos are a wonderful tool, because people like visuals... and they're not listening to the same person talk...You can get the maximum amount of information across in a pleasant way.*

### **4. Provide for conflict resolution training.**

Members felt that every board should get community-based conflict resolution training, so that good conflict management skills are developed from the start and intractable conflicts are prevented or minimized. They felt that there is a very large burden of responsibility on the shoulders of well-meaning, but not always well-trained, volunteers of community organizations, as it is. There is too much at stake when organizational conflicts arise and jeopardize the well-being of many people who rely on the services provided. There are too many examples of organizations who have had to close their doors because boards folded (CUPE, n.d.).

### **5. Develop a board training & development 'series' with interactive workshops and networking events.**

Focus group participants believed regular (perhaps monthly or quarterly) training and/or networking events could be offered, featuring topics such as liability insurance, executive evaluation, budgets & financial statements, proposal writing, volunteer recruiting & retention, and so on. The Manitoba Child Care Association's annual "Feed the Board" event offers an excellent model.

Not surprisingly, given the overall positive feelings about the training they had just attended as part of this project, they recommended the provision of workshops for board members that are interactive and utilize community development principles. These included elements such as opportunities to discuss current board issues and concerns within a climate of trust, affirming diversity, opportunities for self-reflection and developing self-knowledge, using humour, offering a variety of learning activities and being able to move around frequently, and most importantly, creating the space for dialogue and networking among participants.

## **Conclusions**

*Canada's voluntary sector plays a central role in building vibrant communities, providing important services to Canadians and engaging citizens in the democratic life of the country.*

Panel on Accountability and Governance, 1999, p. vii.



## *Enhancing Boards Community Summary*

Our experience in this research project has clearly demonstrated to us the enormous potential for community capacity building inherent in the board leadership of non-profit organizations. These are people deeply embedded within their communities with great potential to influence others.

Board members are long term resources for the community worthy of significant investment. It is important to capitalize on their interests and commitment. For example, for many over-extended working parents with young children, their licensed childcare or resource centre becomes their most immediate community support network – there simply aren't enough hours in a day to develop networks elsewhere. Findings elsewhere (Ontario, 1993) have suggested that board and committee work related to their children's care is frequently an entry point for people into the world of community work. If we are to take the long term view of community capacity building we need to understand the importance of providing supports and resources at this key moment of leverage in the lifespan of volunteers' contributions in their community.

We believe the above recommendations to boards, provincial governments, the Canadian government, and those supporting the Voluntary Sector Initiative if implemented will greatly enhance the potential of the voluntary sector. Effort and commitment are required from individuals fulfilling many different roles in the system. The first step is to remove barriers to participation. The expenses associated with volunteering must be acknowledged and reimbursed. Training models for board members should use interactive, community building approaches that appeal to a variety of learning styles and be customized to the particular needs of each organization. Further, they need to be inclusive, and sensitive to cultural, gender and class differences. Finally, they must capitalize on and deepen existing networks while fostering the development of new networks and co-mentoring relationships. In this way we will encourage a learning culture which promotes ongoing development and lifelong learning for those who hold our families and communities together.

## Appendices

### ***Appendix A – Glossary of Terms***

Here's a great tip! If you have access to the Internet, go to GOOGLE (www.google.ca). In the search box, type in  (or whatever word you want to look up). The definition(s), several reference dictionaries and other sources will come up.

**Accountability** is the “requirement to explain and accept responsibility for carrying out an assigned mandate in light of agreed upon expectations. Accountability in the voluntary sector is multi-layered – to different audiences, for a variety of activities and outcomes, through many different means” (Panel on Accountability and Governance in the Voluntary Sector, 1999).

**CEO** Chief Executive Officer, often used interchangeably with **E.D.** (Executive Director).

**Co-mentoring:** mentoring and supporting each other; helping each other learn in a peer-to-peer relationship.

**Community learning** is defined as “an activity through which a group identifies and then solves common problems while acquiring knowledge and skills... It operates in a horizontal, networked fashion and often is associated with lifelong learning” (New Economy Development Group, 1998).

**Et al.:** Latin for “and others”, usually used in citing references. If there are more than 2 authors, the shortened form *et al.* is used (Jones et al., 2001).

**Formal education:** education or training provided in educational institutions such as schools, universities, colleges, etc. or in a workplace, usually involving direction from a teacher or instructor. (See [www.anta.gov.au/gloftol.asp](http://www.anta.gov.au/gloftol.asp))

**Inclusion/Inclusivity:** Manitoba Education, Training, and Youth's Philosophy of Inclusion states: “Inclusion is a way of thinking and acting that allows every individual to feel accepted, valued and safe. An inclusive community consciously evolves to meet the changing needs of its members. Through recognition and support, an inclusive community provides meaningful involvement and equal access to the benefits of citizenship. In Manitoba, we embrace inclusion as a means of enhancing the well being of every member of the community. By working together, we strengthen our capacity to provide the foundation for a richer future for all of us”. See [www.edu.gov.mb.ca](http://www.edu.gov.mb.ca) .

**Informal education:** the acquisition of knowledge and skills through experience, reading, social contact, etc. (See [www.anta.gov.au/gloftol.asp](http://www.anta.gov.au/gloftol.asp))

## *Enhancing Boards Community Summary*

**Learning culture:** an “environment in which opportunities for learning are openly valued and supported and are built, where possible, into all activities”. (See [www.anta.gov.au/gloftol.asp](http://www.anta.gov.au/gloftol.asp))

**Lifelong learning:** the process of acquiring knowledge or skills throughout life via education, training, work and general life experiences.

**Methodology:** “The way in which you find out information; a methodology describes how something will be (or was) done. The methodology includes the methods, procedures, and techniques used to collect and analyze information” See [www.synergyaids.com/lacri aids/glossary.asp](http://www.synergyaids.com/lacri aids/glossary.asp)

**Microcosm:** a miniature model of something. See [www.cogsci.princeton.edu/cgi-bin/webwn](http://www.cogsci.princeton.edu/cgi-bin/webwn)

**Non-formal education:** “organized education and training outside of the formal education system”. (See [www.anta.gov.au/gloftol.asp](http://www.anta.gov.au/gloftol.asp))

**Policy:** a plan or course of action intended to guide and determine present and future decisions. Rules, regulations and guidelines embracing the general goals and acceptable procedures of a governing body (board, council, government, etc. (Webster Dictionary, 2000).

**Prescriptive:** “Laid down as a guide, direction, or rule of action... Usually implies instructions that are given step by step in some detail and that are to be followed without question”. See [www.projectauditors.com/Dictionary/P.html](http://www.projectauditors.com/Dictionary/P.html)

**Reiterate:** to say, state, or perform again. [www.cogsci.princeton.edu/cgi-bin/webwn](http://www.cogsci.princeton.edu/cgi-bin/webwn)

**Tenure:** the length of time, or the term which some position is held. In this context, tenure refers to the length of time a person has served on a board of directors. See [www.cogsci.princeton.edu/cgi-bin/webwn](http://www.cogsci.princeton.edu/cgi-bin/webwn).

## **Appendix B: Resources for Boards**

### **Books, Articles, Reports & Guides on Board Development**

Alberta (1995). *Board Building: Recruiting and Developing Effective Board Members for Not-for-Profit Organizations*. Edmonton: Alberta Community Development.

Deloitte & Touche (2003). *The Effective Not-for-Profit Board: Governance of Not-for-Profit Organizations*. Deloitte & Touche Tohmatsu International.

Manitoba Family Services and Housing (February 2002). *The Roles, Responsibilities and Functions of a Board: A Board Development Guide*. Manitoba: Ministry of Family Services and Housing. **See:** <http://www.gov.mb.ca/fs/publications.html>

Ontario (1993). *Study of Non-Profit Child Care Boards in Ontario*. Toronto: Ministry of Community and Social Services.

Ontario Coalition for Better Child Care (2002). *Child Care Management Guide*. Toronto: Ontario Coalition for Better Child Care.

Manitoba Child Care Association (1999). *Human Resource Guide for Early Childhood Programs*. Winnipeg: Manitoba Child Care Association.

Heineck, Kira. (2003) *Woman Power and Politics*. Toronto: Ontario Coalition for Better Child Care. **See** <http://www.childcareontario.org>

Block, Stephen R. (1998) *Perfect Non-profit Boards: Myths, Paradoxes, and Paradigms*. Needham Heights, Mass: Simon & Schuster

Carver, John. (1992) *Boards That Make a Difference*. San Francisco, Jossey-Bass. **See** <http://www.carvergovernance.com/home>.

Carver, John. (1992). When Owners Are Customers: The Confusion of Dual Board Hats. *Non-profit World*, 10, 11-15.

Carver, J. & Mayhew Carver, M. (2001). Carver's Policy Governance Model in Non-profit Organizations. *Gouvernance: revue internationale*, 2, 30-48.

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Mayhew Carver, M. (1988). Governing the Child and Family-Serving Agency: Putting the Board in Charge. *Georgia Academy Journal*, V, 8-11.

Nordhoff, N., Larsen, J., Barber, P., & Craig, D. P. (1982). *Fundamental Practices For Success With Volunteer Boards of Non-profit Organizations*. Seattle, WA.: Funprax Associates.

Ontario (1984). *Working With Volunteer Boards: How To Improve Their Effectiveness*. Toronto: Ministry of Community and Social Services.

Panel on Accountability and Governance in the Voluntary Sector (Feb, 1999). *Building on Strengths: Improving Governance and Accountability in Canada's Voluntary Sector*. Ottawa. See <http://www.vsr-trsb.net/pagvs/>

### **Web-sites**

**The United Way of Canada** has a web-site devoted to board development: [www.boarddevelopment.org](http://www.boarddevelopment.org)

**The Institute on Governance** has extensive information on board development and links to other sites. See [www.iog.ca](http://www.iog.ca) .

**Voluntary Sector Initiative:** [www.vsi-isbc.ca/eng](http://www.vsi-isbc.ca/eng) a wealth of resources available.

**Institute for Community Research:** [www.incommunityresearch.org](http://www.incommunityresearch.org)

**The Transformative Learning Centre:** This centre is part of OISE/UT (Ontario Institute for Studies in Education /University of Toronto). See <http://tortoise.oise.utoronto.ca/~tlcentre>

### **Training Programs & Other Resources**

**David Kolb:** A full explanation of Kolb's theory of experiential learning and the Learning Styles Inventory Version 3 are available on his web-site: <http://www.learningfromexperience.com> . To order the Learning Styles Inventory and many other learning tools see: <http://www.hayresourcesdirect.haygroup.com/> .

**Debra Mayer, Teachable Moments:** Debra is a consultant to early childhood programs in the areas of staff and volunteer development. Areas of focus include staff/board role definitions, strategic planning, team building, and participatory management processes. Contact her at 204.489-6897 or [debramayer@shaw.ca](mailto:debramayer@shaw.ca)

**Gemmel Consulting & Training:** Barb Gemmel is a consultant in non-profit and volunteer management. She publishes a monthly email newsletter on timely topics related to the voluntary sector. To subscribe to her free mailing list or inquire about her other services contact her at 204-253-6638 or by email: [bgemmell@mts.net](mailto:bgemmell@mts.net).

## *Enhancing Boards Community Summary*

**Heather Erhard, Erhard Associates:** offers an array of organizational development consulting services including board governance. Phone: 204-488-4348. Email: [erhardh@mts.net](mailto:erhardh@mts.net).

**ICA Canada** – The Institute for Cultural Affairs Canada offers a training series “Towards a Culture of Participation”. Themes relate to board and team building, organization development, facilitation, community consultations, etc. See website: [www.icacan.ca](http://www.icacan.ca) or contact **Helen Wythe & Associates** at 204-992-2562. Email: [helenwythe@hjwythe.com](mailto:helenwythe@hjwythe.com) .

**Lynn Skotnitsky, Consulting & Research for Organizations & Communities** offers client-centred consulting, training & facilitation, and research services. She can be reached at (416) 429-7116. Email: [lynn.skotnitsky@primus.ca](mailto:lynn.skotnitsky@primus.ca).

**Manitoba Child Care Association** offers board development workshops during their fall & winter seminar series, a newsletter, and a networking and board development event at their annual conference (usually in May). They also have a resource library. Website: [www.mccahouse.org](http://www.mccahouse.org).

**Volunteer Centre of Winnipeg:** offers a variety of workshops related to non-profit governance, and a resource library. Get on their mailing or email list! See [www.volunteerwinnipeg.mb.ca](http://www.volunteerwinnipeg.mb.ca)

### **Political Representatives**

For listings of your representatives (by city ward, and provincial or federal riding) see:

**City Councillor.** See [www.winnipeg.ca/interhom/council/](http://www.winnipeg.ca/interhom/council/)

**Provincial MLA.** [www.gov.mb.ca/legislature/members/](http://www.gov.mb.ca/legislature/members/)

**Federal MP.** See <http://www.parl.gc.ca> Click on Senators and Members (below the pictures).

For explanations and descriptions of the roles of various government representatives, and a wealth of other information see <http://canadaonline.about.com/library/elections/blelmpfed.htm> .

### **Funding Sources for Board Development Activities**

**Assiniboine Credit Union Community Project Fund**

<http://www.assiniboine.mb.ca>

**Co-operative Development Services** (under MB Intergovernmental Affairs)

[http://www.gov.mb.ca/ia/programs/brochure\\_intro\\_coops](http://www.gov.mb.ca/ia/programs/brochure_intro_coops). See financial programs.

**The Winnipeg Foundation:** [www.wpgfdn.org](http://www.wpgfdn.org)

**The Thomas Sill Foundation:** <http://www.thomassillfoundation.com/>

**Appendix C:  
Knowledge, Skills  
and Attitudes for  
Effective  
Governance  
(complete list)**

**Knowledge.**

1. The mandate, mission, vision, board history, goals, services, programs and policies of the organization
2. Legal aspects e.g. insurance, liability and legal responsibilities
3. The “players” political allies, funders, policy makers
4. Evaluations
5. Procedures for running meetings
6. Policies and by-laws
7. Knowing different resources and networks
8. Should be representative of your stakeholders and community
9. 5 W’s, who are we, why are we here, purpose of organization
10. Know your staff, how much money do we have, what are limitations
11. How to develop a budget
12. Recognize your board’s skill sets
13. Understanding the power dynamics, (within board and within organization)
14. Fundraising (ideas and how to)
15. How to put together an agenda
16. AGM, know how to plan, organize, and carry out
17. Robert’s Rules
18. Advertising
19. Different models of decision making
20. Have a realistic sense of what’s involved, what’s doable
21. What’s board/what’s management responsibilities
22. Labour laws
23. How to present ideas and make presentations
24. Strategic planning
25. The “rules”
26. Understanding of media /PR
27. Knowledge of incorporation and charitable status
28. How to read a financial statement
29. Knowledge of the roles and expectations of the board and executive director
30. Ongoing policy development
31. Knowledge and understanding of the policy manual
32. Understanding the needs of your stakeholders
33. Multicultural awareness
34. Understand the importance of your job
35. Board should be representative of your population/constituents, (including race, gender, class, religion, age, interests, family, work).
36. How to chair a meeting
37. How to take minutes

## *Enhancing Boards Community Summary*

38. Knowledge of Board packages and training resources
39. Understanding conflict of interest issues
40. Conflict resolution
41. Union agreements
42. Confidentiality
43. Human resources
44. G.S.T.
45. Problem solving
46. Know your rights
47. Know that mistakes don't mean failure
48. Pay scales
49. Knowing what questions to ask/what you can and can't ask
50. Strategic planning
51. Board roles and responsibilities
52. Financial knowledge: policies, budgets, how to read financial statements
53. Community resources
54. Understanding the staff's world and staff dynamics
55. Volunteers' needs as human beings
56. Confidentiality
57. The limitations of the board's roles/boundaries
58. Employment standards, employment checks and criminal records
59. Researching
60. Drafting by-laws
61. Your community/volunteers' commitments
62. Job descriptions
63. Governance models/styles
64. Funding sources/needs
65. Appropriate fundraising for your community
66. Political context/issues

67. Know what you do know and know what you don't know

### **Skills**

1. Managing the dynamics of the team
2. Defining and working towards goals
3. Community capacity building
4. Presentation skills
5. Time management
6. Balance teamwork/leadership
7. Giving clear directives
8. Be supportive to staff (especially E.D.) without interfering
9. Observing/intuition about people
10. Tapping your networks
11. Mediation
12. Knowing when to say no
13. Following through
14. Making informed decisions
15. Encouraging quiet people
16. Give and receive praise
17. Give constructive criticism/feedback
18. Think outside the box/and better inside the box
19. Skill-building/people development
20. Educating your board
21. Being and getting yourself known in the community (networking)
22. Good transfer of skill and knowledge to succeeding board members
23. Motivation skills (self and others)
24. Developing personnel policies
25. Being sensitive



## *Enhancing Boards Community Summary*

26. Recognizing what you need to learn
27. Reading and managing community dynamics
28. Being tactful
29. Supporting others
30. Organizational skills, breaking down tasks, delegating, staying organized
31. Be and keep being creative
32. Taking and managing minutes
33. Sense of humour, ability to play
34. Multi-tasking
35. Develop a budget
36. Unpacking or clarifying expectations
37. Setting realistic goals
38. Educating your staff
39. Consensus building
40. Being responsive to the needs of your stakeholders
41. Helping people be congruent
42. Considering various points of view
43. How to hire people/developing job descriptions, interviewing, evaluations
44. Developing allies in government
45. Recruiting/advertising
46. Selecting as a group/candidates
47. Being able to explain processes to groups/change can take years
48. Knowing how to work with others
49. Having a Pulse!!
50. Keeping people interested and motivated
51. Problem solving skills
52. Running meetings and staying on topic
53. Conflict resolution skills
54. Ability to get others involved
55. Showing up faithfully, or notifying if you can't make it
56. Getting and seeking professional advice / consultants
57. Being Accountable
58. Confidentiality
59. Fundraising/creativity/"doing"
60. Reading correspondence
61. Listening
62. Being assertive
63. Encouraging /empowering others
64. Ability to separate your feelings and needs from others
65. Doing what you say you'll do
66. Remembering
67. Punctuality
68. Being Respectful
69. Managing board and staff roles
70. Representing the organization in a businesslike and positive manner
71. Building on success/learning from mistakes
72. Managing board dynamics and accountability, sharing and informing within the board
73. Managing power dynamics appropriately
74. Developing an agenda
75. Chairing / sharing roles
76. Dealing with and paying staff appropriately
77. Delegating meaningful work to others and committees

## *Enhancing Boards Community Summary*

78. Communication skills:  
VERBAL: listening, public speaking, constructive board/staff communications  
WRITTEN: writing letters, grant proposals, keeping minutes accurately
79. Facilitating meetings
80. Celebrating/honouring your volunteers
81. Mentoring
82. Making decisions for the benefit of the group
83. Know your limitations/when to back away
84. Not overloading your volunteers
85. Taking responsibility for a board role
86. Ability to think differently without taking things personally
87. Setting a constructive tone
88. Self awareness
89. People skills
90. Job / role sharing, turn-taking
91. Research skills
92. Staying on task
93. Confidence
94. Outreach
95. Knowing who's who in key positions
96. Sharing power/ sharing the workload
97. Knowing when it's important for board renewal/retreats
98. Honouring your staff
99. Inspiring others
100. Regular reviewing of plan, policies, etc.
101. How to lose and win gracefully
102. Resisting gossip
103. Diplomacy

### **Attitudes**

1. Honouring, valuing, and representing the community you serve (your stakeholders / constituents)
2. Willing to work as part of the team/ being team-minded
3. Respectful of people, other cultures and differences (e.g. lifestyles)
4. Persistence and strength to carry on/achieve your goals
5. Should reflect the organization's guiding principles
6. Learn to accept criticism
7. Focus on the common good
8. Non-judgmental
9. Willing to contribute
10. Honesty
11. Integrity
12. Kindness
13. Compassion
14. Patience
15. Sense of humour
16. Thinking outside the box (and thinking well inside the box!)
17. Ability to celebrate
18. Being self-responsible / Accountable for your own actions
19. Thick-skinned
20. Able to deal with tough situations
21. Willing to forgive (mistakes)
22. Believe that mistakes are allowed
23. Give people space to grow (not staying stuck with labels)
24. Strong beliefs, spirituality, a bigger perspective
25. Being true to yourself

## *Enhancing Boards Community Summary*

26. Being committed to the mandate
27. Commitment to meetings and to showing up
28. Empathy and respect for people's safety issues and boundaries
29. Willingness to learn, openness to grow and expand
30. Adaptability and flexibility
31. Positive attitude/believe in the best
32. Inspiring people to join up
33. Courage to dissent
34. Welcoming
35. Cooperative
36. Value other's contributions
37. Transparency/ not hidden agendas
38. Respecting confidentiality
39. Confidence
40. Risk taking
41. Objectivity/ perspective
42. Believe in your convictions/manage discouragement and setbacks
43. Know you can't do everything! Being open to receiving help
44. Fairness
45. Being supportive vs. patronizing
46. Professional
47. Enthusiastic
48. Encouraging
49. Curious
50. Trusting and trustworthy
51. Confident
52. Courteous
53. Approachable
54. Treat others the way you want to be treated

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**Notes**