Community 2.0 - Governance & Engagement in Community Development

By

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We accept this Thesis as conforming

to the required standard

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ABSTRACT

The Olds Institute for Community and Regional Development (OICRD) Board of Directors is challenged to continue to provide the governance to allow the committee work that is occurring to continue and improve. This inquiry asked; how can shifting the governance model in the OICRD improve community engagement with sustainability planning and implementation? The research engaged the past chairs, current executive, essential member boards and committee members using an Organizational Action Research (OAR) methodology and focus group and survey research methods to complete the readiness for change cycle of the OAR model. The results illustrate that the four organizations that constitute the OICRD need to rediscover their interdependence and re-focus relationships between the four and the OICRD committees. The OICRD must build the physical and virtual infrastructure to engage members in order to generate meaningful possibilities, and employ new action research practices to move possibilities to action, report and celebrate successes.
ACKNOWLEDGEMENTS

Primarily I would like to thank my cohort from Royal Roads University (2011-3) for providing an inspiring community to learn and explore this multifarious topic of leadership. The support, camaraderie and humor will stay with me forever. I drank the leadership latte and I liked it.

To my family, leadership does not occur in a vacuum. Much of my master’s education was a journey of self-discovery and I hope that you are the beneficiaries of those discoveries. Cory, it was amazing to watch as your own self-discovery was unfolding in parallel with mine as we struggled to make our relationship everything that we want (do you want to tap on it?) Bill, our talks about philosophy and different worldviews was a constant inspiration for me to continue to peel back layers of discovery in order to understand community development in meaningful ways for you and your generation. Sam, your quiet approval of my transformation into a better person and dad is a gift that I will always cherish. I love you all.

To the staff and Council at the Town of Olds, thank you for allowing me to take this journey and creating the space necessary to study and bounce ideas off of you when new ideas seemed to have potential.

To the Olds Institute Family, your questions and suggestions continued to push open the door because you truly were inspired and were inspiring in this journey.
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CHAPTER ONE

The Olds Institute for Community & Regional Development (OICRD) was formed in late 2001 to coordinate economic development initiatives by four major public players in Olds, Alberta. The Institute includes four member organizations: the Olds Agricultural Society, the Olds & District Chamber of Commerce, Olds College, and the Town of Olds. Each of these organizations contributed people and money to seed the Institute. The Board held public input workshops early on in its establishment, which helped establish priorities, and helped the volunteers focus their objectives from a strong base of public support.

In 2005, the opportunity to become involved in community sustainability planning was a challenge that the OICRD took on in an attempt to improve its planning process and success.

Facing increased growth pressures and a strong provincial economy, Olds recognizes that without a plan or road map in place any momentum we may have gained in the past for moving toward a sustainable future may be lost. In these efforts, many challenges have surfaced. Not having a road map for sustainability to guide us through our sustainability journey has left many with uncertainty, and confusion about the direction we are headed. The Federal Government of Canada defines a sustainability road map as an Integrated Community Sustainability Plan (ICSP). In hopes of protecting the well-being of future generations and providing a platform for change toward sustainability, the Town of Olds and its greater community have created our first ICSP titled - Olds Strategic Sustainability Plan (OSSP). (Town of Olds, 2008)

In 2005, the Federal Government of Canada introduced a new funding source for Municipalities known as the New Deal for Cities and Communities that provided grants from fuel sales. The objective of this funding was to achieve a higher quality of life and standard of living across the country. The funding program encompassed four interdependent dimensions: economic, environmental, social and cultural where every municipality was required to adopt a set of sustainability principles that addressed each dimension. With this funding, came the
expectation that all municipalities in Canada start planning for the future needs of their community by creating an ICSP.

In Alberta, The Alberta Urban Municipalities Association (AUMA) created a framework to assist local government in creating their ICSP. In Olds, the OSSP was built using the AUMA framework which added governance as a fifth dimension to the four dimensions of sustainability identified by the Government of Canada ICSP framework. The AUMA identified 15 strategic areas that required goals, strategies and actions in order to complete their Municipal Sustainability Plan (MSP) process.

Olds Town Council approved the OSSP in February 2008, and it has been an effective tool for setting community priorities and taking a more future-focused view of planning. As part of the community engagement process the OSSP was very prescriptive. It stated who did what and when. This prescription conflicts with what many authors of action research promote; “policies and programs should not dictate specific actions and procedures but instead should provide the resources to enable action that is appropriate to particular places” (Stringer, 2007, p. 3). Implementation and renewal of the plan has proven difficult, as has the ability to maintain the enthusiasm that was part of the development of the plan. Accordingly, in 2011 the second iteration of the OSSP was developed. The renewal saw a move to a more principle-based framework where “dialogues are diverging, they do not seek agreement, but a richer grasp of complex issues” (Senge, 2006, p. 230).

The OICRD is a nonprofit society that is responsible for stewardship of the sustainability planning process (Appendix A). In my position as the Chief Administrative Officer (CAO) with
the Town of Olds, I act as an affiliate member of, and advisor to, the Board of Directors of the OICRD.

My inquiry question was: How can shifting the governance model in the Olds Institute for Community and Regional Development improve community engagement with sustainability planning and implementation? My sub-questions were: What are the current effective engagement practices? What are the challenges currently causing difficulties with engagement? What factors would facilitate continued planning, implementation and renewal?

**Significance of the Inquiry**

Sustainability planning and the incentive that the federal gas tax rebate brought to the initial development of ICSPs have begun to wane. The same enthusiasm that was apparent in the early stages of this work is more difficult to maintain as low hanging fruit such as energy reduction, further waste diversion from landfill, reusable shopping bags, water conservation and so forth, have been planned, implemented and realized. The more difficult task has proven to be continued engagement. There has been good work done across the nation and certainly in Olds through the development of ICSPs but the work has reached a plateau and requires new tools in order to remain as the guiding framework for sustainable community development and “these alternatives come about through sustainable learning” (Coghlan & Brannick, 2010, p. 72).

The implication of this plateau for the Olds Institute for Community and Regional Development is significant. The genesis of the OICRD was traditional economic development that focused on business attraction and retention. The move to community economic development and then to sustainability planning has not been fully institutionalized. Defaulting
back to a more business-oriented development model may occur if the proper consideration is not given to a more holistic, systemic vision. This could fragment sectors of the community and see groups, businesses, and citizens alike returning to competition for resources as well as a fracture of the community development work that has been accomplished by bringing together the efforts of all five sustainability dimensions in a coordinated way.

The most significant aspects of this research from an Organizational Leadership Thesis perspective are the possibilities and undiscovered links between civil society and a generative governance orientation along with the utilization of new tools to bring them together. Our hope was to find a balance between the practice of organizational learning and the theory around solving systemic governance issues in the nonprofit sector.

**Organizational Context**

The OICRD:

Is an independent public community development governance board incorporated under the Societies Act of the Province of Alberta and sanctioned by the Town of Olds. Building on the support of the four founding Essential Members (Olds Agricultural Society, Olds & District Chamber of Commerce, Olds College, and the Town of Olds), the Institute generates significant synergy within the community by encouraging collaboration between the Essential Members and other community stakeholders so that the sum is greater than each of the individual contributors. The Institute facilitates community consultations with stakeholders. These stakeholders include, but are not limited to, business owners and operators, investors, educators, providers of government and health services, seniors, youth, spiritual organizations, recreation organizations, tourism organizations, arts and cultural organizations, communication and technology providers, elected officials, volunteers and residents of our community and region. The Institute ensures all community development decisions and recommendations are assessed as to the impact they will have on the economic, social, educational, cultural, environmental and political dimensions to realize a balanced growth and to increase the wealth of the community and region. The Institute supports the building of community capacity that is represented by skills, knowledge and the ability to find the tools to accomplish this. (Olds Institute for Community and Regional Development, 2011)
The OICRD is at an interesting point in its evolution. After ten years of functioning as the community economic development arm of the Town of Olds and the last five years as the steward of the community sustainability plan, the organization and the expectations of the OICRD are changing. The Institute is beginning to build an administration after functioning solely as a volunteer organization. With the hiring of an Executive Director and administrative support, the OICRD is preparing to move to a new era by providing community economic development services to the community. The OICRD is creating new revenue streams to fund its ambitious desire to be fully self-sufficient and to in fact raise significant money to put back into community programs and services. In the spirit of what the literature refers to as social entrepreneurial ventures, the OICRD has created two for profit entities: Mountain View Power, a boutique electricity retailer and Olds Fibre Ltd. a $12M Fibre to the Premise network (internet, telephone and television) which has the potential to generate millions of dollars annually for the OICRD to carry out its mission. This model of retaining local capital and reinvesting in community development may require different governance practices and a better understanding of the relationships and rationale for these types of ventures.

As opposed to a more traditional approach where the Town of Olds would have developed these two ventures, much like our developing other utility infrastructure systems, the Town has taken advantage of enabling legislation in the Municipal Government Act and has provided loans and loan guarantees to the OICRD in the sum of $10M. This type of support to a nonprofit association has required not only knowledge of legislation but also the ability to communicate the wisdom of this type of investment support in our community to OICRD
supporters and opponents alike, which has added to the necessary skills needed to govern in this environment.

As the organization continues to build the capacity to realize its agenda, the Board of Directors is challenged to continue to provide the governance to allow the committee work that is occurring to continue and to improve. At the same time, Olds Town Council, who sanctions the mandate of the OICRD remains committed to the ideal that the OICRD is their conduit to the community on matters related to community economic development. Council expects that the public engagement that has defined the OICRD throughout its existence, remains a focus and priority as committed to and defined in the governance vision of the OSSP (Appendix B).

Insight and understanding of the idea of private government and civil society that follows in the report will be helpful in gaining the required support for this type of community development work going forward.

Organizational Systems Analysis of the Inquiry

The Society for Organizational Learning (SOL) (n.d.) was created in 1997 with Peter Senge as its founding Chairman. Exposed to the values and principles of The Learning Organization, including an online community of practice, has been extremely valuable to the understanding and passion for systems thinking and organizational learning that is growing within the OICRD. The SOL website has a paper on systems thinking that was adapted from an interview with Peter Senge and used as a bridge to incorporate the philosophy of The Learning Organization espoused through SOL and Senge (2011). “In a systems approach to a problem, you start by realizing that there is no inherent end to a system. There is no such thing as a
complete theory” (p. 1). Community sustainability planning is a complex process. Identifying
and weighing what various people and organizations value as being sustainable depends on
several factors. The process of engagement to discuss sustainability may be as important as the
strategies that are ultimately agreed to. Alignment, not a full understanding is all that we can
aspire to when examining systems. That is, alignment between what we value personally and
collectively as a community. Senge said there are three premises about personal power: each
person has a unique purpose, what an individual holds in his consciousness tends to become real
in the external world, and as the process of individual visioning unfolds among a group
committed to a common endeavour, the underlying purpose and vision of the group begin to
emerge. As the relationships and influence of the OICRD continue to grow, the approach to
governance will need to continue to evolve.

A fundamental issue that needs to be addressed is the relationship between the OICRD
Board of Directors and the governing bodies of its four essential members. Is the OICRD in
place to advance the missions of the four or is there a bigger vision that the OICRD needs to
examine and pursue? This question was the heart of this research project.

Community, according to Wikipedia and for the purpose of this report is defined as
follows, “in human communities, intent, belief, resources, preferences, needs, risks, and a
number of other conditions may be present and common, affecting the identity of the participants
and their degree of cohesiveness”. The OICRD is a value network (Allee & Schwabe, 2011) that
works within the larger community of Olds in order to increase participation and strengthen
cohesiveness. A value network is any purposeful group of people or organization creating social
and economic good through complex dynamic exchanges of tangible and intangible value; “they
are participating in this pool of common meaning, which is capable of constant development and change” (Senge, 2006, p. 231).

In a value network, the primary economic engine is people who convert their competence and other assets under their control into negotiable forms of value that can be deployed or delivered to others. From a governance, or according to Chait, Ryan and Taylor (2011) a governance as leadership position the goal is to create the right conditions for collaboration to happen and trust in the capacity of the group to self organize, respond to the environment, and even heal itself if things aren't working well (Allee & Schwabe, 2011). Barrett (2010) noted that, “values-driven organisations are the most successful organisations on the planet” (p. 2).

![Figure 1: Systems Diagram of the Olds Institute](image-url)
A system is “a network of interacting and interconnected parts forming a whole - which, for the purposes of discussion, is limited or defined by some form of boundary - be it artificial or natural, constructed, or emergent” (Cady, 2011, p. 2). Systems are found in nature and in human learning processes. As the Board of the OICRD continues to steward the sustainability journey in Olds, the need to understand systems boundaries in the community and what various stakeholders value will need to be a focus. Learning how to engage groups with conflicting values and build community capacity from the resulting tension that this creates is a way of creating action to move from our current state towards our vision for the future. Having the proper governance processes to widely engage individuals to contribute to building the vision will be key to success.

Hinck (2010) makes a distinction between nonprofits, social movements and counterpublics. These differences have implications on moving to new types of governance models because of established power relationships and forces to keep the status quo. The OICRD, through the Sustainable Olds Committee (SOC), pondered this relationship in 2012 when asking what we would do as a community if the Occupy Movement surfaced in Centennial Park in Olds. On April 14th, 2012, SOC hosted a community engagement event called The Other Side of Occupy. This event was an exercise in proactively understanding the social movement and counterpublic sentiments of the Occupy movement within the local context of our community. The Other Side of Occupy introduced us to the work being done on the Canadian Index of Wellbeing (2012) and the United Nations Report on World Happiness (Helliwell, Layard & Sachs, 2012) and Anielski’s (2007) work on the Economics of Happiness. This continues to inform the community development work of the OICRD.
Systems thinking is the process of understanding how things influence one another within a whole. In organizations, systems consist of people, structures, and processes that work together to make an organization healthy or unhealthy. Systems thinking is a way of understanding a reality that emphasizes the relationships among a system's parts, rather than the parts themselves, and how these parts evolve together. From a systems perspective, oftentimes, “today’s problems come from yesterday’s ‘solutions’” (Senge, 2006, p. 57). In Olds, we may need to move beyond the scientific view of systems thinking that we have been exposed to through the ICSP and The Natural Step (TNS) (2013) framework because the scientific method may not be sufficient for the study of systems dynamics. We have learned much about the relationships in our community because of our exposure to systems thinking; we need to continue to understand that our system is unique to us. Senge (2006) suggested that by being sensitive to feedback and using systems thinking as a way to learn about learning (meta-learning) we can sustain community engagement as a learning process that is more than a singular project or series of projects.

The next chapter I will review the review of literature of two topic areas relevant to this study: organizational change and generative governance. The section on organizational change will include a review of the literature concerning the subtopics of public engagement and systemic change in public organizations, strategic communication during change, and, sustainability/strategic planning, change and organizational learning. The section on generative governance will include a review of the subtopics defining generative governance, the link between generative governance and collaboration, facilitative leadership and how it supports collective learning and generative governance, and, a return to the philosophic tradition. Chapter Three outlines the methodology and approach used in our research and the rationale for choosing
the tools utilized. Chapter Four lays out the findings from our data collection and analysis as they relate to relevant scholarly and professional literature. Chapter Five discusses the inquiry implications, recommendations for the Olds Institute for Community & Regional Development, and touches on the limitations of our research in this inquiry. Chapter Six concludes with meta-reflections and recommendations for the academic field of leadership research and practice.
CHAPTER TWO: LITERATURE REVIEW

The topics of organizational change and generative governance were considered when researching our question: how can shifting the governance model in the OICRD improve community engagement with sustainability planning and implementation? A balance was sought between seminal works, current literature and course material as part of this review.

Organizational Change

Public engagement and systemic change in public organizations

Traditionally public organizations exist to provide programs and services that do not have a business case supported by private sector goals. Public sector and volunteer organizations provide a greater public good. Increasingly, the ability to identify and deliver this greater public good requires new and more direct ways to learn about the public need and ways to meet those needs. Senge (2006) suggested that his book *The Fifth Discipline* “is for learners, especially those of us interested in the art and practice of collective learning” (p. 16). Senge went on to say, “for citizens, the dialogue about why contemporary organizations are not especially good learners and about what is required to build learning organizations reveals some of the tools needed by communities and societies if they are to become more adept learners” (p. 16).

Short (1998) stated that, “noticing is not enough, it is action that creates change and learning, not understanding” (p. 18). In order for community engagement to be meaningful, we must also have the governance structures that will allow us to move beyond just knowing what the sustainability issues are in our community. If, in local government, and the public sector, the goal is to make a difference in the quality of life of those that we serve, we need to move the
discoveries from engagement into meaningful change. This is the goal of action research, this research project and the driving force behind the creation of the OICRD more than ten years ago, “if traditional government agencies are unable to produce accepted solutions, then communities of the public must create the capacity to interact, share power, and find shared problem definitions with paths to solutions” (Booher, 2004, p. 34). In 2001, there was a perceived lack of community development happening in Olds. The OICRD was formed in order to find better solutions; and, much has changed since 2001. In Olds change is happening; however, there is a sense among some that it is not happening quickly enough. This phenomenon reflects Crozier’s (2010) research in which he noted that in similar situations, “there is a sense that although things may be changing, there are opportunities opening up that have the potential to reinvigorate democratic practice” (p. 505).

Community building has certain inherent political overtones, what Nalbandian (1999) refers to as conflict, “politics involves the art of recognizing and balancing legitimate, conflicting values. Questions of values really are ‘no right answer problems’, and they almost always involve difficult choices, which means conflict” (p. 2). Mendel (2010) noted that the distinction between private and public “generates a dual system of government where each regulates the affairs of their members; exercises influence over non-members; and provides context and a framework for the expression and resolution of conflict” (p. 723). Crozier (2010) suggested that, “often missing in these analytical approaches is the issue of how the relationship between politics and policy is reconfigured and reoriented in the new governance patterns that have emerged” (p. 506). Our research explored how wide engagement with those potentially affected prior to policy work within these new patterns can add to meaningful action. More specifically, Chartier
(2002a) wrote that it is not about policy development at all, “the grease that moves these five disciplines along is *Dialogue*. The fine old fashioned art of the conversation, not key messages, storyline or policy guides, but true ongoing respectful conversation” (p. 7). Our research also looked at the role that communication plays in moving dialogue to action in this world of constant change. Booher (2004) stated:

> Rather than the goal of a final agreement, here the goal is ongoing collaboration in decision making about programs and projects to be initiated, actions to be taken, evaluation of the results of the decisions, and change in either the actions or the initiation of new action. (p. 39)

We often think of organizational change as an event; and, this mental model of organizational change has led some to refer to the process of organization evolution as “changing” as opposed to change. Burke (2009) citing Weick and Quinn requested scholars focus on “changing” instead of “change” in order to appreciate that change never stops and that change is hardly determinate and causal.

> If the OICRD wants to continue to use sustainability as its planning framework, we need to transform our understanding of sustainability, as a way of being as opposed to a way of doing (Barrett, 2010). This will require better communication of the vision and purpose of the OICRD.

**Strategic communication during change**

Communication may be the great enabler when it comes to changing organizations. Johansson and Heide (2008), Senge (2006) and Fritz (1989) suggested that any change is intertwined with simultaneous deeply held beliefs and notwithstanding the change that may occur at the communicative level, there may be little real change on a deep structural level. Weick (1999) observed that the main barrier to new thinking about organizational change is
researchers’ ontological and epistemological commitments. Mendel (2010, p. 719) suggested that by making use of “private government” as a concept that includes the nonprofit sector as a component of the larger civil society will make more clear the advocacy actions or communication function nonprofit organizations require in order to change.

Communication and organizational change are inextricably linked processes, according to Lewis (2007). However, communication can be much more than an organizational function, “the interaction among stakeholders can be conceived as a negotiative process aiding mutual goal accomplishment. Communication is the means by which such negotiation takes place” (p. 179). Communication can help to change deeply held beliefs by helping individuals make sense of change, regardless of if it is planned change or change due to catastrophic or unforeseen circumstances. Further, these sense-making processes are fundamental for the outcome of planned change, since sense-making is a significant process of organizing (Johansson & Heide, 2008) and bridges individual and group thought. The concept of the third space, which will be explained on page 29, creates what Bolman and Deal (2008) referred to as an, “arena where issues can be renegotiated and new coalitions formed” (p. 379). These spaces, when understood as to their purpose, can help to increase the understanding and participation of those who identify with the OICRD and support the Institutes efforts by creating a social identity people can relate to.

The social identity is “that part of an individual’s self-concept which derives from his knowledge of his or her membership of a social group (or groups) together with the value and emotional significance attached to that membership” (Elvin, 2005, p. 132). Narrative is a form of communication that is important in sense-making processes and learning, since stories help
people structure their lived experience (Anielski, 2007). Booher (2004) stated that this type of communication includes not only logic-based reasoning but also other forms of dialogue such as storytelling, role-playing, and acceptance of emotion. This stands in opposition to the traditional understanding that communication only reports or represents something already existing (Austin, 1962).

Johansson and Heide (2008) stated that, “communication is thus the very medium within which change takes place” (p. 294) and that “stories, myths, rituals, and language are not simply reflections of organizational meanings; they are the ongoing processes that constitute organizational life” (p. 291). Johansson and Heide emphasized that the most powerful change interventions occur at the level of everyday conversation. The OICRD could conceivably include community organizing, community structure, community power, and decision making as part of their ongoing conversation (Mendel, 2010, p. 721).

Not all of the literature agrees on the transformative effect of various types of communication. Langer and Thorup (2006) suggested that change communication based on a storytelling approach would result in further frustration as opposed to greater clarity. Others including Glesne (2011), Stringer (2007), and Coghlan and Brannick (2010), suggested that what needs to be communicated is how the planned change is to be implemented. Elving (2005) citing Tornatzky and Johnson defined implementation as, “the translation of any tool or technique, process, or method of doing, from knowledge to practice” (p. 193). Coghlan and Brannick suggested a continuum of knowledge creation that moves from experiential knowledge to presentational knowledge to propositional knowledge and finally to practical knowledge (p. 36). Communication plays a critical role when moving across this continuum and sharing
experiences. According to Mendel (2010), a fundamental challenge to successfully communicating with the public is an imprecise nomenclature to describe the nonprofit sector. “The fuzzy terminology is also a barrier to public officials and business leaders who rely on the nonprofit sector to administer public policy and support overall health and well-being of [our] cities and communities” (p. 727). Mendel suggested that there are three dimensions of civil discourse that are assigned to the nonprofit sector to be exercised (Table 1).

**Table 1: Dimensions Assigned to Civil Society as Exercised Through Nonprofits**

<table>
<thead>
<tr>
<th>I</th>
<th>II</th>
<th>III</th>
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<tbody>
<tr>
<td>As a process for intertwining public and private players in decision making and in allocating resources outside the bounds of government</td>
<td>As a continuum of actions arising from the participants of that process which consist of individuals or organizations</td>
<td>As the outcome of that process which consists of an aggregate of rules and customs or characteristics that comprise American culture and freedoms</td>
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A review of the literature on the relationship between communication and organizational changing suggests that communication creates the potential for commitment to changing and that an organization must be seen as an emergent property of changing. The literature also suggests, as argued by Real and Poole (2005) that, “without implementation, the most brilliant and potentially far-reaching innovation remains just that—potential” (p. 64).

**Sustainability/strategic planning, change and organizational learning**

The Olds Institute is adept at traditional strategic planning and has used TNS techniques to adapt this framework for their sustainability planning. The practice of backcasting espoused by TNS using the framework of creating tension between vision and current reality as a way to
examine systemic issues and develop goals, strategies and action plans is entrenched in OICRD practice. Organizational learning requires first unlearning or at least understanding the beliefs that underpin the organization. Senge (2006) wrote that, “if structural conflict arises from deep underlying beliefs, then it can change only by changing those beliefs” (p. 148). Senge referring to the work of Robert Fritz, illustrated a phenomenon called *structural conflict*. Creative tension is produced by having a strong vision that pulls you from your current reality; structural conflict adds a second tension pulling back towards beliefs based on powerlessness and unworthiness (p. 140). These counter balancing tensions make moving from our current reality very difficult and requires us to frame our governance work differently in a generative way. Framing questions differently may lead to better understanding of structural tension.

**Generative Governance**

Seel (2008) formerly the Director of the Institute for Non-profit Studies at Mount Royal University, has developed a Global Governance Model (figure 2) that suggests a continuum of public body governance choices. As an organization moves from fiduciary to strategic to generative governance, a differentiation between the organization and the community occurs. This differentiation brings into focus the need for collaboration as the organization understands that it is part of a larger whole.
Defining generative governance

In what is surely seminal work in the field of generative governance, Chait et al. (2011) depicted a spectrum of governance functions moving from fiduciary to strategic to generative (Table 2). Generative governance engages and challenges trustees intellectually. It is what leaders do best. Yet most boards spend most of their time on fiduciary work, and devote little time to the generative mode. Governance as leadership as posited by Chait et al. depicts a different definition of leadership; one in which leaders enable organizations to confront and
move forward on complex, value-laden problems, that defy a “right” answer or “perfect” solution. This type of leadership requires a different mindset, one beyond fiduciary stewardship and strategic partnership. In this model, performance is measured by an increase in learning and discernment and not strategic indicators and competitive analysis.

**Table 2: Summary of Board Behaviours**

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<th>Fiduciary</th>
<th>Strategic</th>
<th>Generative</th>
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</thead>
<tbody>
<tr>
<td><strong>Key Question</strong></td>
<td>“What’s wrong?”</td>
<td>“What’s the plan?”</td>
<td>“What’s the question?”</td>
</tr>
<tr>
<td><strong>Board Focus</strong></td>
<td>Define problems</td>
<td>Solve problems</td>
<td>Frame problems</td>
</tr>
<tr>
<td></td>
<td>Review performance</td>
<td>Shape strategy</td>
<td>Engage in sense-making</td>
</tr>
<tr>
<td><strong>Board Process</strong></td>
<td>Parliamentary procedure</td>
<td>Logical and empirical discussion</td>
<td>More informal and creative</td>
</tr>
<tr>
<td><strong>Problems are to Be</strong></td>
<td>Spotted</td>
<td>Solved</td>
<td>Framed</td>
</tr>
<tr>
<td><strong>Decision Making</strong></td>
<td>Resolution</td>
<td>Roaching consensus</td>
<td>Framing the question</td>
</tr>
<tr>
<td><strong>Board Sees Their Role As</strong></td>
<td>Oversight &amp; authority</td>
<td>Strategist</td>
<td>Fresh perspective</td>
</tr>
<tr>
<td><strong>Performance Metrics</strong></td>
<td>Facts, figures, finances, reports</td>
<td>Strategic Indicators, competitive analysis</td>
<td>Signs of learning and discerning</td>
</tr>
</tbody>
</table>

Adapted from: *Governance as Leadership: Reframing the Work of Nonprofit Boards*. Chait, Ryan & Taylor.

Chait et al. (2011) compared what other authors refer to as sense-making with problem framing in their governance as leadership model. A fiduciary focus is one of defining problems; a strategic focus concentrates on solving problems. Boards that adopt a generative focus frame problems in different ways in order to look at problems through different lenses and gain fresh perspectives.

Rothman (2000) wrote that community development practitioners, “have to break out of established agency or discipline loyalties, allowing the common good or wishes of the
community to prevail over one’s personal interests or those of one’s professional or sponsoring organization” (p. 103). Breaking free from these loyalties and established mental models reveals possibilities for innovation and collaboration.

The link between generative governance and collaboration

Collaborative governance has emerged as a response to the failures of downstream implementation and the high cost and politicization of regulation. It has developed as an alternative to the adversarialism of interest group pluralism and to the accountability failures of managerialism (especially as the authority of experts is challenged). More positively, one can argue that trends toward collaboration also arise from the growth of knowledge and institutional capacity. As knowledge becomes increasingly specialized and distributed and as institutional infrastructures become more complex and interdependent, the demand for collaboration increases (Ansell & Gash, 2008). Collaborative governance requires the right conditions to be successful and is not a panacea for systemic governance problems. Other studies point to problems that collaborative strategies encounter as they pursue alternative outcomes, “powerful stakeholders manipulate the process; public agencies lack real commitment to collaboration; and distrust becomes a barrier to good faith negotiation” (p. 561). Collaboration alone may not lead to better results; collaboration combined with a generative orientation is a better model.

The term generative means to generate new ideas, concepts and processes that previously did not exist. Generative thinking looks at possibilities through different lenses and leads to creative and innovative solutions to challenges and ways of operating. Generative thinking is individual, but generative systematic shifts are collaborative and include board members and
often the constituents benefitting from community development work and/or those represented by various stakeholders (Hora & Millar, 2011).

We were introduced to the concept of the third space in a report by Negropontes (2011) when she wrote about the governance structure of a joint venture in Olds between Olds College and the Chinooks Edge School Division. Dr. Negropontes referred to this type of partnership as the “third space” or a new arena for activity. Negropontes (2011) citing Hora and Millar outlined the benefits of thinking of partnership as occurring in a third space as:

Shed[ing] light on the cultural dynamics of cross-organizational work. It helps us see partnerships as emergent and multivocal in nature, as organizations evolve over time as group members negotiate and begin to use new shared meanings. Researchers who study interorganizational relations also emphasize the unpredictable nature of collaborative work and the fact that the absence of familiar organizational structures and routines create a working environment that is characterized by change. The unpredictable nature of the third space holds both challenges and promises. It is challenging to create an entirely new organization comprising people from diverse backgrounds, often with demanding timelines and limited resources. At the same time, creating new organizational structures, relationships, and practices provides the opportunity for new ways of thinking and acting to emerge. Over time, if a group’s members work well together and begin to develop a shared sense of identity and language, new cultural modes may also emerge. Such creation of new cultural dynamics is powerful and transformative. The third space has a strong potential as a learning environment because it invites, indeed requires, creativity and the application of diverse forms of knowledge to new problems. Thus, the routine expertise you have developed in your home organization may or may not be well suited to your partnership tasks, since these represent a new set of problems and situations. Instead, you likely will need to adapt to your expertise and knowledge to these tasks, an approach that is a cornerstone of innovation and creativity. (p. 45)

Generative governance and the third space may clarify relationships between the four essential members and the Board and Committees and provide better ways to improve implementation of sustainable strategies to community development that the OICRD currently struggles with.
Facilitative leadership, collective learning and generative governance

Generative governance as leadership posited by Chait et al. (2011) within community development requires the development of a common vision. A vision developed for the community, by the community. Schachter (2011) citing Fiorina argued, “that civic engagement can only have healthy consequences when those actively engaged represent the values of the entire community” (p. 704).

Facilitative leadership practitioners must combine the full spectrum of leadership starting with what motivates the individual to do something that he/she would not otherwise do, however, it cannot stop there. Helping others to understand their gifts and how they can make their community and civil society better must be the highest objective. Creating an environment and opportunities for these gifts to be used is perhaps the highest achievement of a leader. The creation of a third space where leadership skills and learning can be developed and practiced is a noble vision, “the problem lies in convincing people to start getting involved” (Schachter, 2011, p. 704). Schachter suggested that citizen formation in itself constitutes a significant democratic project. Creating an actual physical space for discourse and research where practitioners and other stakeholders can engage in cooperative enquiry into the science of learning, may increase engagement and, in turn, the possibilities for reinvigorating democracy.

There seems to be a divergence between the direction of the marketplace and the need for collective learning. Cory Wentzel, Executive Director of the Department of Extension at the University of Alberta cautioned that the economic marketplace is devolving to an individual-
centric orientation as content marketing evolves. From a community development perspective, Wentzel said:

The devolution towards the needs of the individual citizen, fragments democratization. The emerging definition of professionalism within the context of service to the public, needs to be highly strategic in perspective and in action. If the quality of life indicators, are clearly defined, represent a consensus of public will, and through data collection and fast action, responsive actions, are performed better, faster and cheaper, all the while promoting a collective set of values that define the Democratic will, this aggregating up, should be the higher objective. (C. Wentzel, personal communication, January 23, 2013)

One of the reasons cited for this devolution to the needs of individuals is that “voluntary organizations have turned away from a governance model most likely to develop engaged citizens” (Schachter, 2011, p. 710). Schachter suggested the result is well expressed as a crisis of civic membership. A colloquial term for this crisis is STP syndrome (same ten people). To achieve vibrant democratic organizations, power needs to be distributed amongst an organization’s membership as a first step and then leaders must facilitate sense-making collective learning. The performance metrics within these organizations is built around signs of learning and discerning (Chait et al., 2011).

**A return to the philosophic tradition**

The third space is tantamount to re-creating the agora and the philosophic tradition; the philosophic tradition of reason and truth that has been “buried and obscured under so many layers of misinterpretation and distortion visited upon it by generations of aggressive ultra-modernist dogma that it has become barely recoverable” (Jackson, 1996, p. 26). The concept of the third space is an example of what Senge (2006) and other writers referred to as unlearning or...
breaking mental models in order to reframe issues and through dialogue create new possibilities or perhaps return to former traditions.

The philosopher Jean Jacque Rousseau (1754) suggested that man in a natural state is at peace and there is inherent equity between individuals in nature. Rousseau suggested that the mark of a truly great leader is one that can lead people back to a natural state where happiness and contentment is found. Rousseau was unable to find any example of that in his society of 1750. He reasoned that leadership was too self-centred to be mindful of the wellbeing of others. This lack of what Rousseau saw as leadership left his work a “ponderous lament” (Jackson, 1996, p. 27) of what society might be. The work of Anielski (2007) and others around genuine wealth and the national and international research into wellbeing and happiness is a search for the contentment that Rousseau philosophized.

Leadership studies and the study of civil society, including private and public government, when coupled with the goals of action research, hold promise for better outcomes to community development work. It is not without its challenges though. Hinck (2010) in her address to the 2010 Meeting of the National Communication Association Conference spoke about nonprofits in connection to social movements and counterpublic movements. There is so much polarity on so many civil society matters because of entrenched positions that it will require great care and purpose to allow these positions to be brought into the agora and suspended long enough to allow sense-making within our local context to take hold.

The lament of Rousseau is still reflected by the G8 and G20 protests and the recent Occupy movements. The movements could be considered counterpublic, “focusing on getting away from what we don’t want, rather than on creating what we do want” (Senge, 2006, p. 146).
The review of literature on the topic of counterpublics suggests that there is no consensus on the purpose or definition of these types of anti-movements. Senge (2006) suggested that unless these movements evolve and become a movement for positive change, they are bound to the same fate of ponderous lament that discouraged Rousseau.

There is hope to understand and to use the energy of these counterpublics within the agora to improve community development work. In April of 2012, the Olds Advisory Group for Sustainable Living hosted a one-day public engagement titled The Other Side of Occupy (OICRD, 2012). Olds is too small of a community for the Occupy movement of 2011 to descend upon, but the OICRD considered what it would do if the Occupy movement set up in Centennial Park in Olds. The community planned from its practice of dialogue and inclusion not from a position of adversarialism and conflict. Juxtaposing these positions was a powerful exercise and provided a proactive space for this type of exploration to occur. It also conjured images of Plato and Aristotle in the agora discussing the counterpublic concerns of their day. A return to the philosophic tradition and reason may uncover the wisdom of Rousseau and a return to man having “a more meaningful place in the universe” (Senge, 2006, p. xvi).
CHAPTER THREE: METHODOLOGY AND APPROACH

In this section, the chosen methodology and the over-arching framework is defined in addition to the rationale for how the inquiry approach is a fit for the OICRD based on the research question: how can shifting the governance model in the Olds Institute for Community and Regional Development improve community engagement with sustainability planning and implementation? The criteria and rationale for the chosen participants and the methods are outlined in addition to detailing how the study was conducted and data analyzed. Acknowledging ethical issues concludes the section.

Inquiry Approach

The philosophical approach of our inquiry was qualitative as opposed to quantitative in nature. We began from an interpretive approach (Glesne, 2011, p. 9) which suggests that reality is socially constructed as opposed to being objective or fixed and measurable. Our approach was based on the assumption that we create or construct the reality that we hold as being true (Stringer, 2007, p. 41).

Action research is primarily a qualitative methodology, sometimes using mixed methodology, which has subjectivist ontology and an objectivist epistemology of the world (Coghlan & Brannick, 2010, P. 41). A subjectivist ontology suggests that we as individuals create our own reality of the world (Coghlan & Brannick, 2010; Glesne, 2011; Stringer, 2007) and that as individuals share their individual experiences they co-create a joint reality (Senge, 2006; Stringer, 2007). An objectivist epistemology suggests that the nature of knowledge is outside of the individual and is based in higher-level theory but is experienced and interpreted
through the senses (Glesne, 2011, p. 5). Stringer (2007) defined action research as a systematic approach to investigation that enables people to find effective solutions to everyday problems (p. 3). He went on to suggest that all people who affect or are affected by the issue being investigated should be included in the process of inquiry (p. 6), and that policies and programs should not dictate specific actions and procedures but instead should provide resources to enable effective action that is appropriate to particular situations (p. 3). Coghlan and Brannick (2010) defined action research as research in action rather than research about action (p. 4). There are various models for this type of research; specifically, we used the Organizational Action Research (OAR) model developed by Royal Roads University (Appendix C). The OAR model employs multi-loop or iterative cycles of inquiry. Our initial inquiry into governance and engagement will complete what the OAR model calls the organizational readiness cycle. The model includes a transition zone for handing over our research to our sponsor who then becomes responsible for the subsequent cycles: implementation and sustaining change.

Considering that this inquiry is concerned with the optimal governance option to enhance engagement between the OICRD Board of Directors; its essential member boards; its committee members, the data collection and analysis methods; participants invited, and the recommendations developed all begin from this relationship. The term “methods” generally refers to “a procedure, tool or technique used by the inquirer to generate and analyze data” (Schwandt, 2007, p. 191). We used two methods for data collection in our research. First we conducted a focus group with the three past chairmen and the current executive committee of the OICRD. There has been a high degree of academic rigor that has gone into defining and refining our inquiry question and sub-questions. The purpose of the focus group, and the selected
participants was to validate and answer the inquiry question and sub-questions and then to develop a set of questions for the second method. The focus group questions are attached (Appendix D). The design and selection of the focus group participants is an attempt to bring together the past, present and future of the OICRD in order to map out the governance framework that best fits with engagement and empowering committees to implement the community sustainability plan (Stewart, Shamdasani & Rook, 2007).

The second method used was a survey. Survey questions are attached as Appendix E. These questions were refined and perfected with the help of the focus group participants to ensure those that are responsible for the implementation of the recommendations of this report have ownership of the results. Our goal with the second method used was to engage a large number of people that have a direct connection to the type of governance approach the board of the OICRD employs. The number of participants invited to participate in this second method was 95 people so choosing the correct method was very important. I considered a number of possibilities for this phase of our data collection. Both Appreciative Inquiry as a method, and Court Yard Café were given consideration for this phase of data collection but the benefit of having some numeric aggregation as part of our research and conclusions was deemed important to ensure that the focus group and survey results aligned (Stringer, 2007, p. 78).

**Participants**

The OICRD has been incorporated since 2001 and is currently operating under its fourth Board Chair. The selection of the focus group is what Stringer (2007) referred to as a critical reference group (p. 45). I took an appreciative questioning approach (Cooperrider, Whitney &
Stavros, 2008) to this focus group surfacing the best of the past, what is currently working, and dreaming about the type of governance and engagement required for the future.

The second method used was a survey and included the board and council members of the four essential members of the OICRD; the Olds Agricultural Society, the Olds and District Chamber of Commerce, Olds College, and the Town of Olds. The survey also included the committee chairs and current committee members; this comprised the 95 people that the survey was distributed to. This purposeful sampling (Glesne, 2011, p. 44) was chosen because of the overall focus of our inquiry. The readiness for change required a common understanding by all participants of the intended relationship between the OICRD Board and committee members. The second cycle of implementation may require further inquiry and different sampling. I did not experience or exercise any undue influence within the data collection outlined here.

I used an advisory team to assist with data collection and analysis. The team consisted of the Executive Director of the OICRD, a meeting and logistics coordinator, a writer to proof read our final report for grammar, syntax and APA conformity, and a PhD well versed in qualitative social research to assist with research process and data analysis.

Inquiry Methods

Data collection tools

The literature review for this project suggests a number of reasons why a focus group is a good fit for this inquiry. Glesne (2011) stated that a focus group can be valuable as a pilot study and in assisting in creating the research design (p. 130). A focus group can also be valuable in providing important context that may not be available from other types of research design.
processes. This was my experience. The fact that all of the past chairs remain involved with the OICRD at the committee level is a testament to the spirit of the OICRD. The context and nuances from the focus group not only helped to create a relevant list of questions for the survey but also strongly suggested that this model for community development in Olds is still powerful and applicable.

When considering the cycles of action research and the processes used by the OICRD there is a sense that some actions of the organization may be too haphazard and not informed enough by the requisite cycles of observation and reflection (Coghlan & Brannick, 2010; Senge, 2006). The focus group provided a great balance of inquiry and advocacy when testing assumptions regarding this sense of haphazard actions. These assumptions were further tested in the second method used as part of this research. Stringer (2007) has laid out a seven step process for conducting focus groups that was used as a framework to design and facilitate this method (p. 74): which include, set ground rules, explain procedures clearly, facilitator role, recorders role, plenary sessions, combined analysis, and action planning.

The second tool or method used was an online survey. Organizational surveys usually have a theme (Burke, 2009, p. 301). The theme of this survey related back to the main research question and sub-questions regarding governance approach and engagement of the OICRD Board. The survey narrowly focused on the governance relationship between the Board and its committees and how best to engage and sustain committee activity. This method was selected so that the research captured both quantitative and qualitative data; “The major purpose of organizational surveys… begins with the purposes that are primarily assessment-related and ends with the purposes that are primarily change-related” (Burke, 2009, p. 303). Surveys are valuable
for capturing both a mix of assessment and change related data. Questions for both the focus group and the survey are included as Appendices C and D respectively. The use of both mixed and multi methods were used to ensure a robust process and some statistical procedures.

**Study conduct**

I as the researcher recruited members to form an advisory team to assist with data collection and analysis for this project. I first met with the Board Chair who is my sponsor and the Executive Director of the OICRD to discuss their formal and informal roles within this inquiry. The Chair was involved as a member of the focus group and received the report on behalf of the organization. The Executive Director, who would have a major role in the implementation of the recommendations, was part of our advisory team. The OICRD is a nonprofit volunteer organization and has been successful in designing and delivering large scale community engagement events and has capable volunteers well versed in the facets of community research. Along with the Executive Director and me, the advisory team included a logistics and meeting coordinator, a writer, and a PhD for process expertise. Members of the advisory team were recruited individually in person by me, the researcher.

Once the advisory team was confirmed, the work of inviting participants began. The makeup of the focus group was confirmed with the sponsor and was deemed to be appropriate for the research goals. The makeup of the focus group was discussed with the advisory group. Once confirmed I sent out letters of invitation to the proposed members of the focus group. Attendance was confirmed and the meeting was set; all 6 invited participants attended. The 90 minutes scheduled was not sufficient for the stories and background that this group
enthusiastically shared and after 3 hours we agreed to meet for a second sitting. Unfortunately because of various commitments and my need to move to the second method of data collection, one of the 6 was not able to attend the second meeting.

The results of the focus group influenced the design of the second method; accordingly the invitations for the survey did not go out until the data analysis and survey questions had been finalized. Again, I sent invitations for the survey. Copies of the questions for both methods are included as Appendices E and F. The focus group participants piloted the survey questions following Stringer’s suggested approach (2007, p. 79); select a small pilot of sample respondents, have them complete the questionnaire or respond to focus group questions, analyze responses to identify problematic or inadequate questions, and modify those questions.

The focus group was facilitated by me as the action research practitioner. Deb Martens from our advisory group accompanied me to both focus group sessions and recorded and wrote the data report. The survey was conducted online using Fluid Surveys. As stated, the focus group results informed the design of the survey.

Validity in qualitative research is not the same as traditional tests of generalizability or reliability in quantitative research; this is the nature of action research. Qualitative research relies on authenticity and trustworthiness to ensure valid results (Coghlan & Brannick, 2010). The authenticity of the focus group results was ensured by the group members checking the final set of questions that were used for the survey. The authenticity of the final conclusions and recommendations will be the responsibility of the advisory team to ensure that they are; “an authentic reflection of the personal or lived experience of the phenomenon under investigation” (M. MacLeod, personal communication, July 23, 2012).
As stated, the second cycle of the organizational action research model is implementation. The final recommendations will be reviewed with the sponsor and the advisory team, of which the executive director is a part, to discuss the implementation cycle of the model. My hope is that the recommendations are valuable to the OICRD and I hope to be able to remain active in the implementation and sustainability cycles of change that come from this action research project.

**Data analysis**

For the most part data collected was non-numeric in nature. Analysis and interpretation of non-numeric data requires different processes than scientific analysis. Qualitative data requires two major processes in order to distill the data (Stringer, 2007, p. 98): categorizing and coding, and identifying key experiences. Stringer outlined six steps for categorizing and coding data: reviewing the collected data, unitizing the data, categorizing and coding, identifying themes, organizing a category system, and developing a report framework. Regarding identifying key experiences, Stringer suggested a five step process: review the data, identify key experiences, identify main features of each experience, identify the elements that compose the experience, and identify themes. Our intention was to use this framework for both collection methods with one significant difference being that, with the focus group, we developed the report framework as part of the member checking process in order to enhance authenticity and save time. Our actual experience was that data analysis is more art than science and the relationship between categorizing, coding, theming and creating anything that resembled a system was open to debate. Analyzing, interpreting and unpacking key experiences was initially attempted by me at the
request of my advisory team and then with the help of the advisory team throughout the cycles of analysis to ensure and maintain authenticity and trustworthiness. Findings were shared with the advisory team and then I wrote the conclusions and recommendations which were reviewed by the advisory team and then by my sponsor.

Coghlan and Brannick (2010) defined authenticity according to four process imperatives; being attentive, being intelligent, being reasonable, and being responsible (p. 154). These imperatives became the guide that we aspired to reach. Glesne (2011) wrote “most agree that we cannot create criteria to ensure that something is ‘true’ or ‘accurate’” (p. 49). A proxy for authenticity and truth in qualitative research is what many authors refer to as trustworthiness (Coghlan & Brannick, 2010; Glesne, 2011; Senge, 2011; Short, 1998; Stringer, 2007); “Checks for trustworthiness, therefore, are designed to ensure that researchers have rigorously established the veracity, truthfulness, or validity of the information and analysis that have emerged from the research process” (Stringer, 2007, p. 57). An understanding of the ethical framework and guidelines was invaluable in allowing our work to progress with a high degree of comfort.

**Ethical Issues**

The research needed to consider ethical issues in the two areas of scientific and humanistic requirements. The requirements for theses two areas of inquiry are governed by three primary documents. The Canadian Institute of Health Research, Natural Sciences and Engineering Research Council of Canada, and Social Sciences and Humanities Research Council of Canada have produced the Tri-Council Policy Statement (TCPS) 2010; this along with the Royal Roads University Research Ethics Policy (2011), and the Royal Roads University Policy
on Integrity and Misconduct in Research and Scholarship (2000) guided the ethical conduct of our research. Along with the policy framework of the TCPS and RRU, there is a rigorous ethics review process involving the academic supervisor, the RRU Office of Research, and the RRU Ethics Review Board. This rigor and redundancy is designed to ensure that the application for ethics review is complete and follows policy. Once the review was approved, my responsibility was to ensure that the research was conducted pursuant to the approval and if necessary apply for the appropriate amendments.

There are three core principles that needed to be considered according to the TCPS and RRU policy documents: Respect for Persons, Concern for Welfare, and Justice. Respect for Persons deals with the concept of seeking free, informed and ongoing consent to participate in research. According to the TCPS (2010);

> An informed choice is one that is based on as complete an understanding as is reasonably possible of the purpose of the research, what it entails, and its foreseeable risks and benefits, both to the participants and to others. Respect for Persons also includes a commitment to accountability and transparency in the ethical conduct of research. (p. 9)

Free and informed consent was addressed prior to any research being carried out to ensure participants were sufficiently protected. Consent for the planned focus group was acquired by use of the attached consent form (Appendix F). Consent for the online survey was gained by the attached survey pre-amble (Appendix G). Concern for Welfare ensures that research participants are not exposed to unnecessary risks. This was accomplished by “providing participants with enough information to adequately assess risks and potential benefits associated with their participation in the research” (TCPS, 2010, p. 10). Copies of our letter of invitation to both data collection methods used are included as Appendices I and J. The third and final core principle in
the ethics policy framework is Justice: “justice refers to the obligation to treat people fairly and equitably” (TCPS, 2010, p. 10). Justice suggests that participation, including both inclusion and exclusion practices, should be based on criteria that are justified by the research question. Our research question concerns governance and engagement practices between the OICRD Board of Directors, its essential members and committee members. All members of these groups were invited to participate in the research without exclusion. The other key member of the organization is the Executive Director who was a member of our research team. In my estimation, this research did not put anyone at more than minimal risk. The Royal Roads University (RRU) Policy and Procedures on Academic Integrity and Misconduct in Research and Scholarship, is in place to ensure the integrity, accountability and responsibility of scholarship and research carried out under the auspices of Royal Roads University. This policy and these procedures guided our research and helped ensure that individual and organizational integrity were maintained and my own preferences and biases as an insider action researcher were balanced.
CHAPTER FOUR: FINDINGS AND DISCUSSION

It could be argued that there is really only one finding in our research: communication needs to be better. That may be, but the function and role of communication is changing and notwithstanding the many faces of communication in this technology-pervasive world, dialogue and simple direct contact evident in the focus group video is also a major theme in the results from the survey. This strong link between a perceived lack of communication and the desire for direct contact has led us to believe that reference to communication is really a metaphor for better relationships within the OICRD.

Study Findings

Olds is a small community that is comparatively very well connected; because of this, there was widespread knowledge of our research work in the community. The OICRD is a well-known organization but, evidently, not well understood. Our direct experience with the OICRD and its committees required special consideration when trying to ensure the findings were valid and authentic to the research data. We believe that with the help of our Sponsor, Academic Supervisor and Advisory Team the following findings capture the current reality regarding governance and engagement in the OICRD:

1. Communication and information sharing needs to be enhanced.
2. Relationship building among the Essential Members and Committees and Committee Members needs to be part of the ongoing work of the Board.
3. Focus and alignment of the work of the Board and Committees needs to be better.
4. Learning at the personal, organizational and community level needs to be a focus.
5. Resources and capacity are always a consideration.

Each of these findings will be expanded upon below. Direct quotes from our research will support each topic where appropriate. Each finding will conclude with an analysis of the finding theme and how it relates to the literature reviewed for our research. Overall conclusions from our research follow the findings to end this chapter.

**Finding One: Communication and information sharing needs to be enhanced.**

The overwhelming theme from our research suggests that communication and information sharing is the primary need lacking at the OICRD. Above we suggested that the OICRD is a well-known but not well understood organization. This comment captures the OICRD; there is a tremendous amount of work being done regarding community issues such as physician recruitment and retention, fair trade, social development, and heritage management and much more under the umbrella of the OICRD but the connection between these issues/groups and the OICRD is not always understood. Even among those that are involved in committee work, the understanding of the work of other committees is underwhelming. The survey for this research was sent out to 95 volunteer members connected with the OICRD. Sixty-one respondents answered the question: are you aware of what is happening with all/other committees of the OICRD? In responding to the question 72%, 44 of 61 respondents identified themselves as not knowing what other committees were working on, even though these people supported their own committee work and supported the OICRD.
Table 3: Awareness of Committee Work

<table>
<thead>
<tr>
<th>Response</th>
<th>Chart</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware</td>
<td></td>
<td>5%</td>
<td>3</td>
</tr>
<tr>
<td>Passive</td>
<td></td>
<td>23%</td>
<td>14</td>
</tr>
<tr>
<td>Not Aware</td>
<td></td>
<td>72%</td>
<td>44</td>
</tr>
<tr>
<td>Total Responses</td>
<td></td>
<td>61</td>
<td></td>
</tr>
</tbody>
</table>

The topic of communication and information sharing was a constant theme in both the focus group and in the survey results. The survey question regarding committee awareness was included because it was a major theme in the focus group research. Examples from different focus group members included one participant noting, “coordination is lacking, committees do not know what other committees are doing”, while another stated “there is a gap between committees, committees do not communicate”. A third participant said “committees need to educate each other because we are confined by what we know and what we don’t know”. Focus group members suggested that the need for good communication has been recognized since inception but the communication function has never been developed to a level that is deemed acceptable. Survey responses were similar to comments from the focus group, a sampling from different survey respondents include: “create opportunities for cross informational sessions where the committees can expand on the work before OICRD audiences”, “develop a brief ‘newsletter’ (one page) with highlights from the various committees to be sent twice a year electronically to all committees' members”, and, “quarterly reports to the community, where every committee chair submits, are needed”. There are more examples of communication and
information sharing being deficient. The possible solutions to the need for better communication ranged from the simple “newsletter or updates quarterly to be on the agenda of all committees” and “general newsletter by email” to the complex:

An online social/communications network to be accessed and viewed by all those working within the Olds Institute. Not unlike email but with more hands on features like instant file sharing, committee status updates, peer to peer chat, etc. This, from what I understand, is already in the works and once complete will be an essential tool.

Where responsibility for communication lies was not as consistent as the need for enhanced communication, some suggested it should be a function done by a communications coordinator, noted one survey response “communication and more communication, a communications coordinator?” Others stated that Board members should attend committee meetings and provide reciprocal reports. A response to the question “what advice would you give the OICRD Board of Directors to improve engagement between the Board and your organization or committee” was “come to a meeting, send different representatives to various meetings, and value the work of the committees”. There were suggestions that the noted task above should be the responsibility of committee chairs while others suggested that individuals need to take personal responsibility to be informed: “the structure in place is effective, there is so much information out there I am not sure how much is actually absorbed by the majority”. There were many different suggestions regarding the format of the communication. Email and online collaborative spaces, newsletters, monthly, quarterly and annual reports and radio spots were some of the examples. The survey asked an appreciative inquiry question to gain an understanding of what a vision of ideal engagement might look like in July of 2014. Many of the
responses suggested that community television and internet services offered by O-NET could provide some communications solutions. One particular example is poignant:

Olds Fiber project is a success and citizens are networked by fibre and are able to share with each other at a level of social networking unimaginable in 2013. Awareness of what is happening in and around the community has tripled. People have become more engaged because of this increased awareness of their surroundings and realize that they, the community is responsible for this improvement.

The need for enhanced communication and the difficulty identifying what good communication is not surprising and is supported by the scholarly and professional literature. In his work Mendel (2010) cited noted scholar Henry Mintzberg’s keynote at the 31st Annual Conference of the Association for Research on Nonprofit Organizations and Voluntary Action. Mintzberg blamed the confusing terminology that we have developed in the nonprofit sector as a “mess of nomenclature” that is so confusing and imprecise that he proposed that the nonprofit sector does not exist. Stuart suggested that, “we have confused ourselves, obscured the role nonprofits play in our society, and created an unnecessary barrier to nurturing political, economic, and social pluralism” (p. 719). The professional literature on communications in the nonprofit sector suggested that in order for the communication function to be valuable and “for a nonprofit to thrive, it must fulfill a mission that is valued by the community, staff, board, and funders” (Lewis 2005). Lewis went on to suggest that in the nonprofit sector this is easier said than done:

Kanter and Summers (1987) argued that NPO missions are notoriously difficult to measure. This is true because NPO missions are usually focused on services and values, and various constituencies (clients, volunteers, private funders, government funders, and communities) view these outcomes very differently. (2005)
Lewis wrote in 2005 that the nonprofit context is one rich with possibility and one deeply neglected from a communication theory standpoint. A review of the scholarly and professional literature suggests that not much has changed since her research. The OICRD is far from unique in its struggles to communicate in an effective and meaningful way with its stakeholders; this is endemic in nonprofit and civil society organizations. The fact that our research uncovered a multitude of needs and suggestions regarding effective communication is a reflection of the diversity that constitutes the OICRD. Both the data and the literature point to a need in the OICRD and the nonprofit sector in general, the need to embrace this diversity and the different communication requirements and develop a communication function that works in this diverse environment. We would be challenged to find a better way to end this finding than this quote by Lewis:

So, although I firmly believe that management communication scholars have a lot to offer the nonprofit literature in bringing experience (methodological), theoretical heritage, and a focus on meaning, messages, interaction, communicative structure, and process, I believe also that increased exposure to and focus on NPOs will enrich and possibly question much of what we hold as theoretical truths within our own discipline... we might very well be making over generalized statements about superior-subordinate relationships, governance and decision making, structure and process, mission and effectiveness, and open systems environments that have only been tested in a fairly limited domain. (p. 250)

Finding Two: Relationship building among the Essential Members and Committees and Committee Members needs to be part of the ongoing work of the Board.

The research suggested that perhaps the raison d’être of the OICRD has been lost and needs to be re-established. The survey question asked: How strong do you feel the engagement and collaboration is between the four essential members of the Olds Institute? Only 2%, one of
the 62 respondents thought that the collaboration and engagement is strong. Some of the direct comments from the survey from the question, “What can be done to improve engagement and collaboration between the essential members of the Olds Institute?” include:

“I feel as though the Chamber does not contribute to OICRD initiatives, nor do they help promote them to their membership. There is a lot of initiatives that could be improved with their participation”, and another responder stated “at the committee level, it’s difficult to feel any connection between the four essential members, in my personal opinion, Olds Agriculture Society, and Olds College are interested in the Institute when it serves a benefit for their purpose, but it feels like a one sided relationship”, a third response: “The Town of Olds needs to have better support for the different groups, I have watched them change their minds on different projects depending on the political flavor”.

**Table 4: Collaboration & Engagement between Essential Members of the OICRD**

<table>
<thead>
<tr>
<th>Response</th>
<th>Chart</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong</td>
<td></td>
<td>2%</td>
<td>1</td>
</tr>
<tr>
<td>Passive</td>
<td></td>
<td>53%</td>
<td>33</td>
</tr>
<tr>
<td>Weak</td>
<td></td>
<td>45%</td>
<td>28</td>
</tr>
<tr>
<td><strong>Total Responses</strong></td>
<td></td>
<td><strong>62</strong></td>
<td></td>
</tr>
</tbody>
</table>
The survey also asked about the relationships and understanding of projects and passions between members of various committees. The following question was posed: “are you aware of what is happening with all/other committees of the Olds Institute?” The results of that question can be found in Table 3; 72% of people that responded to this question stated that notwithstanding their involvement with the OICRD, they were not aware of the work being done at the committee level outside of their own particular committee. When asked the question, “what else can be done to maximize effectiveness across the Olds Institute Committees?” the vast majority of the 51 responses suggested some type of newsletter or electronic, radio, or print communications. Some of the other ideas that came from this question included: 1. “Create opportunities for cross informational sessions where the committees can expand on the work before OICRD audiences”, 2. “encourage cross committee connections”, 3. “There must be a committee that looks at the well being of both citizens and the exiting body of governance within Olds Institute. There is a need to focus on the qualitative aspects”, and 4. was “each month have a different committee visit our meetings or have a progress/information report filed”. For as many references to the need for improved relationships, there were just as many suggestions on how to improve relations. Suggested ways to improve relationships between the parts of the OICRD fell into five separate groups: simple communications, collaboration beyond one’s own organization, social opportunities and ways to celebrate, building trust, and, creating interdependence. A representative sample of each of these groups follows in the same order as they are listed above; 1. “there is an elegantly simple Olds Institute website that is effective in communicating to the public what the OICRD is all about, what it is doing now and how volunteers can get involved” is an example of the desire for simple communications, 2. “this is not the same as doing paid
work” is an example suggesting that the OICRD as a volunteer organization built on collaboration is not the same as an organization that has a professional staff, 3. “all members gathering once a year to celebrate the work the organization has done” spoke to the social aspect of the OICRD, 4. “how much of the specifics do we really need to know if we have trust?” is an example of the topic of trust being an important component of the OICRD, and, 5. “frequent dialogue amongst all level and categories of staff, perhaps organize a yearly coordination meeting amongst the governing boards of all four members to periodically re-assess if there is true engagement and collaborations” is one of many references to the need to re-establish interdependence within the OICRD.

The research into nonprofit communication function and the finding of what Mendel (2010) called the “mess of nomenclature”, as well as Lewis’s (2005) writing on the ambiguity of nonprofit mission led us to believe that the widespread reference to communication in our research is really a metaphor for the desire to have different relationships within the OICRD family. From a generative governance, or governance as leadership perspective, Chait et al. (2011) referred to this type of framing problems as sense-making. In simple terms sense-making is the ability of those involved in a sense-making exercise to come to a point where all can say, “that makes sense to me”. This does not require everyone to agree but it creates the environment for different possibilities to be discussed, considered and for fresh perspectives to immerge. This type of relationship building requires different approaches and commitments. Rothman (2000) suggested that in the field of community development “CD practitioners have to break out of established agency or discipline loyalties, allowing the common good or wishes of the community to prevail over one’s personal interests or those of one’s profession or sponsoring
organization” (p. 103). The ability to break out of these established patterns requires more than a superficial understanding and appreciation for others’ vision and hopes and face-to-face communication is required for these types of relationships to develop.

Short (1998) wrote that without relationships there are no organizations, furthermore all organizational systems breakdown to two fundamental components, relationships and patterns. Short stated that in order to change a relationship you must understand the patterns that occur and change the patterns. Short wrote patterns are neither good nor bad, they simply are, but patterns are co-created and in order to understand patterns one must notice them at the individual, mutual and systems levels. Inquiry into relational patterns requires respectful and ongoing communication, organizational changing requires a willingness to change patterns that no longer sustain good relationships.

Finding Three: Focus and alignment of work needs to be better.

The mission of the OICRD is “to be the recognized leader in sustainable community and regional development” (OICRD, 2011). Sustainability planning is very similar to more traditional strategic planning except that it encompasses multiple dimensions of community building that are not always considered with business or industry strategic planning. In the case of the OICRD, strategies across the five dimensions of economy, environment, culture, social and governance all need to be developed in order to have a complete plan. This same type of framework is being developed and implemented across Canada because of the federal government requirement for all communities to have an Integrated Community Sustainability Plan in order to access funding from the federal gas tax refund program. In Olds, the Olds
Strategic Sustainability Plan is the official ICSP. The survey question how connected do you feel to the Olds Strategic Sustainability Plan (OSSP)? Revealed the following statistics: thirty-two of the 62 responses, 52%, stated that they feel connected, or very connected to the OSSP. The OSSP and the ten principles that the plan is based on is intended to be a guide to focus the work of the OICRD and its committees. The principles are included as Appendix J.

Table 5: Connection to the Olds Strategic Sustainability Plan

<table>
<thead>
<tr>
<th>Response</th>
<th>Chart</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very connected</td>
<td></td>
<td>8%</td>
<td>5</td>
</tr>
<tr>
<td>Connected</td>
<td></td>
<td>44%</td>
<td>27</td>
</tr>
<tr>
<td>Not connected</td>
<td></td>
<td>23%</td>
<td>14</td>
</tr>
<tr>
<td>Very disconnected</td>
<td></td>
<td>3%</td>
<td>2</td>
</tr>
<tr>
<td>Not sure</td>
<td></td>
<td>18%</td>
<td>11</td>
</tr>
<tr>
<td>Other, please specify...</td>
<td></td>
<td>5%</td>
<td>3</td>
</tr>
<tr>
<td>Total Responses</td>
<td></td>
<td></td>
<td>62</td>
</tr>
</tbody>
</table>

Evidently, there is some discomfort regarding the sustainability-planning framework used by the OICRD. One of the focus group exercises was to have pair interviews exploring the times that the members were most proud of their contribution to the OICRD. One response stated, “the development of the OSSP because of the community involvement; it offered a sense of support; decisions, ideas, thoughts were not just in the hands of the OI Chair”. A different focus group
participant noted that his proudest moment was the renewal of the OSSP in 2011, “the five dimensions of the OSSP provided focus to the Board as well as to the OAGSL. The OSSP provided understanding for the Board, the pillar committees, and the community”. A discussion around the topic of the OSSP ensued among all focus group members. While the group agreed that it was a daunting document, there were benefits. One benefit was learning. “It provided a learning opportunity” was a comment from one of the focus group members. Another benefit was a sense of direction: “the OSSP provided evidence of where the Board wanted to go”. Another benefit that the OSSP process revealed was a common cause: “it provided a sense of cohesion with the Board and the pillar committees”, and “it provided a broad sense of need”, “it provided answers to community needs” all comments that spoke to the benefit of identifying community needs. The OSSP, “provided a sense of ownership to the community because it is a community document”, and the final benefit identified was that it provided two way communication; “it acted as a conduit for Council to the community and vice versa which is what the OICRD is striving for”.

There is a disconnect between the expectations of the focus group and the results of the survey. One member of the focus group predicted, “No more than 30% will feel connected to the OSSP”. At the focus group table the question was asked of one of the current committee chairs, how many members of your committee would understand the connection between your committee work and the OSSP? The response was “I don’t know if I do, but I know that we are doing our part to move the plan ahead”. This sense of disconnect with the OSSP was not shared in the survey results according to the data in Table Five. It was interesting though that there were
very few references to the OSSP in survey responses. One response came from the question regarding what can be done to maximize effectiveness across the OICRD committees:

I think the essential members come together, talk, share, and even collaborate. However, they still tend to function 80% as an individual entity. I am not sure that this SHOULD be changed. They are all very large organizations and it would be unreasonable to think that they should morph into a single entity. However, I feel that maybe more alignment with the OSSP would be important. If you are a member of the OI then you should be willing to adopt and embrace the principles and planning put together by that organization.

The other reference to the OSSP in the survey was in the appreciative inquiry question, “it is April 13, 2013 and you have had a busy day participating in the Sustainable Olds ‘Measuring What Matters’ workshop. You go to bed and have the best sleep ever, when you wake up it is the middle of July 2014. When you reengage with the community and your Olds Institute work you are thrilled to see the type of engagement and activity you always imagined it could be – the way you believe it ought to be. Describe what you see happening. How is it different? Describe what is going on in 2014 that exemplifies the ideal engagement you have always imagined and how the OI Board is supporting that engagement?” The response; “all committees have a work plan that aligns with the OSSP”.

Despite the awareness of the OSSP suggested in Table Five, the plan does not appear to have the effect of providing the focus and strength that committees need in order to feel a sense of cohesion across all that the committees are accomplishing. As discussed earlier in this paper, there are counter balancing forces that determine how far we move from our current reality. Vision pulls us forward but structural conflict, those deeply held beliefs, pull us back and deter vision from creating desired change. The vision of the OICRD: “we are an engaged community
of visionaries building shared knowledge and capacity”. Covey (1995) had this to say about vision:

> Vision is the fundamental force that drives everything else in our lives. It impassions us with a sense of the unique contribution that is ours to make. It empowers us to put first things first, compasses ahead of clocks, and people ahead of schedules and things. (p. 116)

The OICRD functions much like a “chamber of civil society organizations” in that it brings together what Mendel (2010) referred to as public government, private government and government agencies. The reference to sustainability in the OICRD vision may need to be better understood in order for the vision to impassion OICRD work. The sustainability focus has been as divisive as it has been cohesive. Connelly et al. (2013) suggested much of the sustainability movement is caught up in the counterpublic activities of the old guard environment movements. Further to that, the influence of the United Nations and Agenda 21 act to foist ideas and assumptions onto local communities that may not make sense. Action research according to Stringer (2007) and Coghlan and Brannick (2010) is an alternative to this global influence. Action research is intent on having local people affected by an issue find solutions to their issues. Our data and the recent activities of the OICRD, including the Other Side of Occupy and the consideration of Aneilski’s (2007) Genuine Wealth model, suggested that Olds is building the capacity to be masters of its own destiny. The OICRD and civic society in general needs to continue to understand that local context is more important than global philosophies or paradigms held up as the highest value by global players, regardless of their orientation. The reviewed literature suggested that creating arenas for community to come together to sort through the noise and make meaningful decisions on the types of communities the locals want
and the types of investments this requires is an important piece of a holistic community development model.

In Olds, the OICRD can counter the counterpublic tendencies of individualism and virtual communities and allow for a different type of engagement to happen, one based on aggregating up the competing value sets into something that we as a geographical community can make sense of and communicate in an effective way. In Chapter One, we noted that Senge (2006) thought that the ideas and tools used by Learning Organizations could provide lessons for society to transform into Learning Communities. The data suggested that Olds and the OICRD are in a good position to make this transition.

**Finding Four: Learning at the personal, organizational and community level needs to be a focus.**

The relationship between communication and learning in our research is fascinating. The predominant theme in the research is better communication. Drilling down into the data suggested that communication is a metaphor for learning and understanding. People that are vested in the work and potential of the OICRD not only want to know what is happening but also want to know why it is important. There were numerous examples from both the focus group and the survey to support this finding. One survey response stated:

> Have committee members attend a different committee meeting to share information and to report back to their home committee how other committees are helping the Olds Institute meet its mandate. The goal should be to ensure that all Olds Institute members understand and value the contributions all committees and their members make to the Olds Institute.
An example from the focus group connecting communication and learning was noted by a participant: “we are an enlightened society; the community is knowledgeable, aware, educated and has understanding”. The most powerful expressions of the metaphor came in response to the question “do you feel your voice makes a difference in the overall well-being of this community?” A sampling of the responses follow: “yes, I believe the OI is structured properly where everyone’s opinion is taken seriously and if someone puts time and energy to make a difference their voice will be heard”, and another response was:

Would like to think it does. As individuals, we all have different backgrounds, which contribute to how we perceive and focus on the various tasks. It is important as a community we recognize diversity of our members and how that may affect the overall present and future of the community.

A third response to this question provides an example of the relationship between communication and learning. Short (1998) referred to our human tendency to participate in dialogue as an attempt to teach and not to learn. This reference suggests that having a voice was not necessarily an attempt to teach or to influence but rather to add to the richness of the community discourse:

In all honesty, I would knee-jerk with ‘no’. But I believe that this community, via the OICRD, gives everyone a voice; far beyond any other municipality that I have been a part of. The accurate answer would be that I believe my voice has an opportunity to make a difference, and that is all anyone can ask for; meaning that whether or not my perception is of that difference actually being realized or not is too selfish in the spirit of community well-being.

The metaphor of communication as learning is especially important when trying to understand leadership within the OICRD context. The focus group data spoke about participation rates in important OICRD initiatives. A focus group participant suggested, “It is the Board’s responsibility to prepare people to understand opportunities and the volunteers need to help to
recognize opportunities”. It was suggested that people are involved in whatever work they do with the OICRD because of particular passions or relationships; many are content with that role but are not ready to participate as a leader or promote the OICRD more widely unless they understand the wider point of view. In order to understand the gap between individual perceptions of the current reality and what they see as a preferred future, the research asked an Appreciative Inquiry question:

It is April 13, 2013 and you have had a busy day participating in the Sustainable Olds ‘Measuring What Matters’ workshop. You go to bed and have the best sleep ever, when you wake up it is the middle of July 2014. When you reengage with the community and your Olds Institute work you are thrilled to see the type of engagement and activity you always imagined it could be – the way you believe it ought to be. Describe what you see happening. How is it different? Describe what is going on in 2014 that exemplifies the ideal engagement you have always imagined and how the OICRD Board is supporting that engagement?

The response to this question provides a rich sense of what a preferred future for the OICRD looks like. The theme of learning at the individual, organizational and community level was evident in question responses such as, “a team of problem solvers and decision makers who are taking a responsible interest in moving opportunities forward in the best interest of its citizens. They are a very ‘enlightened group’ reaching out to engage others all the time”. A particularly good example of a vision of learning was in this response:

People are finally becoming aware of what sustainability is and are in the beginning stages of embracing it. They recognize that sustainability is more than recycling and they are learning to live within their own boundaries whatever that might mean to them. The community is aware that for sustainability to really take hold money needs to be spent in order that the programs can be implemented effectively.

The literature regarding learning and communication suggested that learning is not a linear process and the iterative cycles cause confusion. Garratt (2011) posited that modern
organizations are complex and so do not behave in ways that might be defined as rational, “in practice irrationality is generated by misunderstanding the complexities and uncertainties of modern organizations” (p. 21). Garratt combined many of the concepts of organizational learning and action research into what he called action learning. Garratt stated, “Structural elements of action learning are that the authority and responsibility for analysis and implementation are given to those people who have psychological ownership of the problem and must live with the proposed solution” (p. 21). This type of ownership sometimes adds to irrational behaviour as innovative and creative solutions are sought. It requires all stakeholders to look at problems and possible solutions from different perspectives in order to make sense of what might be a preferred direction.

**Finding Five: Resources and capacity are always a consideration.**

One of the official goals of the OICRD is to be financially self-sufficient and not rely on financial contributions from the Town of Olds and thus the taxpayers of Olds. Committees of OICRD are comparatively highly cognizant of the role of the volunteer sector. Our research suggests that the volunteers that participate in OICRD work do so because of altruistic reasons. The two survey questions, “do you feel your voice makes a difference in the overall well-being of this community?” and the appreciative inquiry question about what ideal engagement looks like in July of 2014, provide examples of what motivates people to volunteer for the OICRD. A response to the first question was, “I feel I am listened to and heard. I feel my opinions may not change things but my voice in both the lifestyles and SOC committees is all part of the due process”. Another respondent to the same question offered this, “I do. I do not contribute a lot of
ideas, but I feel that when I do, they are considered. I feel this allowing of ideas is what makes our Town progressive and great”. There are many examples from this question that make the link that a little bit of effort by one, when multiplied by many volunteers builds capacity. One other response to this question was:

Yes, because I actively engage in opportunities that this community has to offer, which allows me to put forward my thoughts and insights and utilize organizations like the OI to champion projects and engagement to make Olds a healthier and stronger community.

The link between resources and capacity building is apparent in many responses to the appreciative inquiry question. One response to this question stated, “Committee members and leaders are committing more time to OICRD activities, so that more results are achieved. Many OI committee activities are complementary, supporting the common goal of marketing Olds as THE place to live and do business, especially technology related that leverage the community investment in O-NET”. This idea of more people involved as a way to accomplish more comes up repeatedly in our research. There was little suggestion of a desire to further professionalize the work of the OICRD. Rather, there were a number of responses that suggested a way to balance resources and capacity is to keep it simple as the following survey responses stated, “stream line where possible”, “encourage committees to work together where and when possible”, “reporting from individual committees is essential to reduce duplication and improve relationships”. A response to the last survey question, “what advice would you give to the Olds Institute Board of Directors to improve engagement between the Board and your organization or committee?” was simple and to the point, “keep it simple”.
Simple is not the same as not effective; Connelly, et, al. (2013) of Simon Fraser University argued that **Sustainable Community Development** and the **Social Economy** need to come together as the next phase of Sustainability Planning. Connelly et al. posited that:

> Barriers to implementation are less about our technical capacity – we know enough about viable alternatives and solutions – and more about the mobilization of citizens and their governments to enact structural change. In addition, communities are struggling to deliver on the holistic promise of sustainability. Sustainability suffers from policy inflation of increased expectations to deliver development that is economically, socially, and environmentally sound, yet has failed to acknowledge the increasing capacity gap for implementation. (p. 193)

There are differing opinions in the literature on the wisdom of increasing professionalism in order to create the capacity to implement sustainability strategies. Connelly et al. (2013) argued that the key to building capacity to reach a balanced and holistic sustainability ideal is to mobilize people and to socialize sustainability. The argument is that sustainability planning to this point has been overly represented by environmental considerations. Connelly et al. made a distinction between the global sustainable development movement and the local focus of what they refer to as sustainable community development. “Sustainable Community Development (SCD) provides a ‘systems approach’ that recognizes that local communities are complex systems with multiple inter-relationships at different scales (rural/urban, local/national/global) and among different issue-based sectors” (p. 194).

Connelly et al. (2013) stated that the social economy includes those organizations and associations that use the market to pursue explicit social objectives. The social economy has emerged as a community response to negative impacts of social and economic restructuring. The social economy suffers from the same “mess of nomenclature” as Mendel (2010) attributed to the nonprofit sector; however, it has been loosely defined to include activities by democratically
controlled organizations that integrate a social and economic mission. The OICRD has entered the social economy in a significant way, retaining local capital in order to invest in community initiatives in an attempt to keep profit that would otherwise leave the community to large private organizations.

**Conclusions**

Our research suggested that the timing is right for the OICRD to reinvent itself and re-establish the vital role that the board of directors plays in governance and engagement. The literature review also suggested that it is timely for the OICRD to continue with its pioneering spirit and lead the way toward learning and teaching the nonprofit sector better ways to build community that reflects local interests and counters the global influences that may not make sense, especially in a rural context such as Olds. Our concluding thoughts follow:

1. Engagement toward sustainability requires enhanced communication that supports relationship building and interdependence.
2. Communication serves to enhance learning and understanding.
3. The process of engagement is important and needs to support creativity while honoring the past successes, present hopes and future possibilities.
4. To create meaningful engagement, a third space is critical.

The desire for enhanced communication in the OICRD is inspired by a desire to enhance relationships. Our research suggested that basic technical communication function might not fit with the current complex and fluid nature of nonprofit organizational structure. This is not so much a structural issue but more a systems issue. Bolman and Deal (2008) wrote that in order for
an organization to be healthy the four frames of structure, human resources, politics and symbolism must all be functioning at an acceptable level and that organizational changing requires an understanding of the barriers to change and essential strategies in order to keep each of the four frames functioning. Communication is one important part of a holistic systems perspective of relationship building and of renewal.

**Table 6: Reframing Organizational Change**

<table>
<thead>
<tr>
<th>Frame</th>
<th>Barriers to Change</th>
<th>Essential Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structural</td>
<td>Loss of direction, clarity, and stability; confusion, chaos</td>
<td>Communicating, realigning, and renegotiating formal patterns and policies</td>
</tr>
<tr>
<td>Human Resource</td>
<td>Anxiety, uncertainty; people feel incompetent and needy</td>
<td>Training to develop new skills; participation and involvement</td>
</tr>
<tr>
<td>Political</td>
<td>Disempowerment; conflict between winners and losers</td>
<td>Create arenas where issues can be renegotiated and new coalitions formed</td>
</tr>
<tr>
<td>Symbolic</td>
<td>Loss of meaning and purpose; clinging to the past</td>
<td>Create transition rituals; mourn the past, celebrate the future</td>
</tr>
</tbody>
</table>

Communication serves to enhance learning and understanding. Much was said in our data about the need for better communication but looking at the underlying reasons for better communication we found a desire to understand the OICRD beyond the particular piece that individuals play in the process of sustainable community development. Lewis (2005) stated that the role of communication as a learning process within the nonprofit sector has been neglected and filled with assumptions that have not been rigorously researched. The field of social science study which includes organizational learning, action research and what Garratt (2011) called action learning elevate communication from a function that reports events that have happened in the past to a function which is critical to learning and understanding organizational changing.
In Chapter One, we identified the significance of this inquiry to the OICRD. We suggested that the practice of sustainability planning had reached a plateau and needed new tools in order to breathe new life into the planning and implementation process. We quoted Coghlan and Brannick (2010, p. 72) and their research noting that these new tools and alternatives come about through sustainable learning. In the fast paced, ever changing, complex society that we live in traditional strategic planning with annual goals, strategies and action plans no longer provides the framework for effective community development work. Shifting the governance model to one that favors a generative focus as opposed to a fiduciary or strategic one has the hope to frame issues and opportunities differently and ask different questions to get different and better results.

In Chapter One, we suggested that the process of engagement to discuss sustainability might be as important as the strategies that are ultimately agreed to. The literature on sense-making and local context supports this suggestion. Organizational Action Research as a foundation to combine organizational and community learning and action is a compelling goal. It holds the hope of changing the ways in which we build community capacity from a way of doing things to a way of being. Creating the requisite physical and virtual infrastructure to practice action research in the ways that it is intended to be practiced will help to breakdown what Brown (2012) referred to as the “epistemological infrastructure” that creates those deeply held beliefs which oftentimes prevents progress.

Creating a virtual third space where we can suspend all of our other affiliations and concentrate on what is best for the OICRD and in turn for community development will re-define relationships and open up new possibilities. Creating a physical third space where we can employ new learning tools like Open Space, Court Yard Cafe, Appreciative Inquiry, and similar
tools will allow solutions to bubble up from traditionally unlikely places and allow citizens to participate in initiatives and projects on an ad hoc basis and not commit to traditional committee structure and obligations. It will also provide a venue to do data collection and reporting in unison by employing tools like the interview matrix and dialogue. In addition, it will provide a place to congregate and celebrate our successes, something that our research identified as missing.

Letting go of the mental models of how Boards need to operate, with set agendas and key performance indicators, policies and procedures will be a period of discomfort. Bridges (2003) described this transition as the “neutral zone” and referred to it as stepping off a solid footing and not being sure where you are going to land. Chait et al. (2011) stated that generative work conveys the gift of leadership and helps to see things better, improving perception and perspective so that we are in a better position to invent new goals, to discard old goals, to better see problems and to discard problems that really are not that important in the end.

To many, the thought that we might turn to the ancient Greek idea of the agora for guidance in ordering Sustainable Community Development and the Social Economy relationships in the complex environment of the twenty-first century may feel fanciful and perhaps misguided. For those that think that, we challenge you to consider what is meant from this survey response:

In 2014, I see engagement being a process wherein which individuals of all demographics and creeds join together to discuss the top of mind issues in the community. The engagement that would happen would be positive dialogue wherein all involved would feel a sense of belonging, purpose and achievement for the work that has been done and will be done in the future. I see youth being the champions of engagement and the ambassadors for bringing the community together in a constructive format. Engagement
will mean the evolution of citizen-oriented action to address the key issues in the community, and will lead to beneficial communications with the Town and municipal leadership to act as partners in this change. Olds will lead by example.

A return to a more philosophic tradition may be exactly what is needed to lead community development in this particular time in history. Combining this with the philosophy of the Learning Organization may just lead us to measuring those things that actually matter and lead to a happier place. “Happiness is a by-product of a life well lived, this is what motivates practitioners of organizational learning” (Senge, 2006).
CHAPTER FIVE: INQUIRY IMPLICATIONS

Recommendations for the Organization

The OICRD has a history of engagement and a reputation as a model for community economic development. Its role as a pilot community in the AUMA ICSP sustainability planning process positioned the OICRD as a leader in sustainability planning as part of community development. This leadership position is recognized both provincially and nationally with Olds being awarded the Alberta Urban Municipalities Association/Alberta Environment Founder Community Award in 2008, and the Federation of Canadian Municipalities Sustainable Communities Award in 2011. In Olds, the sustainability journey continues. The recommendations in this section are a reflection of the responses to the research questions developed for this inquiry. The recommendations are structured in a way meant to build successively from one to four, keeping in mind that in the OAR model changing is an ongoing process and these recommendations are meant to prepare the OICRD for changing.

Recommendation One: Relationships

It is apparent that the essential members of the OICRD need to rediscover what brought them together in the first place over 10 years ago. Our research suggested that, the perception is the collaboration between the four organizations is not as strong as it was in the early years of the OICRD. Much has changed since that first cup of coffee, and all four organizations have matured and grown; all four are successful in their own right. In order for the OICRD to benefit from the successes of the individual members, they must re-establish their interdependence. The literature says that interdependence fosters a desire to participate and a commitment to meaningful
collaboration, and it is possible to build trust in situations of high interdependence. By contrast, where interdependence is weaker, it will be difficult to effectively build trust. Our research suggested that stakeholders come to recognize their interdependence through the collaborative process (Ansell & Gash, 2008).

In order to maximize the effort to discover and recreate interdependence, new sustainable processes and practices must be developed. Communication was the theme that kept surfacing in the data collection and analysis for this project. There were references to all manner of communication types including online and virtual communities but from a governance perspective, the quote below reflects what the data suggested:

All collaborative governance builds on face to face dialogue between stakeholders. As a consensus-oriented process, the ‘thick communication’ allowed by direct dialogue is necessary for stakeholders to identify opportunities for mutual gain. However, face to face dialogue is more than merely the medium of negotiation. It is at the core of the process of breaking down stereotypes and other barriers to communication that prevent exploration of mutual gains in the first place. It is at the heart of a process of building trust, mutual respect, shared understanding, and commitment to the process (Ansell & Gash, 2008, p. 558)

The institutionalization of a collective decision-making process is central to the definition of collaborative governance. The OICRD should consider if a separation between governance and administration is reasonable and what role the respective administrations of the four essential members should be. As an alternative to further professionalizing the OICRD and building a fully autonomous governance and administrative structure, the ability of the existing members to provide professional support in building community capacity should be researched. This should be viewed not only as capacity building but also as an exercise in relationship building.
Recommendation Two: Possibilities

There is no end to the possibilities that community development work can support. This is evident in the many projects happening in Olds under the auspices of the OICRD and community economic development. The research for this project showed that there is a fundamental piece missing from the governance puzzle. The relationship between the board and the essential members is misunderstood. All board governance needs to understand the idea of “ownership”. There is not a good understanding of who “owns” the OICRD. There was a difference in the data between the focus group and the survey regarding ownership. The focus group suggested that by virtue of the mandate given to the OICRD by Town Council, Council owned the OICRD. The prevailing assumption in the survey was that the “community” owns the organization. This divide regarding ownership was further confused by the established roles and responsibilities in the OSSP (Appendix A) which puts Council as the Plan owners. There needs to be clarity regarding the diagram and if the roles and responsibilities apply to sustainability planning only or to the OICRD in general. Because of this ambiguity, the Town looks to the OICRD to engage and feed back the wishes of the community and at the same time, the OICRD is looking to the Town for ownership wishes that they can translate into performance. The question of ownership needs to be better understood in order to provide adequate direction for the OICRD Board to work. An example of this needed relationship is provided in figure three. Only after the question of ownership and an understanding of owners’ wishes are developed can the board do their part in governance.
Governance exists in order to translate the wishes of an organization’s owners into organizational performance (Carver, 2006).

**Figure 3: Organization Ownership Model**

Recommendation two is that after relationships are re-established, or perhaps as part of relationship building, the essential members, including their respective governing bodies and senior staff, come together to identify possible initiatives that have mutual gain and to which all four can contribute and benefit from. The vision of the OICRD needs to be examined and the fundamental question regarding the type of capacity the OICRD wishes to build in order for the community to support the four members and the four members to support the community needs to be understood. The results of this work can then become the framework from which action planning can take place. The end result is that the OICRD needs more ambassadors to communicate its value and needs to enlist volunteers and community members to support initiatives such as Mountain View Power and O-NET as the funding mechanism to further social, cultural, environmental, economic and governance programs.

In Chapter One, we quoted Senge (2006) who suggested that in organizational learning dialogues diverge in order to consider a multitude of possibilities. The global governance model developed by the Institute for Nonprofit Studies conveys a similar diverging picture. Conversely,
our exposure to The Natural Step introduced us to the metaphor of a funnel to converge ideas in order to prioritize the many possibilities and move to action.

Figure 4: Divergence and Convergence. Copyright 2009 Lynn Walsh.

Kaner and Lind (2007) defined the space between divergence and convergence as the “groan zone”. This space between divergence and convergence is the zone where possibilities materialize. We must learn how to navigate the groan zone in order to move to positive action.
Recommendation Three: Action

In this fast-paced environment of organizational life, we have developed a propensity to move to action before the requisite groundwork of relationships and possibilities have been developed. In the case of the OICRD, action is taking place at the committee level but the connection to that action to greater community development goals within the OICRD context is lacking. This is due in part to the ownership issue cited above but in the case of the OICRD there are many involved that just want to “do”. Governance work and process discussions are not where everyone wants to spend their precious energy and time. Pink (2010) talked about what he called “Purpose Built Organizations”. He demonstrated the incredible innovation that occurs when people are free to experiment on their own terms. Action Research provides a framework for this type of innovation, passion and experimentation to evolve.

Action research is research in action, not research about action (Stringer, 2007; Coghlan & Brannick, 2010). Action research when understood can provide the type of environment that lends itself to generative governance and provide the ability to move to action in a different way than traditional strategic planning. Garratt (2011) married action research and the tools of the learning organization into what he referred to as action learning. Action learning puts people at the centre of relationships because as Garratt stated, “the only resource capable of learning within an organization is the people who comprise it. The very diversity of the experience of the people in the organization is a valuable asset, if one can learn to use it” (p. 24). Action learning and the tools of the Learning Organization have the potential to vastly reduce the time required to research, move to action and report on community development initiatives. Action learning is
about discovery and aggregating the diverse learning of organizational members in order to stay agile and current, “as learning is at the core of this process it is particularly valuable in developing the structures and dynamics of organizational change” (p. 24).

**Recommendation Four: Reporting**

Within the generative governance literature there is consensus that leaders should stimulate creativity by “synthesiz[ing] the knowledge of diverse participants so the group can create new ideas and understanding” (Ansell & Gash, 2008, p. 555). As much as this makes sense at an intuitive level, community development literature suggests that one of the major challenges with synthesizing knowledge is getting data and information into a format that can be used in decision-making. The amount of information we are exposed to and the polarity of many community development issues makes it difficult to find common ground and move to action.

Wentzel recently commented on the blurring of public and private sector boundaries:

> In the case of public service, mobilization of the public, through civic engagement, provides the opportunity to make everyone, on the basis of shared community values, rather than on reimbursement, a potential collector of data. The professional, and public service, becomes much more strategic in perspective understanding, through the aggregate of the values, what the defining quality of life indicators are, and the specific targets of performance and then uses Open government in a variety of data collection strategies, to generate big data, which is then quickly brought into data analytics, which drives action to be taken and results to be achieved. (C. Wentzel, personal communication, January 23, 2013)

Reporting, like communications, is changing in this world of new governance. Reporting is no longer commenting on key performance indicators and targets but is an essential part of analytics and does not signal the end of a project or initiative but rather is a part of ongoing changing and improvement.
New governance of this type requires not only new tools but also new spaces that lend themselves to dialogue and reflection. The OICRD needs to create a physical third space (agora) that is known as a place for this type of work. The new agora should support an environment where personal and organizational ontology, epistemology and experience are suspended in order to allow for the creation of new ideas and possibilities. Booher (2004) suggested it must also break down the pluralistic challenge that suggests, “The public is neither informed enough nor inclined to be actively involved in the formation of public policy. Instead, public policy is created through the exercise of power on the part of legitimate governmental institutions” (p. 41). This pluralistic challenge exists in community development as well as in politics. If we accept this definition of pluralism then the need for the OICRD is diminished and the elected Council is left to develop policy without the engagement that they desire.

New engagement techniques and tools allow for data collection, analysis and reporting to happen rapidly in the same sitting. It is no longer necessary to hold on to the mental model that these processes are separate parts of research and need to involve separate action. As important issues arise, they can be identified and then dealt with on an ad-hoc basis as opposed to the current OICRD model of passing the issue on to a committee to be further evaluated and assimilated into that particular committee process. Instead it can be handed off at the time it is discovered, to a committed group to solve it.

Chait, et al. (2011) asked the question, what if one of the central problems plaguing the board is not, in fact, uncertainty about its important roles and responsibilities, but rather a lack of compelling purpose in the first place. The OICRD must always understand that its joint work is an attempt to build community capacity and not necessarily to conform to external structures,
including reporting structures that take away from their purpose in favor of reporting on things that might not really matter. Reporting in a generative governance and action-learning context is an important component of organizational changing. It is a part of a communication function that enables continuous changing as opposed to limiting communication to reporting on things that have already happened. Reporting within the OAR iterative model is a way to enhance learning and leadership, strengthen relationships and move toward a vision less restricted by established beliefs.

**Research Limitations**

The study of community development does not fit into any one particular discipline of inquiry. Qualitative research by its nature is at odds with the scientific method that attempts to replicate findings so that they can be applied in different situations. Organizational action research as a methodology is concerned with finding solutions to everyday problems within a specific context and not in a generalized way. OAR as a praxis develops a knowledge set that is valuable to the specific organization but does not lend itself easily to the mental model of knowledge building that adds to organizational theory. As a result “a typical concern is how and under what conditions system transformation will occur” (Flood, 2010, p. 272). Our research suggests that it might in fact be that the definition of organizational success needs to transform as opposed to transforming organizational performance to meet external models. There needs to be more research to explore this notion of performance in order to develop OAR as a liberating praxis. This is especially important if we are to meet the requirements of authenticity that OAR relies on as a proxy to scientific replication.
Our research findings and recommendations suggest a coming together of action research and the tools and theory of organizational learning. In order for this marriage to work, learning has to be given a chance to unfold in a creative way before being forced into existing structural frameworks that science has developed. More research is needed to determine if this method of organizational changing will produce different or better results than existing organizational governance practices.

Our inquiry discovered a significant amount of research on action research as it relates to human systems. There was little research regarding the possibility of professional support for nonprofits from member organizations or stakeholders being an alternative to building a professional staff within the nonprofit. The exposure to systems thinking that the OICRD has experienced, primarily through its relationship to The Natural Step, is traditional applied systems thinking that concentrates on the structure of functional units. Flood (2010) suggested, that to “appreciate ‘human systems’ in action research ... requires learning and understanding about emergent systems of meaning and moral dilemmas that emerge when they interplay through human interaction” (p. 276). We suggested in our recommendations that an alternative to further professionalizing the OICRD staff might be that the four essential members provide professional assistance. The lack of research on human systems and the dilemmas it brings may render this recommendation untenable or not workable without common agreement of the value of learning and perhaps changing ingrained views of organizational and partnership success and established structural arrangements. This may not be accepted as the job of essential member professional staff. Economic, political, or symbolic structures that are responsible for the perpetuation of
current arrangements need to be recognized and then transformed in advance of, or at least in conjunction with, changing people’s views of success within the OICRD context.

Complexity theory in addition to, or as an extension of, systems thinking explains that the vastness of interrelationships and emergence in which people are immersed is beyond our ability to fully comprehend (Flood, 2010). The ability to communicate this inability to comprehend is at the heart of our research findings which suggests that communication is the number one issue with the OICRD. There is a need for better research on how to espouse the ideas of complexity into a format that adds to solving systemic problems of communications within organizations and communities. Our recommendation of a return to the philosophic tradition with a virtual and physical agora as a place to make sense of this complexity is a start but may not work for all segments and demographics in our modern society. Furthermore, as Flood (2010) stated:

Any approach that arguably is embedded in interpretive thinking as its intellectual framework of ideas is in the firing line of criticisms aimed at relativism. That is, if meaning is purely a matter of interpretation, then every viewpoint must be considered equally valid. In that case, exploring world-views to generate mutual understanding can and perhaps should go on forever. The troubling question that this observation leads to is how then can we move from debate to a pragmatic action research? (p. 279) Flood provided an answer to this question, “action research carried out with a systemic perspective in mind promises to construct meaning that resonates strongly with our experiences within a profoundly systemic world” (p. 282).

The OICRD has naturally migrated to this place of exploring different worldviews in an attempt to understand our place in the world and to make sense of it. Our exposure to systems thinking and the use of vision to move us from our current reality has been both rewarding and frustrating. Perhaps this is where we need to be at this particular time in the journey of the OICRD, a heuristic learning orientation that encourages experimenting, evaluating possibilities and trial
and error. It would be beneficial to have better research to suggest that this orientation is reasonable.

There are two fledgling bodies of literature that should be further investigated in conjunction with our research. Big Data, according to IBM is more than simply a matter of size; it is an opportunity to find insights in new and emerging types of data and content, to make your business more agile, and to answer questions that were previously considered beyond your reach (Zikopoulos, Eaton, deRoos, Deutsch & Lapis, 2012). More importantly to our research is a trend that suggested that analysis of big data should be a social event (Bayer & Taillard, 2013). Our research agreed with this, but suggested that data collection, analysis, and reporting when supported by the proper tools and processes can all be social functions. The second body of literature that supports our research, but is still being developed, is the discipline of disruptive thinking. Williams (2011) stated that disruptive thinking is, “designed to be quick, informal, intuitive and qualitative” (p. 9). Disruptive thinking is not about incrementally building on past successes; it is meant to be provocative instead of predictive and break prevailing patterns and mental models as opposed to problem solving in the traditional way. Big data and disruptive thinking have proven to be beneficial to improving business performance. Understanding how to incorporate big data, disruptive thinking and action learning into nonprofit governance models has the potential to revolutionize community development work.

The OICRD is far from being broken. The spirit and support for this research and an authentic desire to continue to improve governance and engagement at all levels of the organization was evident throughout this project. We hope that the OICRD finds value in our
work and look forward to playing a role in implementing the changing that the OICRD is clearly ready for.
CHAPTER 6: META-REFLECTIONS ON INQUIRY

Action research is research that brings action research cycles to a problem or issue. Coghlan and Brannick (2010) cited Zuber-Skerritt and Perry as differentiating two cycles that together define the action research cycle. The core cycle consists of constructing, planning action, taking action and evaluating action. The thesis cycle is a reflective cycle that is an action research cycle about the action research cycle. The thesis cycle is learning about learning or what Coghlan and Brannick referred to as meta-learning.

This project and my introduction to action research has been a cathartic experience for me. Much of what I wrote about in this paper is in line with my personal passion and conviction that we need to find ways to reinvent the democratic process in order to continue to fully benefit from democracy. As a senior bureaucrat in local government, I see the unique opportunities for new leadership to transform the way we build community capacity and meaningful places for us to live, work, learn and play. This inquiry has provided me the opportunity to reflect and write down the collective experiences that I have gained over the last ten or so years as a professional municipal administrator and compare my experience to literature.

Over the course of the two years of this program and the last year developing this inquiry, I have had the opportunity to study and reflect on the topic of leadership within my profession and the broader field of politics and community development. I have come to develop and use two definitions of leadership: “Leadership=Learning+Action”, and, “Leadership is the ability to motivate someone (including yourself) to do something that they would not otherwise do”. This
link between leadership and action has made a difference in my life and has allowed me to be more focused and deliberate in my work, family and leisure life.

Early in this adventure, I was exposed to the work of Ronald Short (1998) and the sometimes-painful experience of examining things from the inside out. The work of Short and the understanding of systems that Senge (2006) and others that this journey has provided has brought me to my current understanding that leadership for the sake of leadership is useless; there needs to be a cause or a reason in order for leadership to be necessary. I have referred to myself as a “paranoid leader”, afraid that someone is following. I have used this term tongue in cheek; this course has brought real meaning to this phrase. I am a paranoid leader because I do not have a firm grasp of what is expected of me as a leader. I am a leader by virtue of my position as CAO in my organization. The diagram in Figure Five following outlines the leadership competencies and the systems relationships of self, others, systems, communities and the world. All of my relationships start with me. I am just beginning to understand the incredible opportunity I have to fulfill my leadership potential and serve humanity in my own unique way.

As I progressed through this inquiry, I was compelled to share some of my learning with those close enough to me that I knew would provide appropriate feedback and proper encouragement. One of the most powerful things that I came across in this journey is a TEDtalk by Brené Brown (2010) called “The Power of Vulnerability”. I am blessed to work in an organization where others and I are encouraged to experiment and improve our processes and outcomes. Oftentimes when considering things that are a stretch for my introverted tendencies, encouragement would come and allow me to embrace the vulnerability and lead wholeheartedly.
My organization and fellow employees have also supported the type of leadership that embraces authenticity and is not concerned with style. In conjunction with our Leadership team we have started on a monthly leadership brown bag lunch series that starts with the personal development understanding from Short (1998) that all relationships start with you at the centre. From there we moved to the systems thinking teaching that all systems break down to the fundamental pieces of patterns and relationships. If you want to change a systemic relationship, change the pattern of behavior that led to undesirable results. The pattern of blaming external forces for our relationships and lot in life is a difficult thing to let go of for many, including myself, and is prone to resurface if the new perspective is not nurtured. I see the difference this type of
leadership plays in the various teams that I participate in and the interactions that are beginning to occur with citizens that we provide services to and interact with. Starting with leading ourselves and moving to leading in our teams will surely lead to carrying this type of leadership to community groups that we participate in and in turn increase leadership in our community that starts with individuals but ends in moving towards a community vision that is the aggregate of many.

Kouzes and Posner (2002) compared leadership to art and stated that every artist must find their voice and that finding a voice is not a matter of technique but rather a matter of time and searching. They go on to say that, “what applies to the art of painting applies just as well to the art of leadership” (p. 58). Finding my leadership voice has been my search for many years, the art of leadership has become my life’s work. It is time for me to create my art.

Much of the literature suggested that leadership is about relationships yet we try to superimpose a management or scientific framework on top of leadership that requires measuring, comparing and replicating successes of others that might not make sense in our context. This connection of leadership and management affects creativity; “the prevailing system of management is dedicated to mediocrity” (Senge, 2006, p. xviii). The literature is in need of better models that separate leadership from managerial tendencies that favor homeostasis over creativity and learning. Block (1999) stated we need to build the capacity to solve our own organizational problems and not rely on others to do it for us. This work has reinforced the intuition that nonprofit community development work has moved beyond the policy governance framework and models borrowed from for profit business. The need for different and better engagement models requires new thinking to harness the energy of a community and transform it
into meaningful outcomes that satisfy the sometimes seemingly competing goals of sustainable development.

There are two fundamental sources of energy that can motivate organizations: fear and aspiration (Senge, 2006, p. 209). Structural tension acts as a counter balance to vision and prevents an organization and its people from living up to our aspirations, and instead forces us to live down to our fears (Short, 1998, p. 12). We need to offer better alternatives to counterpublic sentiment and create local community that listens to the many divergent voices and allow those that are affected by systemic community development issues to be part of the solutions and provide meaningful ways for them to participate.

Stringer (2007) stated one of the biggest challenges for building a community vision is to get beyond the mental models of various stakeholders. Cultural systems are maintained through social networks and changing these social networks will threaten those that benefit from the status quo. Action research, “is based on two principles: there can be no learning without action and no ... action without learning” (Coghlan & Brannick, 2010, p. 45). Stringer (2007) suggested that it is not learning in the traditional scientific method way but that action research becomes a social process, “human purposes are at least as important as the technical considerations of research” (p. 42). Coghlan and Brannick took this a step further suggesting, “Action research approaches are radical to the extent that they advocate replacement of existing forms of social organization” (p. 6). Stringer went on to define constructions as created realities. Inquiry does not aim to establish the truth, but rather to reveal different truths and realities, as truth is personal according to our own experiences. Joint constructions can then be developed that make sense of
individual truths to the group as a whole, divergent thoughts coming together to form consensus much like the Kaner and Lind (2007) “groan zone”.

We need to work on today’s most pressing problem. Our preference to develop five, ten, 50 or even 100 year plans is as fanciful as looking back to a philosophic tradition, “although strategic planning is billed as a way of becoming more future oriented, most managers, when pressed, will admit that their strategic plans reveal more about today’s problems than tomorrow’s opportunities” (Senge, 2006, p. 196).

The focus group in our research identified a peculiar characteristic of the OICRD; the three past chairs are still highly involved in committee work and in fact created or re-created committees where they could work on their passions. In that tradition, last December in anticipation of implementation the OICRD created a governance committee that Rob Smith will move to after his tenure as chair. I and another long time volunteer on this committee will join Rob. Considering the literature on generative governance, it is somewhat counterintuitive, creating another committee, but the intention is to move the organization. Our concepts for this governance work are based on the ideas of Block (1999), motive is individual and almost always is different from organization’s purpose, but accomplishment of an organizations purpose can become itself a source of personal satisfaction and a motivation for individuals.

Systems thinking may bridge the divide between the limitations of the scientific method and the art of leadership; “people who succeed in handling complexity are working in an intuitive domain we don't even consider in our educational theories. Only through the integration of that intuitive domain with the normal, rational awareness domain will we transcend mere modeling” (Senge, 2011).
Both Coghlan and Brannick (2010) and Stringer (2007) used the metaphor of a picture. Coghlan and Brannick suggested that only what is intended to be in the frame is under study, while Stringer suggested that because of our mental models we only see certain things in the picture. The picture metaphor is like defining a system; no system is ever complete but we need to create boundaries in order to analyse the system.

Action learning (Garratt, 2011) extends our capacity to create in a generative way, the art of creative learning. More research is needed to evaluate how best to create the environment for action learning to flourish. Can the third space be a place where joint ventures like the OICRD can thrive? Perhaps more importantly, can action learning work at the community and societal level. It can if the right environment is in place:

In the middle of these complex crosscurrents ... innovators somehow find space to lead change. Although they come from very different organizational circumstances, they draw their inspiration from a common idea that there must be a more human, more productive, and ultimately more creative way for people to work together. And though they still represent a small minority of managers and organizations, they demonstrate that a growing cadre of sophisticated leaders are beginning to transform the prevailing system of management around the world. How could the journey of changing deeply held assumptions and practices unfold in any other way? (Senge, 2006, p. 257)
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APPENDIX A: ROLES AND RESPONSIBILITIES

ROLES AND RESPONSIBILITIES OF SUSTAINABILITY STAKEHOLDERS

- Council
  Plan Owners
- OICRD
  Plan Stewards
- OAGSL
  Plan Initiators & Sustainability Coaches
- Community
  Individual Actors of Sustainable Living
- Town Administration
- Community Groups
- OICRD Pillar Committees
- Institutions
  Group Actors of Sustainable Living
APPENDIX B: VISION OF GOVERNANCE

Our Governance Vision

We are a participative community. There is no “they” and “us.” We are involved in our local government and we attend non-traditional community events with solutions. Our Community informs the Town and Council and the Town and Council informs the community using a variety of media. Council members are approachable and receptive to a participative relationship. We are growing together not apart. Citizens are leaders in the community because there is initiative that is encouraged by our Town and Government mentors. We are working together to build sustainable cooperative governance where everyone can and does lead. The OICRD and the OAGSL act as a conduit between the town and the community.
APPENDIX C: ORGANIZATIONAL ACTION RESEARCH DIAGRAM

RRU School of Leadership Studies
Organizational Action Research (OAR)

Organizational Readiness Cycle

1. Context & Purpose
   Student finds and collaboratively develops topic and change goals with Sponsor.
   ( Develops project and seeks & obtains REB approval with Supervisor and Sponsor.

2. Look
   Organizational collaboration in Action Research planning and formal data gathering.

3. Think
   Data analysis & reflection on findings & creating Draft Recommendation.

4. Act
   Engaging Sponsor/Key Stakeholders in understanding. Findings & Finalizing Recommendations (not formal data-gathering) and writing report.

5. Re-contextualize & Reconstruct
   Post-project re-contextualizing findings / recommendations.

Change Intervention Cycle

6. Sponsor Plans Action

7. Take Action

8. Evaluate Action

9. Re-contextualize & Reconstruct

10. Plan Action

11. Take Action

12. Evaluate Action

Transition Zone

RRU OLP / Thesis

Sponsoring Organization

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APPENDIX D: FOCUS GROUP QUESTIONS

In this inquiry the overarching question and sub-questions have been identified through a process of both academic consultation and through careful deliberation with Rob Smith who is the sponsor for this research project. Rob Smith and Norm McInnis have also met with Curtis Cook, Executive Director of the OICRD, to confirm these questions:

How can shifting the governance model in the Olds Institute for Community and Regional Development improve community engagement with sustainability planning and implementation?
What are the current effective engagement practices?
What are the challenges currently causing difficulties with engagement?
What factors would facilitate continued planning implementation and renewal?

For the first exercise I am going to ask you to find a partner and in pairs I want you to have a dialogue regarding the positive exceptions, successes and most vital or alive moments you have experienced in your work with the Olds Institute. You can use these questions to guide your conversation:

- In your time associated with the OICRD Board, describe a time you felt the Board was operating at a high level. What were the circumstances during that time?

- In your time associated with the OICRD Board, describe a time when you were proud to be a Board member of the Olds Institute. Why were you proud?

- In your time associated with the OICRD Board what did you value most about being a member of the Board? Why?

When we come back together to the whole group I am going to ask you to tell the group the most powerful story you heard from your partner (only one story). From these stories we will capture common themes on the flip chart.

For the second exercise I am going to ask you to quietly consider this question:

It is December 25, 2012 and you have had a busy day entertaining family and friends. You go to bed and have the best sleep ever, when you wake up it is the middle of July 2014. When you reengage with the community and your Olds Institute work you are thrilled to see the type of engagement and activity you always imagined it could be – the way you believe it ought to be.
Describe what you see happening. How is it different? Describe what is going on in 2014 that exemplifies the ideal engagement you have always imagined and how the OICRD Board is supporting that engagement?

From this group dialogue we will again capture themes on flip chart paper. From these themes develop what the Appreciative Inquiry literature calls a Provocative Proposition; a statement of what the preferred future related to governance and engagement of the OICRD Board.

The third and final exercise for the day will be to develop a set of questions for a survey that will be offered to the Board/Council members of the OICRD essential members as well as the committee chairs and committee members of the OICRD. The questions will be related to what the essential and committee members require from the Board in order to maximize the effectiveness of the OICRD. The formula should follow this outline:

- Construct one question for each issue or piece of information
- State the question in clear and unambiguous terms
- State the question in positive rather than negative terms
- Do not include jargon or technical terms that may be unfamiliar to respondents
- Keep question short and to the point

As a group we will agree to the set of questions to be included in the survey. If for any reason the questions need to be amended, changes will be communicated to this group before the survey is initiated.
APPENDIX E: SURVEY QUESTIONS

1. Please indicate which category best fits your relationship with the Olds Institute for Community and Regional Development?
   • Board or Council member of an essential member (Olds Agricultural Society, Olds & District Chamber of Commerce, Olds College, Town of Olds)
   • Committee Chair
   • Committee member
2. How many years have you been associated with the Olds Institute?
   • Less than one year
   • One to two years
   • Two to five years
   • Five to ten years
   • More than ten years
3. How connected do you feel to the Olds Strategic Sustainability Plan (OSSP)?
   • Very connected
   • Connected
   • Not connected
   • Very disconnected
   • Don’t know
4. Are you familiar with what is happening with all/other committees of the Olds Institute?
5. What else can be done to maximize effectiveness across the Olds Institute committees?
6. How strong do you feel the engagement and collaboration is between the four essential members of the Olds Institute?
   • Very strong
   • Strong
   • Not very strong
7. What can be done to improve engagement and collaboration between the essential members of the Olds Institute?
8. Do you feel your voice makes a difference in the overall well-being of this community?
9. It is April 13, 2013 and you have had a busy day participating in the Sustainable Olds "Measuring What Matters" workshop. You go to bed and have the best sleep ever, when you wake up it is the middle of July 2014. When you reengage with the community and your Olds Institute work you are thrilled to see the type of engagement and activity you always imagined it could be – the way you believe it ought to be. Describe what you see happening. How is it different? Describe what is going on in 2014 that exemplifies the ideal engagement you have always imagined and how the OI Board is supporting that engagement?

10. What advice would you give the OICRD Board of Directors to improve engagement between the Board and your organization or committee?
APPENDIX F: FOCUS GROUP CONSENT FORM

RESEARCH CONSENT FORM

My name is Norman McInnis, and this research project is part of the requirement for a Master of Arts in Leadership at Royal Roads University. My credentials with Royal Roads University can be established by telephoning Dr. Niels Agger-Gupta, Program Head, MA-Leadership, School of Leadership Studies, at (XXX) XXX-XXXX, x/XXXX.

This document constitutes an agreement to participate in my research project, the objective of which will refer to the governance model that the Board of Directors of the Olds Institute should use in order to best engage Essential Members, Committee Chairs, and Committee Members.

The research will consist of a focus group and is foreseen to last approximately 1.5 hours. The foreseen questions will refer to discovering the reasons for the success of the Olds Institute and developing a set of questions to use to survey the governing bodies of the four essential members, committee chairs and committee members. In addition to submitting my final report to Royal Roads University in partial fulfillment for a MA Leadership, I will also be sharing my research findings with Olds Institute. A copy of the final report will be published and archived in the RRU Library and through the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

Information will be recorded in hand-written format and videotaped and, where appropriate, summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. The data collected will be destroyed upon completion of my research and will be safely stored until completion of the project. Data/information pertaining to an individual that withdraws at any time will be destroyed upon confirmation of withdrawal.

The ultimate goal of the focus group is to develop a set of questions for the survey mentioned above. The final questions will be checked with the focus group members before the focus group is concluded. If there are any required changes to the questions for any reason, those changes will be communicated to the focus group members before the survey is administered.

You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw at any time without prejudice. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

By signing this letter, you give free and informed consent to participate in this project.

Name: (Please Print): _____________________________
Signed: ___________________________________________
Date: _______________________________
APPENDIX G: SURVEY CONSENT FORM

SURVEY PREAMBLE

My name is Norman McInnis, and this research project, Community 2.0, is part of the requirement for a Master of Arts in Leadership program at Royal Roads University. My credentials with Royal Roads University can be established by telephoning Dr. Niels Agger-Gupta, Program Head, MA-Leadership, School of Leadership Studies, at (XXX) XXX-XXXX, x/XXXX.

The research will consist of this survey and is foreseen to take 15 minutes to complete. The foreseen questions will refer to the governance model for the Board of Directors of the Olds Institute to use in order to best engage Essential Members, Committee Chairs, and Committee Members. In addition to submitting my final report to Royal Roads University in partial fulfillment for a MA Leadership, I will also be sharing my research findings with The Olds Institute for Community and Regional Development. A copy of the final report will be published and archived in the RRU Library and through the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

The information you provide will be summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless your specific agreement has been obtained beforehand. All documentation will be kept strictly confidential.

The data collected will be destroyed upon completion of my research and will be safely stored until completion of the project. Data/information pertaining to an individual that withdraws at any time will be destroyed upon confirmation of withdrawal.

I plan on using Survey Monkey to conduct this on-line survey, accordingly in the event that your survey response is processed and stored in the United States; you are advised that its governments, courts, or law enforcement and regulatory agencies may be able to obtain disclosure of the data through the laws of the United States.

You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw at any time without prejudice. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

Your completion of this survey will constitute your informed consent.
APPENDIX H: FOCUS GROUP INVITATION

LETTER OF INVITATION

[Date here]

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for a Master’s Degree in Leadership, at Royal Roads University. My name is Norman McInnis and my credentials with Royal Roads University can be established by calling Dr. Niels Agger-Gupta, Program Head, MA-Leadership, School of Leadership Studies, at (XXX) XXX-XXXX, x/XXXX.

The objective of my research project is to examine governance options for the Olds Institute for Community and Regional Development. In addition to submitting my final report to Royal Roads University in partial fulfillment for a MA Leadership, I will also be sharing my research findings with The Olds Institute.

My research project will consist of a focus group and is foreseen to last 1.5 hours. The foreseen questions will refer to discovering the reasons for the success of the Olds Institute and developing a set of questions to use to survey the governing bodies of the four essential members, committee chairs and committee members.

Your name was chosen as a prospective participant because of your position as either a past Chair of the Board or a current member of the Olds Institute Executive Committee. The result of the focus group work will be a set of questions to be used to survey the governing bodies of the four essential members, committee chairs and committee members.

Information will be recorded in hand-written format and videotaped format and, where appropriate summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless your specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. The data collected will be destroyed upon completion of my research and will be safely stored until completion of the project. Data/information pertaining to an individual that withdraws at any time will be destroyed upon confirmation of withdrawal.

A copy of the final report will be published and archived in the RRU Library and through the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes. The ultimate goal of the focus group is to develop a set of questions for
the survey mentioned above. The final questions will be checked with the focus group members before the focus group is concluded. If there are any required changes to the questions for any reason, those changes will be communicated to the focus group members before the survey is administered.

You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw at any time without prejudice. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

If you would like to participate in my research project, please contact me at:
Name: Norman McInnis
Email: XXXXXX@XXXXXX.XX
Telephone: XXX-XXX-XXXX

Sincerely,
Norm McInnis
APPENDIX I: SURVEY INVITATION

LETTER OF INVITATION

[Date here]

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for a Master’s Degree in Leadership, at Royal Roads University. My name is Norman McInnis and my credentials with Royal Roads University can be established by calling Dr. Niels Agger-Gupta, Program Head, MA-Leadership, School of Leadership Studies, at (XXX) XXX-XXXX, x/XXXX.

The objective of my research project is to examine governance options for the Olds Institute for Community and Regional Development. In addition to submitting my final report to Royal Roads University in partial fulfillment for a MA Leadership, I will also be sharing my research findings with The Olds Institute.

My research project will consist of an online survey and is foreseen to last approximately 15 minutes. The foreseen questions will refer to discovering conclusions and recommendations to the Olds Institute Board to improve engagement and governance processes with its essential members and committee members.

Your name was chosen as a prospective participant because of your position as either a member of the Board/Council of one of the Olds Institute essential members (Olds Agricultural Society, Olds and District Chamber of Commerce, Olds College, Town of Olds). The result of the survey will be a set conclusions and recommendations to the Olds Institute Board to maximize effectiveness in engaging stakeholders and governing the organization.

I plan on using Survey Monkey to conduct this on-line survey, accordingly in the event that your survey response is processed and stored in the United States; you are advised that its governments, courts, or law enforcement and regulatory agencies may be able to obtain disclosure of the data through the laws of the United States. Where appropriate information will be summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless your specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. The data collected will be destroyed upon completion of my research and will be safely stored until completion of the project. Data/information pertaining to an individual that withdraws at any time will be destroyed upon confirmation of withdrawal.
A copy of the final report will be published and archived in the RRU Library and through the Thesis Canada Portal of Library and Archives Canada, and ProQuest/UMI.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes. You are not compelled to participate in this research project. If you do choose to participate, you are free to withdraw at any time without prejudice. Similarly, if you choose not to participate in this research project, this information will also be maintained in confidence.

If you would like to participate in my research project, please contact me at:
Name: Norman McInnis
Email: XXXXXX@XXXXXX.XX
Telephone: XXX-XXX-XXXX

Sincerely,
Norm McInnis
The Community of Olds Sustainability Principles

1. People and nature will not be subject to conditions that systematically undermine the ability and/or capacity to protect and nurture the earth’s crust and to meet basic human needs.

2. People want to choose right and responsible actions. Leadership will enable them to perform positive actions individually and collectively to move initiatives forward. We will lead by example.

3. In order to be fair to all citizens and to the community as a whole, our decision making process, led by the citizens in our community, must be inclusive and consider all points of view. We will build on-going communication between the citizens and the leaders of our community.

4. In a democratic society it is both a right and a responsibility for citizens to participate in the decision making process. There is a continuum of activities through which citizens can engage and participate.

5. Our community will have the knowledge to adapt to ever-changing external demands.

6. In a participative community all citizens and organizations must strive to manage their expectations. Ultimately, all citizens should be able to live in a state of cautious optimism.

7. The Olds Strategic Sustainability Plan is practical. Our community can easily understand how it works and incorporate the plan into everyday activities.

8. The processes and the results of the Olds Strategic Sustainability Plan inspire the confidence of the members of this community and we must measure, track, and report to the community in support of continuous improvement.

9. The voters in this community can identify decision-makers and hold them to account.

10. Our evaluation of the engagement process ensures success providing all of the following criteria is met:
    a. Learning: Citizens will become knowledgeable in a short period of time even if they have little or no familiarity with the Olds Strategic Sustainability Plan.
    b. Dialogue: Citizens will have an equal opportunity to participate and to debate throughout the engagement process and following the engagement process.
    c. Decision Making: Citizens will take ownership of the decisions that are made including final recommendations.
    d. Transparency: Processes will be open, accessible, and well-documented.
    e. Adequate Time and Resources: Despite time and dollar constraints success will come from the citizens and leadership of our community.
    f. Outcome: The results of the evaluation of the engagement will lead to better citizens making better decisions.