

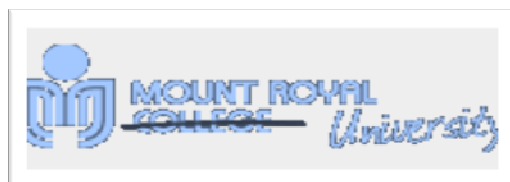
# 2009

## Summary of Leadership Forum

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**Project Partners:**

- Alberta Council of Disabilities Services
- Calgary Workforce Council
- Calgary Service Provider Chairs' Council
- Calgary Region Community Board
- Community Rehabilitation Service Provider Council of Calgary
- The Calgary Foundation
- The Vocational and Rehabilitation Research Institute
- Mount Royal University



## **Background**

The Community Disability Services sector gathered comprehensive labour market intelligence through a provincial workforce initiative called Workforce 2010. The research established foundational information which indicated the sector's long term viability was at serious risk. High turnover rates, of over 40% for community-based agencies providing support to adults with developmental disabilities, coupled by low enrolment rates in related post secondary programs may result in a less qualified workforce. A largely female workforce (80%) with up to 40% of the employees having education levels of high school or less, is responding to increasing demands for service from an ever-expanding and complex population.

The Calgary experience is comparable to the provincial perspective. Labour market demographics for service providers serving adults with developmental disabilities indicated the workforce was comprised mostly of female (78.7%) employees working in direct service (80%) positions with a significant percentage (38%) with educational levels of high school or less. Age distribution also reflects that of the provincial data with a high percentage of employees age 35 years or less (44%) and over the age of 45 years (30.6%) reinforcing the need to take steps to address the anticipated leadership gaps.

In response to this labour market information, the Alberta Council of Disabilities Services (ACDS), the Calgary Workforce Council, the Calgary Services Provider Chairs' Council, the Calgary Region Persons with Developmental Disabilities Community Board (PDD), Community Rehabilitation Service Provider Council of Calgary, The Calgary Foundation, the Vocational and Rehabilitation Research Institute (VRRI), and Mount Royal University partnered to focus on leadership development and sustainability. Specifically, they wanted to identify future leadership needs, create solutions, and develop a shared plan to implement these solutions within the Community Disability Services sector.

A study was commissioned to identify issues and possible solutions to leadership development and sustainability across the community disability sector. The partnership also hosted a forum to discuss the implications of the study.

## **Leadership Forum**

Forty-eight participants, representing twenty-two organizations were involved in the Leadership Forum on October 1, 2009 (see Appendix 1). The purpose of the workshop was to provide participants with: an increased awareness of the issues associated with leadership development and sustainability as identified by community disability service providers, an understanding of potential operational and structural strategies to address these issues, information on which to make an informed decision about their involvement in a sector-wide solution, and an opportunity to articulate their contribution to a sector-wide strategy.

Participants were given a copy of the Leadership Development and Sustainability Report prior to the Leadership Forum.

## **Reflection on the Leadership Development and Sustainability Report**

After an overview of the report was provided, the participants were asked to work in small groups to consider what aspects of the report resonated with them, what findings concerned them the most, and what implications the findings had for the role of individual organizations. A summary of the participants responses is provided in Appendix 2.

Generally, participants felt that the report findings were consistent with their perception of the issues surrounding leadership development and sustainability. There was some frustration expressed that these issues had been identified previously and that action needed to be taken to resolve them. Although there was an expressed need for well-trained personnel and in particular leaders, participants were concerned that time and resources for the development of personnel was limited. Some of the participants felt that the current training strategies need to be modified and that potential solutions existed beyond the current funding structures and systems. One participant suggested that there is a link between the perceived lack of inspiration and creativity that currently characterizes the Disability Services sector and the inability to attract employees and retain emerging leaders.

Five points were made by participants in the morning discussion which remained as themes throughout the day. The points were:

- there is a need for increased funding for training and salaries. Increasing resources for salaries and training was viewed by the participants as a critical recommendation.
- systems-level changes beyond leadership development are imminent. Predictably some agencies welcome these changes while others have some trepidation about the implication of these changes for their organizations.
- there is a considerable amount of variation among the agencies with regards to their capacity and resources. Ultimately, this variation in capacity impacts their perspective and their ability to participate, collaborate, and be involved in a number of issues including leadership development.
- collaboration among agencies was identified as important. Participants noted that collaborations are occurring now among agencies. The participants did acknowledge that there are different understandings of what collaboration means and there are few, if any, collaborations focused on leadership development.
- clarification of outcomes as they relate to service delivery and leadership development is necessary.

## **Sector-wide Leadership Development Strategies**

In the afternoon participants were provided with an overview of four strategies that might be used to provide structure to support sector-wide leadership development and the implementation of the Leadership Development and Sustainability Report's recommendations. The four suggested strategies were: maintain the status quo, develop a centralized performance outcome strategy, develop a disability sector leadership network, or develop a cross sector local leadership collective. One participant also suggested a fifth strategy which consisted of a combination of the four proposed strategies.

Participants, working alone, selected the strategy they liked the most and posted two strengths of this strategy. Still working alone, participants were asked to select the strategy they were most concerned with and post two concerns for this strategy. Participants were then randomly assigned to one of the strategies to discuss and identify some actions to address the concerns identified for their assigned strategy. Appendix 3. is a summary of these responses.

Given the overwhelming number of concerns and the paucity of strengths identified by participants for the **Status Quo Strategy** it was decided by the participants to discontinue any further discussion of this option. That is, all the participants considered continuing to use the current approach to leadership development as inadequate and in need of modification and change.

Participants identified a number of strengths of the **Centralized Performance Outcome Strategy** and six concerns with this model including a lack of a common vision, perceived increased costs, competencies issues, rigidity of the central body, and the fact that not all agencies would participate. Strategies to address these concerns were identified including establishing a common vision, bylaws, charter, outcome measures, and structure to guide the organization, and encouraging participation of all the agencies. Two participants suggested they would be interested in further discussion of this strategy.

The idea of a **Disability Sector Network Strategy** was viewed as having a few strengths including that it was familiar and therefore more likely to be adopted. Concerns identified for this strategy included the threat of a single agency taking over the network, and inadequate capacity of some agencies to be involved in a network. It was suggested that safeguards could be built into the network formation to deal with these concerns. Six participants suggested they would be interested in further discussion of this strategy.

Participants viewed the **Cross Sector Local Leadership Collective Strategy** as having a number of strengths. Four concerns were identified including the lack of understanding of other sectors regarding the work of the disability and non-profit sectors, the fear of sharing between agencies, the possibility of too many wanting to lead the collective resulting in in-fighting, and the fear that the issues of the Disability Services sector could be overshadowed by other more powerful sectors. Actions such as providing education to other sectors, sharing resources and stressing the diversity of the collective were suggested by participants. Twelve participants suggested they would be interested in further discussion of this strategy.

The **Combination of the Four Strategies Strategy** was considered to have a number of strengths including that it combined the strength of the network, centralized and cross sector models and allowed issues beyond leadership development to be addressed such as funding, advocacy, and public awareness. There was a concern expressed that the formation of this strategy would require a redirection of resources from current service providers. Ten participants suggested they would be interested in further discussion of this strategy.

## Next Steps

It was apparent, during the Leadership Forum discussion, that participants were not satisfied with the current status of leadership development and sustainability and were anxious for concrete steps to be taken to address the issue. Participants expressed an interest in pursuing the development of some type of network focused on leadership development. Given this feedback, it was agreed by the partnering organizations that:

- a proposed network framework will be developed for discussion and consideration of the interested organizations
- the Calgary Workforce Council will lead the development of the framework and will solicit the involvement of other partners (e.g., Calgary Service Provider Chairs' Council, Community Rehabilitation Service Provider Council of Calgary) concerned with human resource and leadership development in the Disability Services Sector.

## Appendix 1. List of Participants

Name	Organization	Position	Phone Number	Email Address
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Participants – 48  
Agencies represented - 22

## **Appendix 2. Participants Reflection on the Leadership Development and Sustainability Report**

### **What in the report resonated most with you?**

- field not being considered as a career
- set the stage to work collaboratively as a sector - cross sector training
- changes are in the air - some are excited some are fearful
- community perspective - no one player, need to work together
- where do we get challenge, creativity and inspiration; these are things we have lost
- there are a lot of recommendations; we know this and have tried some of these; we know this but how do we get there?
- educational levels
- depending on one's perspective it is "the best or worst of times"
- recognition that everyone's leadership is important, not just that at the head of the organization
- here we are talking about it again

### **What in the report concerns you the most?**

- without being seen as a movement how/why will future leaders come forward?
- mentoring - not enough time and energy ; challenged with getting the day to day operations done
- potential competitiveness for staff among agencies
- wages and resources an issue
- basic training needs information added to it
- there is a double cost for funding training - people need to be covered off
- experienced trained staff are leaving
- the clinical resource team is no longer available
- some leaders were not involved in the study - we need to get their participation and perspective
- do we have the right leaders in the sector now? - need to do a gap an analysis on skills of our current leaders
- agencies not on the same playing field - before collaboration (meaningful) can occur.

### **What implications do the findings have for the role of individual organizations?**

- opportunity to build upon existing training
- rethink/re-evaluate if existing training strategy is working -regional/provincial
- report missing bigger/systems level perspective regarding leadership; needs to broader view of the issue; systems thinking within and across sectors important
- get out there and be heard for who we are ; need a rehabilitation revolution; as a social movement coming together to deal with social issues
- recognition that we have to do something - what we are doing now is inadequate
- improvement and dealing with needs/issues needs to happen outside of the existing system/framework; can't be solved with current funding structures; need to clarify who should do that and what are the targets
- how do we get new staff - there is a link to creativity and inspiration

- what is it that draws workforce in? do our structures and ways of thinking delimit this? Do we need a different leadership style?
- monitor sector-wide performance outcomes - this is exciting and scary; we will need some flex; don't want to limit our creativity
- sector-wide targets OK - need some flexibility working inside organizations; people can achieve outcomes in different ways
- know we need to move forward - time and resources are the biggest barriers
- create competence map for leaders and use as a development tool
- need to know what are the impressions of other stakeholders (e.g., employers) do they think like we do about outcomes?
- What are the goal and objectives for collaboration? There is a lot of talk but tend to do more in crisis mode. Need to attach and develop collaboration outcomes.
- outcomes related to organization - not just funder outcomes; there are system and organizational outcomes.
- need to be clear and agree on a definition of leadership; look at other definitions
- agencies are at different levels which effects ability to their readiness to collaborate
- central agency could mean an economy of scale
- What about leadership beyond the level of senior executives? - need to develop a pool of leaders and consider everyone a leader
- only bottom level covered; difficult to collaborate when having such "far apart" views; different size organizations view things differently which makes it difficult to collaborate
- how do we get creativity and inspiration back - need to get beyond funding and operational challenges
- how do we get staff to "hit the ground running"?

## Appendix 3. Participants Identification of the Strengths and Concerns with Various Sector-wide Leadership Development Strategies

### 1. Status Quo Strategy

Strengths	Concerns	Strategy
<p>Group therapy</p> <p>Allows agencies to stabilize human, financial, and intellectual resources before moving forward</p> <p>Predictable and safe</p>	<p>We'll still be discussing the same issues as a collective that we have been discussing for years; isn't getting us to where we want to go; talking and no action on addressing the concerns we know and acknowledge; this is a definition of insanity</p> <p>Ineffective without additional resources or change of funding framework</p> <p>Will not necessarily lead to rejuvenation of the sector - recognition and valued as a professional</p> <p>It is stagnant - without new ideas we cannot grow; the world is changing around us, standing still is not an option unless we want to be left behind; head in the sand approach what kind of leaders would we be?</p> <p>Not achieving results; outcomes not clearly defined or agreed upon</p> <p>Leadership is being lost - emerging leaders are leaving field before they become leaders; we are losing the bright "stars"</p> <p>Divide and conquer; splitting passion and resources; divided goals and values - no direction for the future</p> <p>We have unskilled leaders in the field and this may lead to decreased level of individuals entering the field of human services</p> <p>The status quo assumes there is no better way</p> <p>Groups continue to work in</p>	

	<p>isolation; coordination of collective goal is lacking</p> <p>Need for there to be a feeling of evolution however random movement may not lead you to a better outcome just a different outcome</p> <p>No ability to lobby</p> <p>If you think there is nothing wrong in your agency you might not see that there is potential in other areas - be open minded</p> <p>Inefficiencies are sustained; more costly to develop on an individual basis (3)</p> <p>Focused on organizational sustainability not sector-wide sustainability</p> <p>Working autonomously increases variance of mentoring</p> <p>Beliefs of leadership never goes beyond the person running the agency</p> <p>No process in agencies that do not have the resources to do so</p>	
<p><b>Next Steps</b> no new steps were identified</p>		
<p><b>Those Interested in Discussing this Model</b> no one was interesting in further discussion on this model</p>		

## 2. Centralized Performance Outcome Strategy

Strengths	Concerns	Strategy
<p>Already works with agencies; capitalizes on existing agencies and resources - if it's not broke why fix it?</p> <p>Develop closer partnerships</p> <p>The overall vision of leadership can be maintained - wouldn't be lost with agency leaders</p> <p>Cost savings for materials; training can be provided and shared by all agencies; reducing administration costs; give more opportunity to have the same resources to be provided to line employees; ACDS taking on identifying training needs and purchasing, facilitating, and providing training with the appropriate resources to do so</p> <p>Creates a professional unified body; easier to maintain standards and implementation</p> <p>Results in action - need leadership to provide direction and focus efforts</p> <p>Focused and coordinated approach to address issues; community leading community</p> <p>Easier for each agency to find training that is required for that agency - one source to connect with</p> <p>Sector has a great deal of expertise and knows its culture - have to learn to market</p> <p>Already working to develop this type of leadership mentoring</p> <p>Create the least amount of additional work for individual agencies</p>	<p>May cost more than other models including the status quo</p> <p>Competency - the ability to address authority</p> <p>Perceived as non-flexible and rigid</p> <p>Monopoly and competence of new agency</p> <p>Not all agencies participate</p> <p>Lack of a common vision</p>	<p>Could combine with another model; could be funded properly; bulk purchasing, shared training could reduce duplication of effort</p> <p>Give new entity the authority (e.g., bylaws, charter, structure); community could take role in guiding the new agency</p> <p>Set the charter to be flexible; design checks and balances; have the community drive it</p> <p>Community involvement; representation from stakeholders; define outcome measures they are accountable for</p> <p>Accept it and encourage participation; engage and give information; develop an engagement strategy</p> <p>Establish a common vision</p>

<p><b>Next Steps</b></p> <ul style="list-style-type: none"> <li>✓ establish common vision, values and charter before moving forward; would need funds for a consultant and for session</li> <li>✓ define leadership and authority/scope- 3 day think tank with consultant creating draft document</li> <li>✓ involve community members, self advocates, and PDD</li> </ul>		
<p><b>Those Interested in Discussing this Model</b></p> <ul style="list-style-type: none"> <li>• Tom Snell (Columbia College)</li> <li>• Doug Luft (Supported Lifestyles Alberta Ltd)</li> </ul>		

### 3. Disability Sector Leadership Network

Strengths	Concerns	Strategy
<p>Common goals vision, and values</p> <p>Already have relationships</p> <p>Build on current strengths</p> <p>Familiar, more likely to adopt</p> <p>Sources of new ideas within sector</p> <p>Sharing resources, best practices, can go further</p> <p>Can go outside sector when network is strong</p>	<p>Threat of takeover by single agency</p> <p>Weak links do not make a strong chain</p> <p>Cost implications does not always mean costless</p>	<p>Network is set up to combat that, safeguards built in; different agencies have different specialties and play to those strengths</p> <p>The whole is greater than the sum of its parts; work to strengthen weak links; building in mentoring opportunities</p> <p>Everything has costs (even doing nothing); networking costs time, money, go into this knowing that; measure the return on investment</p>
<p><b>Next Steps</b></p> <ul style="list-style-type: none"> <li>✓ find out who the interested agencies are and their capacity</li> <li>✓ map out current networking happening</li> <li>✓ group of ppl willing to kick start process</li> <li>✓ involve everyone and ensure executives and boards give green light to share - might be sharing intellectual property</li> </ul>		
<p><b>Those Interested in Discussing this Model</b></p> <ul style="list-style-type: none"> <li>• Joan Lee (VRRRI)</li> <li>• Leslie Tamagi (VRRRI)</li> <li>• Jane Myatt (Vantage Enterprises Ltd)</li> <li>• Doug Luft (Supported Lifestyles Alberta Ltd)</li> <li>• Michelle Wolfe (Calgary SCOPE Society)</li> <li>• Denise Young (Calgary SCOPE Society)</li> <li>• Yvonne Martodam (Alberta Council of Disability Services)</li> </ul>		

#### 4. Cross Sector Local Leadership Collective

<b>Strengths</b>	<b>Concerns</b>	<b>Strategy</b>
<p>Not limiting or isolating</p> <p>Leadership needs awareness, connections and understanding across sectors</p> <p>Untapped potential; global thinking, new connections, potential partners, resources, ideas and experience</p> <p>Business minds, stakeholders stimulation</p> <p>Opportunity to learn from other sectors; access and contribution from a variety of stakeholders</p> <p>Promotes inclusion support to drive system change; allows for issues beyond leadership to be addressed such as funding, government advocacy, public awareness, program alignment</p> <p>Allows for networking of services and ensuring services for individuals meet the individuals needs as a whole (e.g., disability, health, justice services)</p> <p>A strength is if it is interest and not geographically based</p> <p>Helps reduce tunnel vision; can answer how the field is perceived externally</p> <p>Broader CLLC vision</p>	<p>Lack of understanding of other sectors and other sectors not working day- to-day with the non-profit sector may result in them offering unrealistic advice</p> <p>Fear of sharing; there may be agencies that do not want to share; also may lose employees</p> <p>Too many overseeing; could lead to too many chefs spoil the soup and why would business share work secrets</p> <p>Big Voice Rules; often the biggest or strongest rules and we have values we want to protect (e.g., no medical model); it will difficult to form the alliances to make this happen</p>	<p>Lack of understanding could be addressed through education and knowledge</p> <p>Fear of sharing could be addressed through including others and resources</p> <p>Too many overseeing could be addressed through diversity- the diversity this model provides; develop model that blends network and cross sector</p> <p>Big Voice Rules could be addressed through equality and pressure</p>
<p><b>Next Steps</b></p> <ul style="list-style-type: none"> <li>✓ Find out who is using this approach - research asset mapping</li> <li>✓ Have an event - relationship building, mentoring; make it fun and visible</li> <li>✓ Approach funders for resources (e.g., AEI, UW, Calgary Foundation, Chamber of Commerce, small business, HRDC, City of Calgary, ANSVI (Government and non-profit culture and community spirit HR sub-committee), and Public Interest Alberta)</li> <li>✓ Invite Stakeholders and do it again (e.g., have an event)</li> </ul>		
<p><b>Those Interested in Discussing this Model</b></p> <ul style="list-style-type: none"> <li>• Danuta Lang (Advanced Rehabilitation and Community Services)</li> <li>• Wendy Karst (Rehoboth)</li> <li>• Shelia Trew (Advanced Rehabilitation and Community Services)</li> <li>• Debbie Johnston (The Calgary Society of Community Opportunities)</li> </ul>		

- Soraya Saliba (Accessible Housing Society)
- Joan Lee (VRRRI)
- Doug Hauser (URSA)
- Leslie Tamagi (VRRRI)
- Michelle Wolfe (Calgary SCOPE Society)
- Doug Luft (Supported Lifestyles Alberta Ltd)
- Katherine Kautz (Calgary Alternative Day Options)
- Pat Morris (Connections Counselling and Consulting Foundation)
- Yvonne Martodam (Alberta Council of Disability Services)

## 5. Combination of Four Strategies

<b>Strengths</b>	<b>Concerns</b>	<b>Strategy</b>
<p>Combines the strengths of the network, centralized, and cross sector model</p> <p>Allows for issues beyond leadership to be addressed such as funding, government advocacy, public awareness, program alignment</p> <p>Sharing and bringing new ideas</p> <p>Cost effective approach</p> <p>Provides leadership to the architecture while maximizing stakeholders' engagement</p> <p>Expertise inward and outward</p> <p>Perspectives varied</p> <p>General public less confused about where our industry resides (i.e., branding the industry)</p> <p>Generational differences - if you ask someone under the age of 25 to write a job description for an ED you would look quite different</p>	<p>Difficult to set direction - will need a champion with passion, knowledge, connections to bring the issues to the forefront, capture the resources needed and build and maintain the consensual nature</p> <p>Takes resources for organization and cross-communication</p> <p>Must be fluid to move across existing disability sector and cross sector model</p>	<p>Send invitations out to cross sector and businesses to develop strategies to help each other develop leaders and structures</p>
<p><b>Next Steps</b> No steps identified</p>		
<p><b>Those Interested in Discussing this Model</b></p> <ul style="list-style-type: none"> <li>• Michelle Wolfe (Calgary SCOPE Society)</li> <li>• Doug Luft (Supported Lifestyles Alberta Ltd)</li> <li>• Leslie Tamagi (VRRRI)</li> <li>• Colleen Huston (Calgary SCOPE Society)</li> <li>• Myles Thurlow (The Calgary Society of Community Opportunities)</li> <li>• Adrienne Sabourin (Calgary Progressive Lifestyles Foundation)</li> <li>• Neal Sabourin (Calgary Progressive Lifestyles Foundation)</li> <li>• Elaine Yost Burak (Optional Rehabilitation Services (OPTIONS) Inc. )</li> <li>• Alexi Davis (Prospect Human Resources Services Society)</li> <li>• Melanie Mitra (Prospect Human Resources Services Society)</li> <li>• Yvonne Martodam (Alberta Council of Disability Services)</li> </ul>		