Striking the Balance: Exploring e

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Chapter 1: Introduction

When Executive Directors take on leadership roles at non-profit organizations, they quickly learn there are numerous tasks ranging from those that are more directly related to carrying out the mission of the organization to others that are focused on the business or technical aspects of the work. Mission can be defined as the purpose of the organization to help address a social inequity experienced within the community. For many Executive Directors, the initial motivation to work in the nonprofit sector entails a sense of passion and commitment to social justice which has been developed from lived experience as well as a desire to improve the wellbeing of others. At the same time, Executive Directors are organizational leaders who must also learn the business and technical work to meet the demands of leading a nonprofit. They must handle budgets, seek funding, and oversee staff while carrying out other managerial duties. Increasingly, within the nonprofit sector the need for Executive Directors to have expertise in these areas is emphasized in their day to day learning and tasks which reflects the increase of neoliberal values on the sector that emphasize competition and accountability. Due to limited time, money and resources for education, many Executive Directors will often learn both mission and business skills informally rather than through structured educational opportunities. Understanding how Executive Directors negotiate the tension and strike a balance between the learning required to carry out both the mission and business aspects of their work as a part of their leadership role is the focus of this thesis.

This small-scale qualitative study involves interviews with eight Executive Directors of small to medium sized nonprofit organizations in Canada. This research study is situated in the field of lifelong learning/adult education but is connected to research done in the business and nonprofit sector. Adult education is historically rooted in connection to a social purpose

tradition, which Martin (2006) describes as learners being social actors engaged in pursuing social and political interests. In this context, knowledge is socially constructed to advance collective efforts, teaching is placed within conversations rather than lectures, and an important component of education is that it enables more people to fight for democracy. In recent decades there has been much debate about the value of lifelong learning in connection to issues pertaining to citizenship and civil society, and the role of non-profit organizations focused on addressing issues of inequality are integral to this work.

Active Citizenship is understanding the diverse issues being experienced in the community and then working together to

Active citizens use democratic p

(Wildemeersch & Vandenabeele, 2007, p. 21). Adult education is essential in socializing people to become active citizens by providing basic education (literacy skills) to ensure citizens are not marginalized as well as teaching people to critically think to improve their communities (Torres, 2006). Arguably, such education is needed as our social and political life is increasingly being impacted by market mechanisms resulting in apathy to public matters and a decline in democratic practices (Wildemeersch & Vandenabeele, 2007). Executive Directors can become active citizens by

non-

urpose to help address a social inequity experienced in the community**.** However, the societal demands of managing the non- business aspects can make balancing mission work difficult. Executive Directors must also have the technical skills to ensure financial sustainability and

support staff to guard the organization survival. How Executive Directors learn to balance these demands is a complex process leading to multiple understandings of effective leadership. identity and practices reflects how they balance their understanding of societal expectations of leading a non-profit.

Societal expectations have become increasingly complicated to negotiate as Executive Directors are expected to focus on the missions, such as addressing homelessness, food insecurity, or racial inequality. Within this context, being an active citizen and leading democratically needs to be at the forefront of running a social justice non-profit. Executive Directors also require the skills of a business manager and the ability to secure funding and revenue to deliver the non- services. Arguably, both factors are needed to be an effective non-profit leader.

Welton (2013) argues that Canadian adult educators are currently struggling to maintain lifelong learning as corporate growth and development models increasingly instrumentalize learning (p. 213). However, adult educators involved with social movements often centre their work in the practice of creating equity amongst individuals, families, communities and within society (Nesbit, 2013).

Using an adult education lens acknowledges that learning to become a leader in the non-profit sector requires technical, administrative skills. For those who work in non-profit organizations that have a social justice focus, their work also contributes to the development of a robust

organizations (and) reserved only to such activities of citizens which are on the levels of family, volunta (Bron, 2006, p. 91). Adult education is essential to creating a civil society that is supported by well-informed active citizens who can strive to

challenge the status quo and reinforce democratic values**.** A robust civil society encourages people to learn to care for one another, value solidarity, take responsibility for others and become dedicated citizens (Wildemeersch & Vandenabeele, 2007)**.** Non-profits that work to improve social justice can be gathering places where people share interests, concerns, and a sense of purpose within the civil society sector that is separate from the government and private businesses.

Through their leadership, Executive Directors have opportunities to create these gathering places within nonprofit organizations, thus contributing to the development of civil society. Civil society is integral to a democratic society ability to provide a platform for marginalized and silenced voices. However, Executive Directors vary in terms of how they create space within their non-profits for citizens to communicate, discuss, and considered issues that are impacting the community. To foster social change requires Executive Directors to identify not only as a leader of a non-profit organization but also as a leader that contributes to building a strong civil society.

learning shapes leadership identity and practices to perform this important role is needed.

Context

This research study was conducted during the Covid 19 pandemic which created social and economic disruptions worldwide such as school closures, event cancellations, food

health equity and individual rights. Aspects of this research were influenced by the pandemic**,** such as th their perspectives of living in uncertain times.

Executive Director and non-profit work in creating equality was validated during the

the

growing support for Greta Thunberg to act in protecting the environment**,** and increased efforts to create reconciliation with Indigenous peoples in Canada**,** had already been gaining momentum. Covid 19 not only affirmed the importance of addressing these issues, but brought to light inconsistency in

mental health, employment, and education. When a movement like Black Lives Matter gained momentum during the pandemic, social justice (the center of most non-profit work) gained increased public awareness and support.

In addition to highlighting social justice issues, the Covid 19 pandemic has also

technical skills and knowledge around innovation, sustainability, and financial acumen. Many Executive Directors were reminded of their fiduciary responsibilities to their organizations. In addition to converting to the online delivery of services and programs and using physically distanced practices, Executive Directors had to rethink fundraising events and how to deliver on project grants. They made tough decisions about decreasing operating hours and eliminating staff positions, reducing operating and programming expenses, and were involved in strategic planning in uncertain times. Conducting this research during the pandemic was significant because Executive Directors were especially challenged to provide leadership that reflects active citizenship and democratic practices while managing extraordinary economic limitations.

Overview of Research Study

This small-scale qualitative study involves interviews with eight Executive Directors of small to medium sized, social justice orientated, non-profit organizations in Canada. Organizations were limited to those with less than ten full time staff and/or started with budgets under $800,000. Executive Directors of organizations that fit these criteria may have the most

experience working directly within the social mission and business aspects of the organization**,** given the limited staff numbers

organizations included two homelessness and poverty non-profits, one literacy non-profit, one mental health non-profit, two employability non-profits, and two youth serving non-profits. This study focused on non-profits with a primary emphasis on social justice, rather than non-profit organizations in the recreation, industry advocacy, hospitals, and post-secondary sector. Their work directly impacts Black communities, Indigenous communities, women, and people with disabilities. One Executive Director was retired, four had ten to fifteen years experience, and two had three to five years experience. Two of the Executive Directors founded their non-profits. The participant**s** live in either Ontario or Atlantic Canada and are all English speaking.

A life history approach was used to better understand the role informal learning has had on the Executive Director participants. A life history approach allows individuals to tell their story and brings attentiveness to the common imbalances of powers and the tendencies of those who possess this power (McNeill, 2005). These revelations bring new meaning to individual lived experiences and help place those experiences into a larger context**,** which facilitates an understanding of how lifelong learning informs leadership identity and practices. The Executive Directors shared their early experiences within families, communities and workplaces in the non-profit sector that informed their leadership.

During a recorded, semi structured interview that was conducted by phone or Skype, participants were asked to reflect on their lifelong learning from childhood to present day to discuss how they identify and practice their leadership. Interviews were audio recorded and transcribed and participants were given the opportunity to review the transcripts. Once finalized, the transcripts were then coded using key words and phrases. Using a critical theoretical lens,

themes and narratives were developed to explore how Executive Directors informally learned to become non-profit leaders based on insights they shared on their personal identity and practices.

Research Inspiration

My own learning experiences about non-profit leadership has been informed through various life experiences. Although as a child and youth I was never engaged in a formal leadership role amongst my peers (such as being a team captain or student council member) my early life experiences laid a foundation of the beliefs and values that serve as my leadership compass. Understanding how my own lifelong learning has informed my leadership identity and practice made me curious of how other non-profit

approach to leadership. I now offer a short reflection of how lifelong learning has informed my understanding of leadership.

I am a White, heterosexual, cisgender woman who was raised by my single parent mother in rural Nova Scotia. G

uncommon, but labels and stigma did not stop my mom from regaining her independence. Since her nursing degree was obsolete, she had to study night after night to gain the credentials to become a lab technician despite the challenges of raising three daughters on her own. She never complained or felt sorry for herself and refused to let anyone else determine her potential. She studied and worked hard to provide us with a comfortable and stable home.

However, this meant that my sisters and I had to manage day to day challenges on our own at an early age. Our all-female household meant that we shared responsibilities of cooking, cleaning, repairing, and maintaining a home. Of course, money was limited so we learned to budget, make good financial choices and be conservative with our spending. I had to fundraise to

participate in extra curricular activities. I learned to assume life to be hard and making it better meant working hard which built my resiliency. My self- confidence grew as I learned how to manage bullies, not become a bully myself and learn to trust others. pay much attention to my schoolwork and yet I was not reprimanded by my teachers. I put very little effort into my studies and had no particular career aspirations. However, I did develop a deep desire to help others who were treated unfairly, even though this could get me in trouble, and I was often told to mind my own business.

These early experiences of seeing my mom change her trajectory and overcoming my own challenges shaped my understanding of leadership. First, I believe that leadership is not defined by title or position but is demonstrated through our actions. Second, being true to your morals and values is more important than gaining social status or financial rewards. Third, working together and helping others supports equity. Finally, our status in life is not static and it is possible to change our circumstances as my mom had. I was compelled to find work that encouraged me to practice these values, which proved to be in the non-profit sector, though I did not plan for that career.

I have worked in the non-profit sector for almost twenty years. For the first ten years I served as an Executive Director for a small youth organization that is affiliated with a large non-profit. My values and worldviews that I learned through my family and community helped prepare me for the tenacity and compassion needed to provide leadership. However, I was quickly overwhelmed with the and found that my learning to date had not equipped me to lead administratively. During this time**,** I engaged in informal learning through participating in networks, finding mentors**,** and involving the community. These different interactions played a key role in developing my leadership capabilities. Like the Executive

Directors in this study, informal learning helped my understanding of democratic practices and encouraged me to become a more active citizen, while also developing my skills to become an effective administrator.

After this experience in the non-profit sector, I decided to pause and deepen my learning in the field of adult education and work towards a Master of Arts in Adult Education by enrolling in the Graduate Studies in Lifelong Learning program at Mount Saint Vincent University. After reading critical theory throughout this research, I came to view the work of Executive Directors who lead non-profit organizations as more than just members of a profession that strives to do immediate good and help others, but also as an integral part of creating a more equitable and democratic society. I also began to recognize how the work of non-profit leaders is influenced by neoliberal ideologies. This has led to my interest in exploring key topics taken up by critical adult educators influenced by the work of Jürgen Habermas, such as active citizenship, civil society, and democratic leadership.

Theoretical Framework

This thesis explores how Executive Directors of non-profits develop their leadership identities and practices**,** recognizing that these organizations contribute to a vibrant civil society sector. One of the challenges that impacts Executive Director learning is that neoliberalism is increasingly shaping our societies. Neoliberalism can be characterized by the emphasis on competitiveness, individual choice, and marketplace values (Gouthro, 2009)**.** Critical adult education theory, such as the work of Jurgen Habermas, considers how these issues can be addressed to create a more just society.

capitalism shapes social relations and imposes often without our knowledge belief systems and assumptions (that is, ideologies) that justify and maintain economic and political inequity (Brookfield, 2005, p. 13). Imbalances in power relations are present and cause people to be treated unfairly, yet the uneven distribution of power is justified and supported to uphold conventional systems that help maintain order. People are only able to free themselves if they use a critical lens and question the dominant ideology (Brookfield, 2005). Educational research using a critical theoretical lens can help us reflect on the impact of capitalism, to inform the work of those who wish to create a more egalitarian society, and to raise an awareness of non-emancipatory structures.

Incorporating critical theory into research is an active way to develop our knowledge rather than passively accepting the negative impacts of capitalism. Sumner (2003) suggests that research has an obligation to use a critical lens.

> Building a relationship with neo-classical economics from a critical interdisciplinary perspective, gives us [the researcher] the confidence to approach it, challenge it, critique it, and inject new knowledge in our lives knowledge that can counter the negative impacts of neo-liberal globalization and foster new understandings of what the world could be (Sumner, 2003, p. 9).

Research then plays a role in discovering how we can actively create a more democratic society that opposes the dominant ideology. Critical theory can be used to help individuals gain awareness of non-emancipatory structures, whether these are physical institutions or worldviews, which are impacting their learning (Finger, 2005). These revelations bring new meaning to individual lived experiences and help place those experiences into a larger context.

Ideological critique is a Marxism term that is associated with thinkers from the Frankfurt School of Critical Social Theory**,** such as Adorno, Horkheimer, and Marcuse (Brookfield, 2000). Habermas, an interdisciplinary theorist, is known as a leading second generation Frankfurt School theorist, and is best known for his work *The Theory of Communicative Action* (Finlayson, 2005). Habermas (1984, 1987) argues that communicative action is a way for people to create a more socially just and democratic society. He suggests that tensions are increasing between the system and the lifeworld as societies have become more complex. The system refers to the broader social, political, and economic structures in society. Over time, system imperatives have encroached upon the lifeworld**,** which is demonstrated by the increasing emphasis of business practices in non-profit work such as the focus on accountability to government funders.

Habermas incorporated early concepts such as instrumental rationality (using science and technology to justify thoughts and decisions) to understand how institutions and systems come to dominate our thinking. This can lead to false beliefs that are assumed to be true and go unquestioned. Our day to day decision making is then not based on our experiences and relationship**s,** but rather through policies, procedures**,** and rules**,** as the system becomes stronger and more controlling. The lifeworld (as experienced in our everyday social interaction with family, friends and local community) is threatened by the increasing influence of the system in neoliberal times.

Overview of Thesis

Chapter Two is a literature review that draws from adult learning and education as well as non-profit/business literature. I provide an overview of neoliberalism s cultural influences on learning in the non-profit sector. I then focus on how leaders develop an identity and learn to

lead democratically. This is followed by a brief overview of how critical theory is used in educational research.

In Chapter three I discuss how qualitative life history approach is used to create an understanding of leadership identity and practices. I provide details on the methods used in the research study, including recruitment of participants, ethical considerations, research questions, data collection and analysis, and an explanation of how relevant theme and narratives were constructed from the data.

Chapter Four is divided into two sections. The first section is organized by themes that show how Executive Directors learn for the system thus creating administrative identities and practices as organizational leaders working in a neoliberal climate: securing and competing for funding, indoctrination of business values, and the role of board members. The second section discusses how Executive Directors learn from the lifeworld to influence their leadership identity and practices that informs the mission focus of their organization, through transformative, intersubjective and citizenship learning. This section shares unique Executive Director experiences informally learning through narratives under each of these themes.

Chapter five considers Executive Directors in understanding the business aspects of running a non-profit organization that led them to identifying and practicing as administrators. The second part of this discussion focuses on how Executive Directors informally learn to fulfil the mission component of their work in their role as active citizens and practices. Using critical theory, I consider why striving to balance these competing demands may be problematic to being a leader that effectively contributes to civil society. I then explore the types of learning that needs to be supported and recognized for Executive Directors, including informal learning, mentorship, networking opportunities, and potential for critical reflection.

In the final chapter I discuss the implications this research has on how we view informal learning in the non-profit sector and the impact on Executive Director identities and practices. As well, Executive Directors need to be mindful in selecting mentors and creating a network that supports the development of democratic practices. Finally, Executive Directors need to critically reflect on whether their learning helps them challenge systemic assumptions and expectations and not just fix day to day problems. I suggest several areas that require future research to better understand the impact of informal learning in shaping Executive Director identities and practices.

Chapter 2: Literature Review

This literature review includes both research in adult education and non-profit/business fields and is organized into the following sections: understanding neoliberal culture influences on non-profit leadership learning, key informal learning concepts, leadership identity formation and democratic practices.

Learning leadership within a Neoliberal Culture

Increasingly, critical adult educators note that neoliberalism is impacting upon how our societies are constructed (Welton, 1995; Brookfield, 2005; Gouthro, 2006; Jackson, 2011; Nesbit, 2013). The non-profit sector in Canada faces three factors that influence Executive changes in federal and provincial funding models, a diminishing role in advocacy and the search for leadership within and outside of the sector (Cave 2020; MacIssac, Park, & Toupin, 2013). These societal issues can impact how Executive Directors identify and practice leadership within the non-profit sector.

Neoliberalism regards individuality and competition as more important than collective interests or common good. Harvey (2006) describes:

> (Neoliberalism) is a theory of political economic practices which proposes that human well-being can best be advanced by the maximization of entrepreneurial freedoms within an institutional framework characterized by private property rights, individual liberty, free markets and free trade. (p. 145)

Individual freedom is assumed and propels political and economic life (Eikenberry, 2009). In the adult education literature, critical thinkers argue that this influences learning because education

is often designed to meet economic demands and train people with the skills needed to competitively compete in the market rather than focusing on social responsibilty.

In a neoliberal context, Executive Directors should prioritize learning technical skills such as financial management, marketing, human resources, and other business skills so non-profits can stay competitive in the market or at least be sustainable. University non-profit leadership programs and numerous workshops can reflect these values when the primary focus is on teaching business skills. Consequently, focusing on developing technical skills may lead Executive Directors to unintentionally identify as mainly administrators rather than as leaders working towards a more socially just society.

Executive Directors are encouraged to learn skills on financial stability and accountability as funders are looking for clearly articulated returns on investments. Government funding increases the need for skills such as effective outcome measuring, quantitative evidence based reporting, technical/database knowledge, change management and financial accountabilty (MacIssac, Park, & Toupin, 2013a, MacIssac, Park, & Toupin, 2013b; Cave, 2020). Government funders are increasingly providing less core (operational) funding in favour of project based funding such as commissioning. Governments commission both non-profit and private organizations to deliver predetermined, identified services or programs to a community. Although ideally governments work collaboratively with non-profits to identify needs, often this process lacks consultation and tenders are often open to the private sector resulting in increased competition for funding (Cave & Lalonde, 2020). Executive Directors are then further encouraged to focus on developing technical skills needed to write successful bids to stay competitive rather than understanding community based knowledge.

Working within this neoliberal culture, Executive Directors learn to introduce new practices that help manage the social mission-market tension. Bish & Becker (2016) cautions -profit sector may overlook some of the nuances encountered in a non-profit anders (2012) suggests that non-profits need to alter business language to more accurately fit the context of non-profit sector work**,** Internal and external communication practices can be inclusive and focus on the social mission rather than economic benefits to avoid increased tensions (Sanders, 2015; Chenhall, Hall, & Smith, 2016). Decision making can range from being highly systematic and focused on stakeholders interests to more compassionate approaches that reflect the social mission (Chenhall, Hall, & Smith, 2016; Balser & Carmin, 2009; Bish & Becker, 2016). Executive Directors therefore learn to define, negotiate, and reconcile leadership within a neoliberal culture while serving the community.

Focusing on becoming strong administrative leaders can be detrimental in that Executive Directors spend less time consulting, educating, supervising and mentoring their staff (HR Council for the Nonprofit Sector, 2010). Executive Directors in smaller organizations are especially challenged as they are largely responsible for multiple management roles**,** as well as requiring technical or computer skills (MacIssac, Park, & Toupin, 2013b). Consequently, Executive Directors find it difficult to think strategically about their organizations and the sector in general (Global Scan Incorporated, 2012). Being obliged to meet administrative responsibilties, Executive Directors can experience disparity in how they identify as a leader and what is required to effectively lead (MacIssac, Park, & Toupin, 2013).

Executive Directors who identify as advocates within civil society have been somewhat silenced through government legislation and audits. In the past decade, numerous charities were subjected to vigorous Canada Revenue Agency audits for advocacy efforts (Cave & Lalonde, 2020). Charities have contested through extensive, costly litigation to protect their right for freedom of expression leading to revisions to the Canada Income Tax Act. However, Executive Directors are still hesitant to advocate, thus reducing

Executive Directors may be less likely to learn advocacy skills if they identify more as an admini -term, localized goals, as well as dependency upon government grants, mean(s) that advocacy is often s may then be more inclined The Executive Dire istrator for a service providing organization and a data source for community needs is then solidified (Cave & Lalonde, 2020).

Informal Learning

Learning to lead a social justice oriented non-profit organization within a neoliberal culture can be achieved through a variety of ways, from obtaining formal degrees and nonformal non-profit certificates, as well as learning informally through conversations and networks. Chunoo, Beatty, & Gruver (2019) argue that individuals who are working toward positive, sustainable change require preparation in leadership and learning about social justice issues in order to have the confidence and competence to undertake advocacy work in challenging settings. Much of this learning may occur informally as Executive Directors work through problems, reflect on past learnings and converse with others in the community. Business skills

may also be learned informally within the context of community**,** particularly when safe supportive spaces exist.

Informal learning occurs when one gains knowledge, understanding, skills or attitudes outside of formal settings such as schools, in unplanned ways through regular interactions with others often in workplaces (Hrimech, 2005). Informal learning is nonroutine when procedures and typical responses to situations are ineffective and one needs to rely on hidden or tacit knowledge to resolve an immediate situation (Marsick & Watkins, 1990). Eraut (2004) describes informal learning along a continuum, including implicit (linking past memories to the current situation), reactive (noting facts and opinions, asking questions, and observing the impact of others) and deliberative (engag 12 Tf1 0 dp/F1 12 Tf1 0 0 1 356.95 708.84 Tm0 g0 G[(unit)-13(y)] TJETQqpGc

exploring alliances (Marsick & Watkins, 2018, p. 10). Given the often limited funding for formal and nonformal education and training in the non-profit sector, informal learning is often the means by which Executive Directors learn to solve operational problems and obtain technical skills such as financial, marketing or human resource management.

However, in the non-profit sector not all problems, such as social justice issues, are easily

I situations require additional understanding of informal learning to explain how people counter systemic and embedded conflicts that disturb regular work routines (Nicolaides & Scully-Russ, 2018, p. 112). Marsick and Watkins acknowledge that their 1990 model did not recognize that informal learning must

> save our own mental effort. So, the individual process of making personal sense of the situation is likely to draw on a much wider range of cognitive resources, whether this is recognised or not. (Eraut, 2000, p. 132)

The personal knowledge used to help resolve workplace problems may reflect values and beliefs that create a just civil society. Eraut (2000) proposes that the learning process is complicated when

and practices (p. 132). However, individuals often do not recognize when learning occurs, they may view knowledge as implicit, and are unable to explain what knowledge has been gained, thus making researching informal learning challenging (Eruat, 2004). He suggests that analyzing practices can reveal not only the observable but also offer insights into hidden contributions such as prior knowledge, understanding, or beliefs when performing the task within various contexts.

To apply a new concept or idea to a situation, learners must first understand the situation using their prior knowledge, determine if this concept is applicable, change the concept to fit the new situation and then combine the new and old knowledge. This can create new meaning for knowledge that was previously understood:

> Hence what may begin as publicly available scientific knowledge, which people treat as having a universal meaning, may end up as a set of differentiated variations formed by the distinctly separate learning histories of a group of individuals. Adopting a socially situated perspective on knowledge may paradoxically lead to an even greater differentiation in the knowledge held by different knowers. (Eraut, 2000, p. 133)

when knowledge is resituated but when new knowledge is learned

technical skills but also the integration of communicative and relational understandings.

Billet (2007) argues that individuals have the agency to mediate norms and practices when learning in social situations. Throughout their life histories, learners engage and learn in the social world to undergo a unique set of learning experiences, perceptions of what makes sense, varied emotions and degree of impact of past experiences (Billet, 2007). It is important to consider not only how identity is learned by participating in practice but also how influences practices.

arising from their capacities, earlier experiences, and ongoing negotiations with the social and (Billet, 2009, p. 211). The individual and the social world mutually influence a workplace learning. While working, individuals make changes to how they work as they apply their knowledge, values and beliefs thus creating unique, subjective (ing) (Billet, 2008, p. 55). To properly understand work practices and the subsequent learning we need to consider individual subjectivities in addition to the context (Billet, 2010).

Informal learning occurs within social contexts that informs the individual and the individual informs the social context. However, learning is not just an individual process that occurs within the confines of a workplace. In recent years, critical theorists have explored the difference between Western and non-Western ways of knowing and how this impacts learning. Western ways of knowing are often considered valued knowledge and are therefore constructed within formal educational systems, while non-Western knowledge is often situated within the

community and is learned informally (Merriam & Kim, 2008). Non-Western knowledge, knowledge that does not rely on scientific thinking or established laws, may also inform leadership identity and practices. Merriam and Kim (2008) suggest that

perspective, learning is the responsibility of all members of the community because it is through this learning that the community itself can develop (p.73). Within the non-profits sectors the lines between workplace and community learning can be blurred as Executive Directors learn to fulfill social missions as well as carry out their administrative roles.

Learning to be Leaders in the Non-profit Sector

During the interviews, the Executive Directors stories provided insights into their beliefs and values, how they saw themselves as leaders and how they provided leadership within their non-profits. Consequently, I came to understand how their lifelong learning, specifically informal learning, had informed their leadership identity and practices. The following is a description of how leadership identity is developed and then an overview is provided of how democratic leadership practices are learned.

Leadership Identity

Unlike other professions that have well-defined certifications and career paths, Executive Directors learning fluctuates between becoming advocates for social justice concerns and excelling as organizational administrative bureaucrats. Factors such as personal experience, education, and career trajectory, as well as overarching societal considerations, may influence how Executive Directors learn various aspects of non-profit work, resulting in varied identities and practices.

Executive Directors can be defined by their ability to fulfill an administrative identity and increase organizational effectiveness, rather than contributing to the development of a robust civil society. Within the non-profit literature, professionalization is

and the use of private-

which improves efficiency and effectiveness (Marberg, Korzilius, & Kranenburg, 2019, p. 116). However, becoming an effective Executive Director may also involve working towards social justice goals, such as equitable access to housing, food, education, and healthcare. Leading a non-profit organization is more complex than simply being a strong administrator who can meet

Executive Directors need to negotiate their identity**,** to have iticality and willingness to

(Harris, 2019, p. 212). Becoming a professional means learning and demonstrating a level of standard which reflects and satisfies the concerns of multiple stakeholders (Gouthro, 2019). For Executive Directors, stakeholders include members of their communities, not just government funders or private businesses that financially support their causes. Gouthro (2019) argues:

> (M)ore intangible capabilities are also required to navigate complex workplaces impacted by globalisation, new technologies, and increasing migration and diversity. (Gouthro, 2019, p. 185)

Reynold (2019) describes becoming a professional in contemporary society as negotiating

challenged, re-examined, and reconstructed from various perspectives (p.160). Learning to

become an Executive Director requires more than a checklist of knowledge, skills and abilities to meet the administrative requirements.

Many non-profit Executive Directors align their personal values with their mission, to build a stronger civil society, and they believe they were hired for a combination of leadership skills and specific subject area or sector knowledge to do this work (Global Scan Incorporated, 2012; MacIssac, Park, & Toupin, 2013b). Executive Directors often cite their lack of technical skills such as financial, fundraising, risk management, strategic leadership, partnership development, outcome measures, data management, and change management needed to meet administrative demands (Global Scan Incorporated, 2012; MacIssac, Park, & Toupin, 2013; Cave, 2020; HR Council for the Non-profit Sector, 2011). Identity work can be seen as the

. Executive Director leadership identity may reflect their internal desire to be active citizens while meeting the external administrative demands of leading an organization.

Wiles (2013) suggests professional identity development is where individuals come to understand themselves as professionals by assuming certain traits or values. Social workers**,** for example, create a personal definition of what it means to be a social worker as well as conforming to and implementing social work values into practice when developing their professional identity. As social workers take on additional roles and responsibilities, their identities are constructed to establish themselves more centrally in the profession (Wiles, 2013). Similarly, Executive Directors may personally define what constitutes good non-profit leadership based on their lived experience.

The non-profit literature often reflects neoliberal values when describing effective leadership and Executive Director professional identity. Leadership may be seen as individuals who can work independently, be competitive, provide motivation and direction, and withstand criticism and opposition. Regan (2016) suggests that how Executive Directors develop their leadership identity is uncertain and argues that this lack of understanding may contribute to burnout, turnover, or refusal by staff to be promoted. Negative outcomes can be avoided when leadership identity formation includes managing contesting personal and organizational values, negotiating a sense of belonging with clients and frontline workers,

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increased his professionalization, he suggests further research is needed to better understand how non-profi

(King, 2017, p. 256). This study explores how informal learning about leadership in the non-profit sector may influence Executive Directors to adopt or resist

ions in ways that will bring about social change.

Sherlock and Nathan (2007) considers how non-profit CEO) learning is impacted by their relationship with staff. Due to perceived power imbalances, CEOs learned not to have frank, genuine dialogues with their staff and be more deliberate in their conversations. CEOs felt isolated in their learning as they were often told what they wanted to hear. As well, CEOs reported that their most significant learning involved navigating politics with the Board of Directors to avoid termination. Personal reflection and executive coaches were often used to facilitate learning rather than participating in open dialogue within the organization.

The above examples illustrate the neoliberal influences on Executive Directors negotiating leadership identity and learning to be professional. These studies suggest that learning to lead can require one to make objective decisions, prioritize administrative duties, and abandon idealistic thinking. However, the literature in adult education and the non-profit sector reveals that Executive Directors may also be encouraged to learn to lead democratically.

Leading Democratically

How Executive Directors practice leadership in their communities may be a reflection of informal learning rather than strictly through formal learning. Practicing democratic leadership encourages active citizenship by understanding community members and their needs as while finding opportunities for non-profit engagement. Gouthro (2012) proposes learning that occurs

foster the communicative capacities required by citizens to ensure more robust and vibrant democracies (p.58). Democratic practices may be present and reflect learning within the context of Executive Director leadership within non-profit organizations.

Leading democratically includes practices such as communicating liberally, understanding oppression, advocating, working collaboratively and empowering others in and outside of the organization. Leaders and the community will share information and support collaboration with each other in support of effective advocacy (Tenuto, 2014; Brookfield, 2010). Advocating includes performing duties outside of job requirements and adjusting rules to help others in unique circumstances. Relationships are built by having honest conversations, showing integrity and respect, caring unconditionally, being an effective listener, keeping confidentiality, and resolving conflicts respectfully (Wasonga, 2009).
model describes leaders as sharing a higher purpose, creating a caring culture and encouraging everyone in the community to take on and share leadership work.

hierarchical, complex and cross-cutting, internalized, and manifested in a web of systems known often as - (Chunoo, Beatty, & Gruver, 2019, p. 88). Confronting and moving past biases and preconceptions due to socialization creates for others to participate in (p 91). Leaders demonstrate communication, networking and collaborative skills to recognize diverse perspectives and needs (Wasonga, 2009). Democratic leaders also empower others and
energies and are willing to take a chance with shared, interdependent models of community (Brookfield, 2010, p. 10).

Feminist adult educators see democratic leadership as being collaborative and critically

relational approaches to guiding one another in community, organizations and society (Clover, Etmanski, & Reimer, 2017, p. 21). Collaborative leadership reflects values of mindfulness, compassion, consultation and helping others. Feminist leaders encourage people to enlighten others on problematic issues and work towards resolutions.

Democratic practices also acknowledge the power imbalances that come with leadership. Brookfield suggests that democratic leaders need to justify orgnizational hierarchies as they can dissuades divergent opinions (Brookfield, 2010). Leaders also have power in their decision making and managing resources. Excercising control can be seen as a democratic practice when

are

in mind (Wasonga, 2009, p. 218). Shared decision making links diverse ideas and interests, allowing additional information to be considered so that decisions can be modified to be more equitable (Wasonga, 2009).

Executive Directors may informally learn democratic practices when communication brings an awareness and acknowledgement of oppression and non-profit sector cultural expectations. However informal learning also occurs within a neoliberal context. As Ramdeholl (2019) describes:

> We live in this neoliberalized climate where everyone and everything is up for sale with market values attached to their very existence. Neoliberalism defines our relationships with one another and exists on the shoulders of genocidal violence, colonialism, and racism. (p143)

Dominant, white, neoliberal culture can overshadow democratic practices leading to justifying -making becomes accepted as a (Brookfield, 2020, p. 10). Working in the non-profit sector does not necessarily encourage democratic practices or automatically lead to social transformation. Regular reflection is required by Executive Directors to understand the impact of oppression on their practice. Leaders in the non-profit sector must reflect upon the importance of having empathy, consider aspects of moral righteousness, and assess how motives may be shaped by self interest (Goodman, 2001). Strong civil society connections may encourage Executive Directors to critically reflect on actions and decisions rather than reinforcing the status quo. Critical reflection is a social learning process that encourages us to question our actions when others are we are unable to see. (Brookfield, 2005, p. 199).

Learning democratic practices is essential for non-profit sector leaders working towards social justice. Executive Directors, often the face of the organization, tremendously influence the non-profit organization contribution to building a strong civil society, while being tasked to become effective organizational administrators. They also moral decisions that requires them to engage in critical reflection and think deeply about how the (Hansman, 2020, p. 10). Without a reason to reflect, Individuals may avoid reflection to escape feeling guilty or defensive.

Social justice learning and action is more likely to occur in spaces that are being led democratically. Brookfield defines:

> Democracy (can be) educational in that people are able to make decisions based on full knowledge of the situations in which they find themselves, full awareness of the range of

> different possible courses of action, and the best information about the potential consequences of their decisions. (p. 5)

Just as an Executive Directors practices are influenced when becoming administrators, their practices may become more democratic when they perceive that their role as leaders of non-profit organizations involves being active citizens within civil society.

Executive Directors commitment to communicate with the community is central to learning democratic practices. As a keystone of civil society, Executive Directors of non-profits are privy to conversations that reveal experiences with systemic barriers. This provides insights into possible societal changes that the organization needs to advocate. This informal learning may help develop more democratic approaches to leadership.

Chapter 3: Methodology

This methodology chapter begins with an overview of the methodological approach used in this research study, looks at the rationale for choosing to use a qualitative research method, and then focuses on the benefits and challenges of using a life history approach. It then describes my position as a researcher and ethical considerations that needed to be addressed. Details on how participants were recruited, questions were framed, data was collected and analyzed are then provided. This section concludes with a description of how the findings and narratives were written.

Qualitative Research

To explore the methodological approach for this research study I draw on my understanding as an Executive Director insider and use first-person voice. Executive Directors often have unique learning paths that shapes their leadership identities and practices. A qualitative approach was used to search for hidden meanings, non-obvious features, multiple interpretations, implied connotations, unheard voices to better understand this phenomenon (Have, 2004, p. 5) This qualitative research study involved eight Executive Directors from small to medium sized non-profit organizations who had learned multiple roles and had diverse experiences that impacted how they learned leadership.

Approaching this research, I self consciously draw upon (my) own experience as a resource in such inquiries reflectively and historically, as well as biographically (Denzin & Lincoln, 2011). I wondered how Executive Directors came to identify as leaders and develop practices to serve their communities while meeting administrative expectations. Using a qualitative approach allowed me to further explore the complex10iointracgins

expressed in daily life and by the meaning that participants themselves attribute to the interactions (Marshall & Rossman, 2016, p. 2). Who did they meet, what impact did others have on their learning, and how were their practices and identity shaped as a leader?

Rather than using surveys or questionnaires, qualitative interviews revealed the complexity and nuances of how Executive Directors interpret their world and their non-profit sector role (Lawler, 2002). Quantitative tools represent:

> A positivist orientation (that)
> stable, and measurable rather than being socially constructed where there is multiple realities or interpretations of single events. (Merriam & Tisdell, 2016, p. 9)

By using a qualitative approach, I was able to c family upbringings, educational backgrounds, and career trajectories, to develop a deeper understanding of how they experienced learning about leadership. These personal narratives brought meaning to how their identities were constructed and insights on how they made sense of their world (Lawler, 2002).

Using a qualitative approach helps provide insight to leadership development within the unique context of the non-profit sector. Karin (2015) describes some of the benefits of qualitative research:

> Qualitative leadership studies, when conducted with the same degree of rigor and concern for validity and quality, have several distinct advantages over quantitative approaches by offering more opportunities to explore leadership phenomena in significant depth, to do

p.5)

Within qualitative research there are many different approaches that can be used by researchers to collect data. In the next section I explain why a life history/biographical approach was used to interview the Executive Directors.

Life History

As a qualitative method, life history takes the epistemological view that the research

(Cole & Knowles, 2001, p. 10). This method appreciates the Executive Directors autonomy in choosing their learning paths rather than focusing on common, unified experiences.

A life history approach captured not only helped them understand social injustice but shaped story is at the centre of the research to One or just a few participants stories are used to develop a better understanding of how historical or societal contexts influence individual processes and decision making. Life stories include information that participants want to share about their lives (Atkinson, 1998), and are told as honestly as possible through guided questions (Alheit, 2005; Mason, 2001). The information collected may not replicate actual actions or events but represents the significances of their decisions (Alheit, 2005) archetypal stories derived from wider social forces and the personal characterizations the life

(Goodson, 2013, p. 31). The data is therefore comprised of highly personal information and influenced by the memory, context of the events and societal expectations.

Critics of life history may then question the validity and reliability of the data collected through lived experiences. Burch (1996) states that differences in culture, individual researchers, ning, gender and age**,** all influence the reliability of oral history. While acknowledging these factors, participants were not questioned to verify if they were telling the truth or seeking information to confirm other viewpoints.

In educational research, life history may give voice to individual learning experiences to better understand the factors that impact learning trajectories. Alheit (2005) argues that adult educators using a life history approach can acknowledge that individual influence not only their learning trajectories but also may impact more broadly on society. Participants may also better understand what motivates their behaviours by sharing their stories during the research process (Gouthro, 2014). By using an emancipatory framework, this approach enabled me to learn how larger societal and cultural factors shape lives. Therefore, interpreting a life history approach using a critical theoretical lens creates better understanding of existing societal barriers or dominating forces that influenced Executive their identities and practices.

Research Positionality

As a previous Executive Director, I identify with this role and consider myself an insider. I have observed that Boards of Directors are increasingly valuing administrative skills resulting in more people being hired from outside the non-profit sector. Often this is without consideration of how socialization shapes our understanding of leadership. Like myself, I imagined other non-profit leaders have come to know social justice from their childhood experiences and was strengthened through their work serving others. Unlike the technical skills I learned once I

became an Executive Director, my leadership identity and practices were shaped through these experiences and could not be replicated through books and workshops. Through this research I hope to bring greater understanding of how leadership identity and practices are shaped through lifelong learning.

I approached this study with special considerations due to the Covid 19 pandemic. Even in less chaotic times, Executive Directors have limited time to engage in any activities that do not directly benefit the people they serve. Executive Directors may be experiencing compassion fatigue, anxiousness about the future and escalating pre-existing tensions between Board and staff. I understood Executive Directors would be experiencing incredible pressure and stress while adjusting their services to stay viable.

Some organizations would be finding the pandemic more challenging than others. I used my network (personal and social media) to find Executive Directors who would not be burdened to participate. I could understand their work context and the importance of Board of Directors and funders relationships

recruiting board members with specific business skills) are familiar to me and required no further inqui

more subjective. I was conscious not to exploit my power over how their stories would be presented. For example, I only shared parts of their stories about their Board/Executive Director relationships which were relevant to their learning rather than opportunities to vent frustrations.

Conversations came easy and felt familiar as I related to many of the experiences that were shared with me. After each interview I found myself reflecting on my experiences and recording my thoughts in a journal. How was my experience similar or different? Am I assuming I understand their words based on my own experience? Should I ask more clarifying questions to

avoid assumptions, or will this seem odd to the participant who knows I have practiced in the sector? I was mindful of my identity as an experienced non-profit professional yet

down the identity of an individual and the organization that they work for through the details provided in the discussion in my thesis or through other publications or presentations of this research.

Recruitment

A purposive and snowball sampling approach (non-probability sampling) was used to seek out participants. Non-probability sampling ensures that chosen participants have direct experience and exhibit typical traits of people within that group to address the issues being researched (Saumure & Given, 2008). The non-profit sector encompasses diverse organizations in terms of operational budgets, number of staffs, social mission focus, charity status, and funding opportunities. Non-profit, charity, non-governmental organization (NGO) and social enterprise are terms used in contrast to the public sector or private enterprise making it necessary to narrow the scope of who to include.

This research focused on small to medium sized social justice non-profit Executive Directors as these leaders may have the most agency on their learning as well as less administrative demands than larger non-profits. They also may be overlooked as making a lesser impact on society, be subjected to more criticism due to lack of formality and/or not enjoy the same accolades as larger organizations. Using a life history approach provided an opportunity to acknowledge the commitment and perseverance.

Executive Directors had a minimum of three years of experience to ensure they had obtained a certain level of competency and comfort in their role. As well, these Executive Directors may have reflected more on their learning than those new to the profession. Due to the Covid 19 pandemic and lack of interest in the study, recruitment efforts included retired

Executive Directors. A purposive sample led to including participants who represented a variety of different issues (such as food insecurity, literacy, and youth issues) that represent social justice interests rather than sports organizations, secondary education, hospitals, foundations, or industry organizations.

An online search of non-profit organizations in Nova Scotia was used to create a list of Executive Directors with less than ten full time employees and/or whose operational budget was less than $800,000. The list was categorized into various areas of interest (illiteracy, child and youth, homelessness, etc.) as well as Executive Directors with three or more years of experience and condensed to those who qualify for the study.

The Nova Scotia Community Sector Council and adult educators working in the non-profit sectors were informed of the research by email. These connections further communicated the need for participants and provided contact information for those they thought may be interested. Information about the research study was posted on social media accounts.

Executive Directors were asked to refer others in their network who would like to participate. Participants were under no obligation to refer anyone and did not experience a penalty for not referring. Participants knew that any referrals would be told the source**,** which

participants had to indicate consent to this as described in the information letter by checking a

to those participants I have

before they were contacted by me.

Recruitment began in Nova Scotia and included reaching out to organizations outside of this province to obtain a diverse sample. Eight participants were interviewed from the Atlantic

provinces and Ontario, Canada. Due to the social distancing practice during the COVID-19 pandemic, all interviews (except for one that had been completed prior to lock downs) were conducted over the telephone or Skype**,** which made location less of a criterion.

Each participant was provided with an information letter that contained general information about the research, participant selection criteria, information on informed consent and my contact information (Appendix A). Executive Directors could then decide if they were right for the research and determine if participation was beneficial. Questions or concerns were addressed in follow-up communication if needed. The Executive Director then used the phone or email to confirm participation. Once interviews were arranged, participants then scanned the signed consent form which was also reviewed orally before beginning the interview.

Framing research questions

Epistemologically, using a life history approach enabled myself and the participants to collaboratively contribute to the creating of knowledge (Leavy, 2011). However, how questions are posed to participants can impact the way stories are told (Shopes, 2011). Questions were asked so as not to unintentionally create an imbalance in this relationship and consequently misrepresent the

from a Habermasian perspective, in terms of learning in the system the types of learning needed to address business functions in their managerial role, as well as learning that occurred in lifeworld to fulfil the mission aspects of a leadership role in a non-profit organization.

To conduct life history research, I strived to build a positive, open relationship with the participants. Rather than concentrating solely on logistical issues, a preliminary meeting provided an opportunity to build rapport and intimacy before the research began (Leavy, 2011).

This rapport was built with participants by providing thorough information about the research study**,** as well as encouraging participants to ask questions and state concerns. I provided a short summary about my own non-profit work experience for 17 years and 10 years as an Executive Director to demonstrate my own business-related learning as well as my informal value-laden learning and to encourage participants to share both of these types of responses. Internet searches

tarting the interview.

both heard during the life history research. In qualitative research, the first initial research questions may be guarded and inquisitive but still allow the researcher to convey the meaning of the study (Agee, 2009) -ended, highly unstructured series of interviews that the researcher and participant engage in a process whereby these experiences are unearthed, reflected on, interlinked, and knowledge is (Leavy, 2011, p. 11). I used questions that were not too specific but accurately expressed my purpose in hopes of creating a trusting, mutual relationship to discuss neoliberal effects as well as co-constructed communicative action leading to knowledge, such as,

had expected or wanted to learn i

The questions, included in interview schedule (Appendix B), were designed to seek an

ning that attributed to their understanding of mission by inquiring on their childhood/youth, school experiences and career trajectories into the non-profit sector. Questions five to nine inquired about learning technical and administrative skills to

complete business functions. This included asking about influences that led to learning new skills, the role of Board of Directors and the significance of these factors to their success. Questions ten to twelve asked Executive Directors about the impact of the learning as well as understanding what was meaningful to them. The questions were relatively open to allow the Executive Directors to discuss life events that were particularly crucial to them.

Based on their answers, I then asked follow up questions to give insight on a critical theoretical framework and achieved the focus needed during data collection (Agee, 2009). As the interview progressed, questions were asked to elicit responses that encourage the participant to tell their story while revealing the truth behind power structures to inform the critical analysis.

(Goodson, 2013, p. 33). I

they were attributing to societal factors that influenced their learning. The answers reflected the particip

participant to preconceived conclusions.

Data Collection

The data collection for this research study involved eight interviews using a life history approach with Executive Directors from non-profit organizations. Prior to the interviews, I

challenges by searching their organizational and Canada Revenue Agency websites. The Executive Directors were provided a copy of the open ended, semi-structured interview schedule and asked to reflect on the answers prior to the interview. Executive Directors had the option to not answer questions (see Appendix A). Originally, Executive Directors were asked to share certificates,

favorite books, or training materials to help bring context to their answers as well as recall events that have impacted their learning. However, since most of the interviews occurred online or on the phone, participants did not provide this information.

The questions were carefully articulated to be simple, straightforward, and open-ended, so as not to lead or suggest others views on the topics (Thompson, 2000). After each interview**,** I reflected on the questions to ensure that I had provided opportunity to discuss learning that attributed to performing mission and business functions. For example, after the first interview, I realized

identify with this miss

Each interview was approximately 1-1.5 hours long. Interviews were scheduled at times that were convenient for the Executive Director, especially given the additional pressures of working from home. Interviews were recorded, and recordings were downloaded to a personal computer which is password protected. The interviews were then deleted from the recording device once it had been transcribed. Transcripts were stored on a secure server space that is accessible through Mount Saint Vincent University. Interviews were reflected on immediately and points of interest were recorded in a reflective journal. Personal reflections were also recorded in a journal about the data and referred to while completing the analysis.

Participants were provided a copy of the transcripts to ensure that the transcription captured their meaning and intent. Participants were given two weeks to review transcripts (an extension deadline was given for a later, mutually acceptable date, if they requested more time), and they were allowed to add or omit content, as well as choose to withdraw from the research.

Any information that the participant did not want to include in the research was deleted from the transcripts.

Analyzing of Text

The Executive Directors articulated their stories in their own words and dominated the conversation. Strong oral history transcripts should include multiple pages featuring only the

cher (Leavy, 2011).

While specific questions were asked, the Executive Directors answered based on their own interpretation and understandings. Part of the research design included ensuring that they provided most of the text and that as a researcher I was not imposing a critical framework on their responses.

Goodson (2013) suggests manually analyzing data (rather than using computer software) to bring meaning to the great volumes of data that can be collected using a life history approach. I carefully read and applied codes to the approved transcripts (Creswell, 2013) that included single words, letters, numbers or other symbols that represented specific pieces of data to allow me to easily retrieve the information (Merriam & Tisdell, 2016). The initial codes emerged from the text itself (ex: boards, programs, grants, networks) as well as reflecting the literature on informal learning (ex: lived experience, mentors, story telling) and then were applied to the transcripts.

The analysis of the data was informed by critical theory. I applied applicable codes from the literature and increasingly, as I read more about critical Habermasian theory, saw more evidence of system type and lifew

(Marshall & Rossman, 2016, p. 218). Codes such as transformative learning, intersubjective learning, lifewor

After considering the

system and in the

lifeworld sense, I then began shaping these patterns into themes.

I read and reread the transcripts slowly while keeping a thematic notebook to keep track of the emergent themes. As my critical lens developed, I was able to see patterns and connections that revealed a deeper comprehension of the stories shared with me. The thematic notebook was referred to while reading the transcripts multiple times. Themes emerged as my understanding of critical theory deepened. I was able to appreciate profound insights from participant responses, and expand

. Themes were recorded until the point of data saturation in a notebook and revealed the most relevant aspects of the life histories (Merriam & Tisdell, 2016).

Conceptual Framework

While developing themes, I completed a literature review on critical theories to develop further knowledge to strengthen the analysis (Warren, 1982). Producing a narrative from a

creates a methodological challenge (Oakley, 2010). I strove to write narratives that provided

critical theory and learning connected to communicative action. Themes and theory helped

explore the types of learning that occurred to serve the system, as well as learning that occurred in the lifeworld.

Habermas describes the system as socie

learning is connected to the system because they were often in the position of having to learn technical and admini

reflective of marketplace values, and the emphasis in their role on accountability and competition. By considering the business aspects of learning, I conducted a thematic analysis that allowed themes to develop for this section (Learning for the System) through emphasizing business, regulations, competition, etc. Executive Directors are expected to engage in this type of learning because they are leaders operating within broad social/economic/political systems and therefore must navigate and work within these structures.

Habermas also suggests that learning occurs in the lifeworld where knowledge is shared within a localized community through communicative action to create common values, social norms and to address and advocate for specific needs by sharing, arguing, and negotiating ideas with one another. The lifeworld is connected to Executive
because constructed, shared knowledge is related to their understanding of non-
The type of learning that Executive Directors retain within the lifeworld is connected to informing them on how to engage with their communities. Below I discuss this kind of learning as foundational for Executive Directors to use in advocating for social change as active citizens and practicing democratically within civil society.

Writing the Findings and Narratives

I separated

Directors learned the business aspects of being a leader in the non-profit sector. The first theme,

who were working in non-profits that were experiencing financial instability and the need to learn accounting and bookkeeping skills. The next them

developed from codes where the data illustrated the learning connected to business practices that were learned and performed to achieve organizational growth. The last theme in this section,

describe the codes that are associated with how Board members

encouraged administrators to develop their skills and the importance of technical skills

I used Regmi (2017) interpretation of learning in the lifeworld, based on Habermasian theory, to organize the s

transformative, intersubjective and active citizenship learning. These categories reflect learning in the lifeworld because they focus on learning in community in everyday contexts, where meaning is shared, negotiated, and evolves in response to localized needs and interests.

occurred from experiences that resulted in questioning worldviews, developing a new

will be included (both from the data and the literature review), and decide the appropriate balance of voices (Leavy, 2011). I generously used direct quotations to carefully compare interpretations and theory building (Merrill & West, 2009). As well, quotes from the transcripts were used to help readers understand and rationalize my interpretations and reduce perceptions of bias (Leavy, 2011). Accordingly, direct quotes were used to clearly represent the Executive

This thesis was informed by the stories of eight Executive Directors who work in social justice orientated non-profits. Hannah led a poverty reduction non-profit who helped people find housing and food security. Jason, with over twenty years experience, also leads a poverty reduction non-profit that focuses on housing initiatives. Sarah is a relatively new Executive Director who started a non-profit that addresses mental illness after recovering from her own mental illness. Tanya is the founder of a non-profit that helps those with varying abilities secure employment. Joanne leads a feminist non-profit that advocates for equity in economic development opportunities for women. Evan, a white man, led a youth non-profit in an urban Black community. Rachel, a white woman, leads an Indigenous youth non-profit to help young people navigate educational and career goals. Andrea leads a non-profit that helps adults build literacy skills and pursue further education. These voices share their understanding of learning to become a leader that fulfills their social missions while meeting administrative expectations as an Executive Director of a non-profit.

Chapter 4: Findings

Using a thematic analysis, the findings are presented in two secth(gs)] TJETQq0.00000912 0 612 792 reV

rning from the Lifeworld considers how

how learning through communication with family and community impacted their leadership identity and practices. Each life history is then written as whole narratives to gain a better understanding of how their learning in the lifeworld was unique and led to personal insights of effective leadership identity and practices as active citizens within civil society. These descriptions of the t duplicate real actions or events that

told (Alheit, 2005). Executive Directors life experiences were shared in a narrative style using Regmi (2017 based on a Habermasian analysis: transformative learning, intersubjective learning and citizenship learning.

Learning for the System

I begin this section by providing insights that the Executive Directors shared about learning to become leaders of their organizations as effective administrators. This is articulated under three main themes**,** demonstrating how Executive Directors are socialized through their conversations within the non-profit sector to serve the system. The first theme is about Executive Directors learning to secure funding and how this often leads to becoming competitive. The second theme discusses how once Executive Directors are orientated into the non-profit sector, they continued to hear messages that support their need to develop administrative skills to lead effectively. The final theme considers the role that Board of Directors have in augmenting their socialization to become effective administrative leaders by performing a governance role and mentoring Executive Directors in technical skills.

Securing and Competing for Funding

Executive Directors were often met and overwhelmed with systemic demands upon entering the non-profit sector. Administrative demands, such as reporting on program outcomes, managing financial challenges, dealing with staffing issues, and reporting to funders often took priority over understanding the community and its members through programs or service delivery. Evan describes these challenges:

> So I get this job and I knew nothing about running an organization. I had never done anything budgets, donor relations, managing staff, any of that stuff. I thought about what I have to

This orientation into the non-profit sector affirms that learning needs to focus on becoming effective administrators that can manage these organizational issues. Informally learning was a common experience as the Executive Directors often did not have the required business skills when first coming into the position.

Funders can consider non-profits who operate in a more business-like fashion to be more reliable and credible**,** leading to Executive Directors developing a more competitive approach. Sarah pull(ing herself as (which) ntil the government creates a way that

She explains how this can increase the demands on her:

> So I am not only trying to be really good at what I do and learn fast and be smart enough

> am the girl who goes up to the pool table never having played pool and is mad that she is not sinking them like Minnesota Fats. That is my mentality. I am so competitive.

Such influences can encourage competition for funding rather than collaboration to find solutions to societal issues.

non-profits

understand how to maximize funding to offer the best programs and services. Jason acknowledges how being competitive is part of being an effective leader**,** even when it is not in accordance with the non-profit sector. He recognizes himself:

> (I am)
> be the best organization in providing these services. That is really important to me. What can we do to get there? What does that look like? Understanding how I evaluate those things, how they interact and then determine whether (a new program or service) is viable or not.

Serving the community means offering the best programs within their available resources. As Jason alludes, Executive Directors learn to determine if programs or services are not only viable but can be offered with the person receiving a high-quality experience within the available resources. Strong leaders do not present a wide range of sub-standard offerings but can effectively evaluate their programs and determine where resources should be allocated to serve specific aspects of

Indoctrination of Business Values

Even when organizational financial stability had been achieved, the Executive Directors were continuously encouraged to become effective administrators through dialogue within the

non-profit sector. Jason and Tanya often made comments that aligned the non-profit sector to the private sector. Jason referred to managing a non-profit as

warned, (non-government organization). You are a business. And your business is nothing less than a business. It just so happens you are in the business of helping

Experienced Executive Directors may influence novice leaders to normalize business practices throughout their careers when they use business terms to describe their work.

Joanne shared the importance of learning administrative tools in becoming an Executive

ke excel, accounting software, and CRMS (customer relationship management systems) which sounds ridiculous Joanne tells

through the first interview for most non-profits Through this communication Joanne reinforces

These tools influence how Executive Directors communicate program outcomes to funders by concentrating on quantitative data. Executive Directors learned that providing funders with statistical evidence furthered the perception of effective leadership as this encouraged increased

advocate for the people he serves through data. He describes himself:

> (I am) a big stats person. I need data. What are we measuring? How do we know if we are doing a good job? How do we know if we are making an impact? We have contracts with our region to provide services, so I wondered how do I know that we are doing a good job? I worked with staff to develop the outcome measures. Those kinds of conversations really get you to understand your programming.

When Jason focuses the conversation with his staff on statistics**,** his understanding of the programs and people is limited to what has been measured.

In addition to funders, governing operational standards (or best practices) for the sector and other Executive Directors further encourage leaders to primarily focus their work priorities as administrators. Jason believes that the reason he was hired to be the Executive Director is not

His Board of Directors had valued this administrative

lived experience.

As an Executive Director, having lived experience in the social cause can be perceived as unreliable and not contribute to effective leadership. For example, even though her organizatio mission is to support people with mental health issues**,** when Sarah disclosed her own experiences she go oh really, are you trustworthy then? Are you really ok? Suddenly the respect factor may not be there as much To be perceived as an effective leader and increase her credibility, she began accumulating and collecting more data on the program outcomes. She proudly shares:

> (Soon) we will have live data dashboa
>
> see a full
>
> really talk about how great programing is and how it is benefiting people by showing numbers they will understand. If I could give myself advice two years ago, I would say up the amount of data collection even though it was always a focus. (I)nstead of relying on our opinions and thinking everything is going well really you just never know. We need that data to inform our next steps.

Sarah maps this data, along with information from their website and social media, against their strategic plan to understand how they are doing and what else needs to be done.

Rachel has learned to become a more effective leader by implementing technology to multitask administrative duties. She acknowledges the impact on her work:

> communication tool we were super early on that. Even being able to work remotely
>
> always willing to try new things. I (normally) travel a ton (so) you have to be ready to be as effective as you can be when you work that way. We work to the job, not to the clock and that combination of things just allows you to get the work done.

When Executive Directors learn to use technology, they are perceived as being more effective leaders with in the neoliberal culture expectations of working harder, longer, and more efficiently.

Executive Directors learn that effective leaders create qualified staff teams to be responsible for direct program and service delivery so they can focus more on administrative duties. Some participants found that they were encouraged to learn skills to increase funding to offer competitive compensation to attract new staff**,** rather than mentoring and developing staff from within.

get a good staff you are not going to be competitive unless you know what you need and what

had to n only spend

so much time yourself (in I definitely realized I had to create more money to attract

Learning to balance the market with funders expectation that financial resources are used primarily for program and service delivery may lead to developing other strategies as an effective administrator. Joanne (while) provide an annual increase (because they exceed the amount an hourly wage that funders would fund) there are still lots of ways that people can be compensated and really looking at that has learned how to provide other benefits that appeal to her female staff who are balancing multiple roles (mother, wife, and employee) such as flexible hours, working from home and health benefits to stay competitive.

Executive Directors are recognized as effective administrative leaders when they learn how to establish systems and processes. Andrea shared sses in place, putting She learned this from an entrepreneur who was starting a consulting business and volunteered to help her. She explains this process:

> n a learner walks in the door or anybody walks in the door- what do they do, what does each position do and what tools or resources do they need to ut the whole thing from one end of the wall to the other we have been working on this for a year or two to document it all.

Funders indicate increased trust in Executive Director**s** who demonstrate that funding is being used efficiently and can be accounted for through well articulated standards and processes. Through grant applications**,** Executive Directors learn that funders not only want quantifiable outcomes but evidence of strong systemic processes. Evan learned that

Jason and Sarah emphasized that as administrators they are responsible for such management practices, such as developing good business plans, strategic plans, and policies to be effective leaders efing up policy work protects Sarah echoes:

> Executive directors need to have those pieces (a business plan and a strategic plan) in place and create the vision, social mission, policies, and a board manual. You can find components, and they really do shape an organization by building credibility (and are) great communication tools.

Sarah has learned that meeting these requirements can be achieved by using templates and checklists and making minor adjustments to reflect her specific context.

Organizations that support the non-profit sector can further reinforce the importance of administrative practices through workshops. Andrea recalls learning the magnitude of budgeting:

> (A)fter the two years, I attended a Board Governance workshop. I was really not prepared an annual budget for the Board even though that was something they should have been asking for. We were balancing every year so that was really where that was at.

More sophisticated non-profits, such as those with national focus, develop operating standards for the non-profit sector that reinforce the administrator role and provide core practices that attempt to regulate the whole non-profit sector. Jason associates learning and implementing

such standards as being critical to becoming an effective leader. He reiterates many times during the interview the importance of following standards:

> (I)
>
> even with (my old organization), when I would go to agencies (as part of the
>
> now. If they had stayed on the path with National Standards, they would probably still be open.

Experiencing financial challenges and business language within the sector reinforces that becoming an administrator is important in practicing effective leadership. Communication within the non-profit sector can further encourage Executive Directors to take on an administrator identity by reinforcing that Board members should be providing governance and ensuring administrative requirements are being met.

Role of Board Members

The Executive Directors learned to encourage their Boards to take on a governance role that focuses on policy and strategy to ensure the non-profit is progressive and competitive. When

d

since implementing this learning:

-to-day things.

> have done a ton in a very short period of time. We have had some really great breakthroughs and have done a lot. Now we really need to focus on getting our policies in

> place. We already had policies in place before, but we need even more policies to reflect our growth and development for where (the organization) is right now.

When boards take on a governance role, non-profits are more likely to grow, which then increases the need for Executive Directors to learn administrative tasks and associated practices**,** like writing more substantial policies. Evan describes how his governance board helped him become a stronger administrator by improving his understanding of the required policies needed to increase safety and reduce risk. He reflects on the impact:

> All they wanted to do was come together once a month, figure out what their plan was, and they would go away and do it. That really drove my learning as well because people would drive me to go get this stuff in place.

Board members can make effective mentors in helping develop policies. They can reinforce the importance of policy, and provide instruction on how to write policies that reflect the organization**,** as well as how to enforce policy to build administrative capacity. Sarah shares:

> (A)s a young Executive Director I need some guidance, so the Board has been very know a ton about policy, especially the governance policy. I am really learning a lot about that.

Boards that are primarily focused on governance ensure that Executive Directors learn to take a strategic focus and not become overwhelmed with day-to-day problems.

Boards can encourage learning that will lead to organizational growth that is outside of the comfort. Jason notes that:

> (The Board members) are not your friends. They have to push me as much as anybody. We are not doing anybody any favours by having people that are just not pushing you as an Executive Director.

Now in the latter part of his non-profit career, he reflects on how he lacked the

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profit sector.

sed to think

> asking for information was a sign of weakness. I treated it like that. I tried to pretend that I knew everything. When I asked questions, I saw it as a weakness.

Although reading, research and attending workshops were mentioned, the Executive Directors sought board mentors that encouraged questions and discussion as a valuable way to learn administrative practices like accounting

scary, just something that I need to know quickly, online and research probably I would do that.... anywhere where I was weak, I would definitely seek advice, guidance, support or

from the previous Executive Director . She recalls:

> (E)very Saturday we would meet at the office, and she would help me with anything I
>
> budgets. One of the first things I had to do was write a (large) proposal. (An) important skill you need to know being the Executive Director of (a feminist organization) is

> knowing how to write good grants for women and gender equality because those projects are usually $3000 to 500,000 investments. We would work on that.

Treasurers acted as mentors to teach accounting practices and often helped to mediate the tension of having to learn technical skills outside of their comfort. Andrea, Evan, and Joanne actively recruited Treasurers who practiced in the private sector and had specific qualities that helped them develop administrative capabilities. Andrea explained how her

- the day-to-

Evan recalls being overwhelmed when funders said, if you

serious changes very quickly you are out non-profit was not doing financially well. He recruited Treasurers who acknowledged that each of them brought different strengths and they could learn from each other. He describes the quality of their communication:

> I had the most amazing Treasurers every single one of them recruited were all brilliant and they would bring their expertise. Our relationship was based on mutual respect and
>
> never had that degree of expertise or even have the interest to have that degree of expertise.

Jason noted

Directors knowledge on how to best manage the funding and ensure sustainability.

Executive Directors learn that to become an effective non-profit leader one needs to compete effectively for funding, staffing, and reputation. This is best accomplished by

implementing administrative practices which are often learned informally through conversations and supportive mentorship.

Learning from the Lifeworld

Executive Directors find themselves leading in a sector that is fraught with concern for its financial sustainability. This requires one to see themselves as a leader who can navigate the difficulties of the market and within political tensions. Despite these heavy influences, Executive Directors do learn that adopting an entirely administrator identity may not necessarily lead to effective leadership. Their leadership thus reflects not only the importance of learning administrative or technical skills to serve the system but encompasses lifelong learning from the lifeworld. This learning is unique and results in each Executive Director developing their own leadership identity and practice that helps guide them as leaders who advocate for social justice**,** thus fostering a stronger civil society sector.

For this reason, writing on how Executive Directors learn to lead from a social justice perspective is not easily done through shared themes. Learning to become an administrator is riddled with common themes of lack of funding and competing for resources, being recognized as effective in the sector by becoming business like and having board relationships that supports financial acumen and strategic thinking.

provides a uniquely socially constructed understanding of how they identify and practice as a non-profit leader. Once asked to reflect on learning that has occurred throughout their life, each Executive Director described their own distinctive learning journey based on conversations and interactions with family, friends, colleagues, and community that influenced how they realized leadership.

To provide some structure to these distinctive relationships and events, I have gathered the themes of transformative, intersubjective, and citizenship lifelong learning. Using Habermasian theory, Regmi (2017) applies these dimensions of learning to describe how people learn through communicative actions that reinforce and build new knowledge leading to the cultural reproduction of the lifeworld. Regmi argues that including this understanding of lifelong learning will lead to a comprehensive learning framework which currently is primarily focused within an economic model. By focusing on learning from the lifeworld, I explore how their motivation and decisions developed through individual narratives.

Transformative Learning

Transformative learning was first theorized by Jack Mezirow (Mezirow, 1978, 1981, 1995, 1997) who believes through reflection we try to justify beliefs by examining our ideas when we experience something that does not support them or when we are conversing with others who have differing opinions. Learning occurs when what we know is not supported by what we are experiencing or hearing thus challenging us to rethink our understanding. This new understanding then influences how we perceive and act that is remarkably different from what we had known in the past. Transformative learning ensues when one experiences an unexpected event (what Mezirow refers to as a disorientating dilemma), questions the meaning of this event through reflection and conversing with others, and then changes one thinking or acting.

Both Sarah and Jason experienced transformative learning that has shaped their understanding of being a leader in the non-profit sector and consequently how they lead. While Sara knew she wanted a career that would help others, it was not until she experienced a severe mental illness that she saw herself as a potential leader in this cause. Jason often does not feel

comfortable working directly with vulnerable people and initially struggled to understand how he could make a difference until he met people who were using their leadership skills to help others. I provide examples of both personal and career-based learning that has occurred throughout their lives to provide a deeper understanding why these particular experiences were transformative in informing their leadership identity and practice.

SARAH

Sarah was raised in a family that using your own privilege, knowledge and skills to help is really important of her parents worked as medical professionals and often volunteered in their community. Her father is spiritual and instilled the value of giving back to others. She recalls how her mother intentionally introduced altruistic values at an early age:

> One of my earliest memories as a child is my mother handing me a Jane Goodall book as an example of someone who had really been able to follow their passion to help others by putting out their energy into the world.

Sarah wanted to find a career she was

find my own she chose not to pursue medicine. She describes her rationale to study economics:

so I could understand how

ow the system can be

effective in taking care of people. During her studies, she had a personal experience that challenged this understanding. She describes how this impacted her sense of purpose:

> I developed a [mental health disorder] when I was younger in my teens. I had it for many years. It was very severe and had interrupted my schooling which is partly why my schooling was so negative. It really changed my life dramatically... I personally experienced that the system is broken and how devastating that experience was for me. This was something where I can use my energy and I can use my skills. The more I thought about it, the more I was outraged how inadequate the system really is.

Before this experience, she was pursuing a career that was meaningful but also would provide personal financial stability. She had already invested time and money into pursuing a career in international development and then was unsure this was the right path. After graduating from university Sarah completed an internship as an economist at a non-profit. This introduced her to the non-profit sector and helped her understand how she could use her own personal experience to help others. She went on to create a non-profit to educate communities and health providers on the barriers that people experiencing mental illness face. This was a transformative moment for her:

> passionate about and that came from an unexpected place. My search was not structured. It was pretty confusing to be perfectly honest.

assumptions that the system is effective if one knows how to use it properly. However, experiencing how the system contributed to her poor mental health made her realize that there are problems with the system that need addressed. Her original plan to learn economics to help others no longer made sense to her. Rather than prioritizing personal financial wealth, she then found herself taking on a leadership role in the non-profit sector.

This early experience shaped how Sarah approaches this work. As she noted, her personal

he also described how this gives her insight for the need to break down systemic barriers:

> ting people because that is not actually addressing the problem. The problem is systemic within our communities and health providers who do not have enough knowledge and training. To only focus on the people who are struggling is doing a disservice to everyone involved. We address mental health with a holistic perspective by looking at all the different factors that influence it.

Her individual experiences help inform her understanding that mental health issues are influenced by society and the problem is not the individual. Even though Sarah is in a position of

xecutive Director (who is) more aggressive and confident Her leadership is collaborative, and she relies on not only on other professionals but includes those who are experiencing mental illness to help guide the organization. Those who experience mental illness can see how the system is broken and an inform ways to reduce barriers in the system.

JASON

mother had encouraged him to volunteer at non-profit summer day camps as a youth which led to summer jobs. Initially he considered the work which largely involved playing with children fun and while attending university considered a career in teaching. However, he learned that behaviour is complex and struggled to understand how he could make a difference when he had no control over situations that were impacting these behaviours. Jason describes this dilemma:

of their

behaviour

t picture

myself in a classroom. As much as I love kids there is always one or two kids for whatever reason I have a tough time with.

Like Sarah, Jason experienced a disorientating dilemma when he came to the end of his education and questioned its usefulness. Jason examined what he would do since he had not considered other careers and his only work experience was with children. He took on a job as a Youth Coordinator at a non-profit even though he felt unprepared for the role. He shares how mentors helped change his understanding:

(W)

non-profit

them unintentional mentors whether they meant to be a mentor to me or not. I learned a

opinion and I realized that I have something I can contribute at this level.

He began to understand that how he approached leadership can make a difference in very complex situations. He became involved in a provincial network focused on youth initiatives. Collaborating and listening to other

opportunities for children and youth to overcome their challenges helped him understand his

Jason explains how this helped him advocate for the youth:

> Working as part of (a national non-profit) I could see what other agencies were doing for their youth and the difference we would be able to make but our leadership was standing go to a leadership camp. I felt that should be an absolute no brainer. That is something we are as an organization. That frustrated me.

Eager to apply his learning and unfulfilled in his current situation, he sought an Executive Director role early in his career. After several years of practicing his leadership knowledge within the child and youth sector, he switched focus and became the Executive Director of a non-profit serving the homeless. He had felt his administrative knowledge had equipped him with the knowledge and skills to manage a larger organization. While he had learned to be an effective leader from an organizational perspective, he found his assumptions of people experiencing homelessness and poverty was inadequate. Jason expresses his feelings:

> I feel like I am drinking from a fire hose -100%. I am learning that running an organization is one thing. I can do that. But some of the issues I am not up to speed with, and I have to learn a lot very quickly.

Similar to his early experiences working with challenging children, Jason found he was apprehensive in engaging with people who are homeless, and he was unclear of how to use his leadership to make a difference. However, communicating directly with the people he serves has created disorientating dilemmas and challenged his assumptions of why people behave the way they do. This reorients his worldview (perspective transformation) to become a more effective leader to help others. He shares how his beliefs had been mistaken:

> experiencing homelessness would be too comfortable. I came here and 90% of the people
>
> and makes me work even harder. Obviously, my senses are heightened in terms of issues that are particular to the populations by working with them. Spending some time with them to get to understand them. I am getting to know them. I like to think I interact with the people who come into our building. I understand their situations firsthand which is really key.

Jason still relies mostly on his networks and mentors to help him learn how to create impact in the sector, however, his interactions with the people he serves helps him develop empathy and not be critical of individuals experiencing poverty. He sees his role as more than managing an organization but impacting larger societal issues:

> Our role in this community is to provide as many services as we can under one roof to
>
> put food on their table. That really bothers me. I am pretty passionate about that. And everyone has the right to be housed Outside of work I certainly try to ensure that I represent those views when I am having conversations with people outside of the non-profit sector.

Although uncomfortable, Jason learns from the people he serves, and his non-profit network and support from mentors has shaped his leadership identity and practices. He has learned democratic approaches (frontline) staff the autonomy to make changes and improvements niz(ing) leadership potential... (and being) a big believer of

collaboration Rather than seeing leadership as being limited to leading an organization effectively, he has come to understand that leadership can be used to address larger societal issues when addressed collectively, thus engaging in civil society.

Intersubjective Learning

Intersubjective learning occurs when we engage in conversations that can challenge or reaffirm our thoughts rather than relying on information that is communicated through media and technical means (Regmi, 2017). Executive Directors learn non-profit cultural norms and values through conversations. Executive Directors often develop a shared understanding which can be understood as intersubjective learning. This learning represents a

(Regmi, 2017, p. 691). These conversations contribute to learning how to critically reflect on leadership practices within the non-profit sector.

The following Executive Director stories illustrates how knowledge helps them pause and consider whether the administrative solutions presented to them makes sense.
demonstrates how she relied on conversations within her non-profit network to help her understand if her non-profit should turn into a social enterprise. Joanna established a board that recognised and encouraged feminist practices to understand how to become a feminist leader. Tanya regularly communicates with staff and Board members who share their perspectives to balance her competitive nature with the non-profit Earlier life events are first described as they provided foundational knowledge used by the Executive Directors to reflect on their non-profit work experiences.

HANNA

Hannah grew up in a close-knit family that was active in volunteering and shaped her values and beliefs. She describes her family:

> My values stem from my family upbringing which instilled in me that you help others and volunteer. My values are that family is first, give kindness and care for

> involved in the helping profession. Not once did I think about going into business or sciences. It was always about helping others.

After graduating with a home economics degree, Hannah started working frontline in non-profits that helped support families through workshops and programs. She found herself

y that had a

Throughout her early days working in the non-profit sector, during numerous workshops and network events, she found herself amongst colleagues with similar passions to help others. She describes how these relationships impact her learning about leadership:

> The United Way would offer workshops and opportunities to meet with other like-minded organizations. A lot of my learning came from just being involved with other

> expertise and knowledge and experiences were far greater than finding something online.

> Network events and conferences helped connect her to experienced Executive Directors

When she had the opportunity to be an Executive Director of a poverty

reduction organization, Hannah had a strong understanding of how she should lead. She conveys how she believes her leadership differs:

> There were countless times where I and a volunteer with a truck would move the furniture. That is not a typical role of an Executive Director, but it was needed and it was so appreciated. Some of the people had absolutely nothing in an apartment and then we would leave having helped furnish it. That was serving to help the poor.

Hannah references a programming is not in line with the administrative expectations. As an Executive Director, she implemented several programs to reduce poverty based on what she learned earlier in her non-profit career**,** which encouraged her to talk directly with people in the community to understand their needs.

However, her Board of Directors did not see this hands-on approach as demonstrating effective leadership and wanted her to take on more of an administrator role. Different ideas of how an Executive Director should identify and practice as a leader created tensions within their relationship. She explains:

> I was there for about 3-4 years, and I was focused on the work such as making partnerships with other organizations to help people living in poverty. My Board of Directors, at the time, wanted the organization to focus on being a (social enterprise) rather than having a large (community) outreach component. What the Board saw as the mission and what I saw as the mission became very different which led to a lot of tension and stress. I am not a fit for the job if something goes against my grain of my values and beliefs.

This discrepancy led her to discuss this situation with other non-profit leaders to validate her values and priorities. She used her network to better understand her own experiences with her Board of Directors and determine if her values reflected her understanding of the non-profit sector culture. She describes how she remained true to herself:

> (T)he mission was changing, and I was having a lot of trouble with Board members. I was feeling like I was being pushed out- which I was. Talking with other Executive Directors who also have struggles with their Board may not have solved any of my problems but having the sounding board and support was so helpful.

Hanna describes how the non-profit sector is influenced by administrative and technical thinking. Throughout her non-profit work she actively conversed within networks that helped validate her understanding of leadership:

> Going into the Executive Director role I had the deep sense of caring for people that I was serving. I also had an open and honest communication style with staff, Board - you have to be part of the community and the team (the Board). You (also) have to have some autonomy so that you can take something and run with it. So even though it was not a typical Executive Director thing to do (being in programs), it was a way to fulfill the mission. Maybe that was what got me in trouble - doing too much of the hands-on stuff and not enough of the behind the desk. For me there is a balance in that. My skill set and my passion was more on the street level rather than the Board table.

Hannah gives insight about how Executive Directors are often expected to manage increasing demands to fulfill administrative duties in the non-profit sector. Her upbringing,

which centred on volunteering and giving**,** as well as early career experiences that encouraged collaboration and connection to the community, influenced her choice to not fully submit to an administrator identity.

JOANNA

Joanna also grew up in a family with strong values that shaped her understanding of community. Her family is religious and political which encouraged a belief in collective well being by

She describes growing up in a rural community:

> I was politicized very young because I grew up with very progressive left leaning parents in a very right winged conservative community. At a young age I was always trying to
>
> y
>
> heard it in my community.

She developed an understanding of imbalances in socio-economic power very early in life despite growing up in a remote, rural community. Being able to discern that her family values did not reflect the dominant community values created opportunities for her to reflect on these differences.

After graduating from university**,** she became involved in the non-profit sector where she found her values more in alignment. She started working in the frontlines as a Project Leader and then working directly for the national office of the same youth organization. She was then presented with an opportunity to work for a national feminist organization which

newer, more agile, organization where she learned many technical skills that she believed would prepare her for a leadership role that would be more financially secure. Joanna shares why she prioritized learning technical skills:

> I really felt that the first 10 years of my career was learning everything I could to prepare
>
> and do everything and learn all the time. Even if you are not interested in something it do

Working in a larger non-profit she was able to learn many of the technical skills that makes her a good administrator. However, she wanted to get connected with her feminist roots again and accepted an

> They (were) a rubber stamp board. When I joined, I did not want that. I was a new ED so I wanted a Board that could offer more and that I could expect more of. It took me a while, but I really worked intentionally to get the Board Chair out and bring in new leadership. I also recruited board members that were very strategic using the feminist
>
> ey are
>
> difficult and unpopular and can lead to intense backlash.

She found that previously using a Board matrix, a tool commonly used in the non-profit sector to determine the required skills and knowledge needed (such as human resources, accounting, and marketing) resulted in Board members who did not understand feminism and could not effectively speak on behalf of the organization.

Having women Board members who have a strong feminist lens helps create new feminist practices as the organization transitioned through a growth period. This is particularly important as she reflects that projects and programs are far enough away from me that there

She acknowledges that she is increasingly encouraged to take on an administrative identity and pull away from direct involvement in programs.

She has developed creative ways to continue to reinforce her feminist identity. One way she continues to learn about the women she serves is through being directly involved in a monthly lunch for senior women in the community. Joanna describes what this means to her:

> I am not really involved with the day-to-
>
> groups. That is really my group. I am their person who gets their lunch, and it brings me great joy. It is very difficult to manage direct programming with the rest of it, but I really

> need that. I started as a facilitator. I started on the front lines. As much as I love being at the desk and happy to do paperwork, I still need some direct contact with participants.

She tries to find balance in being an administrator and identifying with the community. She

how their roles, responsibilities and rights have changed over the years. Being able to have conversations with the Board and participants helps inform Joanna on how to manage organizational growth.

TANYA

-economic power imbalances was fostered early in her life and in a very personal way. She

She shares how her sense of equity was fostered early in her life:

> I grew up in a family where everyone had a disability, everyone seemingly but me. To me disability is extremely normal. I am quite put off and confused by how people treat people that are different aka have a disability, race or whatever because I grew up with so much diversity within my own family.

She grew up with a severe learning disability throughout her schooling which led to being bullied by other children and intolerant teachers who encouraged her to leave school. These early, negative experiences taught Tanya the importance of advocating and providing opportunity for others. Even at an early age she would advocate for others:

always knew I had a big mouth. That is

> what I am saying. I need people to hear the voice of those who
>
> commitment both personally and professionally is to provide a voice to people.

Growing up having to defend and protect herself, Tanya can appear difficult to work with in her role as the leader of a non-profit to help those with disabilities find employment. She attributes her disability as the reason she reacts impulsively and competitively, which had not been well received in the non-profit sector. Talking with non-profit colleagues, she recognizes that there is a collaborative culture that encourages partnerships despite having to compete for resources. Her reflection reveals this understanding:

> stepping on a lot of toes, and I
>
> others, and I was competitive. I was getting money, but they hated me. So I had to change that. My funders were saying you have to work with other agencies.

Understanding how to balance these opposing values was confusing. Her Board president mentored her to learn how to build relationships. She was aware that she needed the help to manage her temperament:

> (M)y mentor taught me everything I needed to know. I have always had a high level of street intelligence. I had the smarts, but he needed to teach me how to be nicer to people...there are some people who really dislike me because I am very pushy.

Tanya sought the help of her mentor to learn how to balance her advocacy work and to develop the capacity to work collaboratively with others.

Although using her administrative and technical knowledge had led to financial success, Tanya struggled to conform to the non-profit culture. Her strong opinions and family history created a solid foundation for advocacy. However, surrounding herself with others in the sector with similar experiences but who understood how to use collaborative approaches was important in developing her leadership identity.

She has built an entire staff (that) self identifies as having disability ot because they had to (have a disability) but because they are the best people right now suited to do the work She also a very small board of like-
but instead work towards consensus. She describes how this Board dynamic impacts how they communicate with one another:

> They themselves live with a disability or they have a family member, such as a sister or brother, with a disability. That happens a lot with the Board. When I say they are a stake holder I mean there is a reason they are there that is deeper than the need to build their
>
> If it is not unanimous,
>
> we take it back to the drawing board.

Working with others who are focused on collaboration encourages Tanya to seek more cooperative approaches rather than always being competitive.

Citizenship Learning

The non-profit sector can be a hub for conversations on concerns that impact the public and how to address these concerns. Executive Directors create an opportunity for citizenship learning by inviting community members to discuss, make decisions and resolve common problems. As Habermas notes, citizenship learning is achieved when a common consensus on

how to solve a problem is understood after deliberation over an issue (Regmi, 2017). This may be particularly important for Executive Directors, like Evan and Rachel, who do not share the same socio-economic, cultural, or racial background of the people they serve and thus may see the problem and workable solutions differently.

These next two narratives share the story of Executive Directors who were raised in middle class white neighbourhoods with minimal interactions with people from other cultures. Their childhood was stable and privileged**,** but once they were youth, they became intimately aware of social injustices and developed an interest to learn and do more. Although not as customary today, they became Executive Directors in non-profits that support people outside of their culture over fifteen years ago. Evan is a white man who led a non-profit youth organization in an inner-city Black neighbourhood. Unlike his predecessors, he intentionally engaged the community to understand the non- culture and strategic direction. Rachel, a white woman, leads an Indigenous youth organization. She has
understand Indigenous ways of knowing that empower her to contest Western, neoliberal practices that are all too commonly accepted in the non-profit sector. The following stories provide insight to early experiences that are the impetus for people who work in the non-profit sector and focuses on the importance of citizenship learning to inform their leadership identity and practice allyship.

EVAN

her clients

with shovelling snow, getting groceries, and driving. He enjoyed these interactions and felt like he had been helpful, which was a positive experience as he often found himself in trouble at school. An exception to his generally negative schooling experience was his relationship with an

elementary gym teacher**,** who asked him to help with the younger children and inspired him to be a gym teacher. Before his final he took a job at a juvenile detention centre. He conveys how this decision changed his trajectory:

> I had grown up in a fairly middle class white bred neighbourhood. I had never really been exposed to people with different circumstances. This place was bizarre. There was a unit where if you got arrested for anything from murder to attempted suicide, they would throw everyone in together. It was the first time I had been exposed to people that had some huge challenges. I enjoyed the interaction. I did well and got really positive evaluations. It stimulated me to say there is a bigger world out there other than playing basketball and whatever.

Instead of becoming a teacher, he opted to apply his education to community recreation where he learned how to engage troubled youth. He describes how this impacted his approach to youth work:

> I was one of three animators to go out and engage youth in the community to do something a bit more positive. I had tremendous auto
> very direct, he was very open, and he was encouraging. I frequently screwed up and he
>
> probably learned more from him on how to manage people than anyone else in my career.

Evan learned that making mistakes was part of the learning process. He was not expected to consult his supervisor before making decisions and if there were unfavourable consequences, they would reflect on what had been learned. This early experience encouraged him to build relationships in and consult with the community through regular communication, an important

insight which he later applied as an Executive Director of a youth organization in a Black neighbourhood. He reveals how he knew how to deal with an initial and significant problem:

> When I got there (at the non-profit) (so) we interviewed and hired a whole bunch of youth from the community so that was an abrupt change. Everybody in the city said (the community) was violent, horrible, and disgusting. But when you hire

His earlier experiences working with youth in community taught him that they have valuable ideas that can help improve their community. He understood that they could bring in new insights and should be empowered to make necessary changes.

Evan also created opportunities to communicate directly with participants by planning and facilitating programs. He reflected

He shares how this practice helped him understand the community:

> I mentioned the guy with the military background and one of the rules at the

> really had nothing to do with the essenc

This is a good example of how cultural norms can be unique to communities and forcing outside customs on communities can create distrust. He understood he needed to build relationships and communicate to become privy to this knowledge.

As an administrator, Evan knows that part of his responsibility is to limit the risk to the non-profit, but his knowledge of the youth helped him understand the level of risk he could take in his programs**,** rather than feeling limited by liability insurance restrictions. He reflects on a conversation he had with a colleague:

> (take youth canoeing), someone is going to drown
> really want (youth to) grow (to become responsible, competent adults) When I was there every Executive Director in the city was male, white, and they were either (organization) born and bred, or they were some other kinds of traditionalist male. They were not looking to empower people -it was more about discipline. I am sure that has its place -

were more

When engaging in strategic planning**,** Evan listened to and empowered the community rather than focusing on the technically assessing strengths, weaknesses, threats, and opportunities (SWOT) that is typical of a tool called a SWOT analysis. He shares how he brought the community into these conversations:

> I would try to engage in all kinds of stakeholders and say ok what is your vision for how the organization should be? What should we be doing? One question I used to ask everybody was if you know a young person who is from here what you would want them to have or experience... And people told me later that some of the things I did fairly early

He encouraged people to draw on their own understanding of the community to share and inform the strategic planning process.

Evan adership centres on helping youth reach their potential by empowering them. Getting to know the youth, providing them with opportunities, and engaging the community in decision making helped shape his leadership everyone has paths and potential

RACHEL

Rachel describes her career path as - as she did not plan to work in non-profit or with Indigenous communities. She grew up between two households where two of her parents were teachers and assumed that she would also be a teacher. She had taken university

she had a falling out with friends. She reflects on the impact:

> I spent a couple of years hanging around the house. I had had a pretty big fight with my friends, which was a pretty big social trauma. I was in a pretty bad spot for a bit, and I am not really sure how that turned around. My parents were pretty patient with me. I actually had a guidance counsellor who sat me down with my mom and said, pull her out of school . That advice for me to drop out was probably what saved my life. I basically did nothing for a couple of years. I hardly left my house and only interacted with my family.

Up until this point**,** her life could be described as typical with few challenges. Experiencing a deep depression that resulted in leaving school before graduation provided her with a more empathetic understanding of youth challenges.

During her depression, a family member who worked in the non-profit sector invited her to volunteer and from there Rachel found herself on an unintentional career path. She recalls how this impacted her sense of self:

> It was good timing because there was a summer job opportunity for youth that I was able to be put on. I ended up working there for three years. Within a couple of months, I was essentially running a whole youth division of programming that had not existed before. People have given me opportunities to kind of do things that I probably had no right to do but it all worked out.

She alludes to the fact that she had no formal education to qualify her to perform the work she was given. However, her own experience as a youth with challenges provided the insight she needed to connect with the youth.

She was determined to work for a particular Indigenous organization that supported youth academic development. Working on the frontline, she built relationships by participating in the culture and working directly in programs and started understanding Indigenous communities. She recalls with gratitude these early experiences:

> had the chance to paddle in the rivers and go to community gatherings, to sit on the floor and eat country food. I get all of this access to unbelievable things. I have handmade moccasins, seal skin mitts and all that sort of stuff. I have just been embraced. I guess that I have had the chance to have that as part of my life, so I am pretty lucky.

Working in programs before becoming an Executive Director helped her understand the youth and continue . She describes how this knowledge helps her make decisions:

> A lot of times there is the decision to take the risk. I wonder if some of that would evaporate with someone (in a leadership role)
> the youth. If you are less tuned in, I think you would be less apt to take a risk on a kid because you are looking at it from a fundamental operations perspective possibly.

her as an administrator to meet of successful outcomes**,** even though a more technical assessment of the risk may indicate it is not a good investment.

Her leadership role increased as the organization grew and as she built trust with Board members. As with many non-profits, organizational growth meant Board members had to start fully embracing a governance role. However, board members (many founders of the organization) were resistant to letting go of their programming roles. Rachel describes how she managed this challenge:

> (This) was a struggle from a staffing perspective- (as it was in conflict with) the intention
>
> based without losing the magic of (our The Board is now a governance Board but the board members are (still) exceptionally engaged in programs in some way.

As an administrator, Rachel knew establishing strong governance for the organization was necessary. Her knowledge of the culture helped her transition the organization to a governance

board while maintaining mutual appreciation and respect with the Elders which demonstrates her ability to balance the two roles.

(being an administrator)

-profit type Similar to Hanna, she acknowledges that being an Executive Director typically means fulfilling administrative duties rather than being involved in programs.

Despite the organisational growth, she continues to communicate directly with participants while in program which influences how she approaches administrative practices like strategic planning. For Rachel strategic planning includes community members telling their stories and experiences:

> The only reason why I was doing SWOT analysis and strategic planning is because it is industry practice. We now have vision exercises...we call the cupcake and the recipe. The recipe is what we do, and the cupcake is the outcomes. And then we think about the first three years. If we can do everything we want to do, what would it be? A couple of the
>
> the space to talk about what they were seeing in the communities.

and builds her community knowledge. This filter helps her develop a strategic plan that focuses on the

Rachel understanding of Indigenous culture informs how she approaches administrative work such as policy development to ensure that it reflects the people they serve. She was

expected to introduce a policy that she felt did not align with the s culture. She recalls the tension this created:

> This year the auditors suggested that we have a fraud policy. So I tried to write one and I d fifty fraud policies trying to find something. We are an organization based on trust. We expect people to do their best and have integrity and if unless it sounds like us.

She understands that a fraud policy is a common Westernized tool to impose accountability but for her non-profit the practice suggests distrust for members of Indigenous communities. She believes h infuses my ability to stand (up) a bit counterculture to some of what your auditors think you should do.

The d rich descriptions of life experiences that informed their leadership identity and practices. Each Executive Director has their own unique learning path but all understood that adopting administrative identities and practices were required to run effective organizations. However, learning to become active citizens was also a critical part of their learning and this was done by learning from the lifeworld. The following discussion takes a closer look at the implications of learning to be an administrator, being an active citizen and why these two roles can contradict one another when leading a non-profit.

Chapter 5: Discussion and Implications

How non-profit Executive Directors develop their leadership identities and practices to fulfill their social missions in a sector influenced by an increasingly neoliberal culture is complex. In efforts to be seen as effective, they need to understand how to administratively lead organizations as well as advocate for their social missions. Using a life history approach led to a much deeper understanding of how non-profit Executive Directors not only learn how to do their job but develop identities and practices that inform their leadership.

Executive Directors learn to become administrators, by having to learn technical skills to solve organizational problems, through their networks as they manage organizational growth, and from interactions with Board members**,** who may prioritize managerial work and provide mentorship for technical skills. They learn about their role as leaders that fulfill their , which may include becoming active citizens, by experiencing transformative learning that challenges their worldviews, through connecting and communicating about social justice issues, and engaging and participating in critical discussions in their communities. The extent to which an administrative focus and/or active citizen attributes informs their leadership identity and practice reflects the opportunities they have been privy to and the meaning they assign to informal learning.

This discussion begins by focusing on the informal learning that Executive Directors experienced in understanding the business aspects of running a non-profit organization that led them to identifying and practicing as administrators. The second part of this discussion focuses on how Executive Directors informally learn to fulfil the mission component of their work in their role as active citizens. Using critical theory, I consider why striving to balance these competing demands may be problematic. I then explore the types of learning that needs to be

supported and recognized for Executive Directors, including informal learning, mentorship, networking opportunities, and potential for critical reflection.

The Business of Running a Non-profit Organization

E the business and management aspects required to become effective administrators when leading a non-profit. An administrator is defined as a non-profit professional who tends to focus on performance, measurable outcomes, accountability, and the use of private-sector management tools to structure activity and develop strategy to improve efficiency and effectiveness (Marberg, Korzilius, & Kranenburg, 2019, p. 116). Factors such as being confronted with organizational problems when entering the sector, managing organizational growth and Board authority are considered in how Executive Directors learn technical skills and are socialized as administrators.

For many of the Executive Directors in this study**,** becoming an administrator was encouraged early in their careers when they needed to learn technical skills to address financial concerns and secure funding for their organizations. This often meant learning skills like budgeting, completing grant applications, and collecting data, which Executive Directors with little or no experience found stressful. Marsick and Watkins (1990) state that informal learning is sometimes requested by people within the organization. This lack of formal orientation becomes the primary or only source of initial learning in the workplace which may continue throughout one s career (Billet, 2002). Thus initially focusing on learning technical skills can lead Executive Directors to continue seeking technical solutions to perform their role well.

Financial insecurity can give Executive Directors the understanding that effective leadership means being competitive to manage finite funding. A neoliberal culture emphasizes individual accomplishments that are achieved through personal effort**,** thus encouraging competitive environments. Tanya, Jason and Sarah described themselves as competitive and often described their work by referencing business jargon. The alignment of identity and the learning that is required in the workplace can lead to developing effective practices. Billet (2010) notes the importance of this in managing unstable work environments:

> At the heart of effective work and learning practices is the conduct of work that is salient
>
> n the
>
> turbulent and globalised contemporary work context. (p. 13)

Executive Directors who identify as being competitive and/or become competitive due to limited funding opportunities are encouraged to learn technical skills that help them increase revenues in the shortest amount of time.

However, not all Executive Directors see themselves as competitive. Rachel, who leads an Indigenous youth organization, shared how her and the Board does not worry about money, and are more focused on ensuring the youth have a positive experience in the programs with whatever resources they have. Managing the bookkeeping and seeking funding is seen as required functions of her work, rather than as fundamental to how she sees herself as a leader.

she is less confident and humbler in how she approaches the work. As a new Executive Director with only five years experience time may change how she will come to identify herself as a leader.

Executive Directors continue to prioritize becoming effective administrators as they seek to understand how they can strengthen their organization. Seeking technical solutions to organizational problems is encouraged when this leads to success (Marsick & Watkins, 1990)

(Billet, 2002). Evan had shared how funders look for and financially rewarded the implementation of systemic solutions which strengthens the rationale to learn technical skills.

Informal learning that results in organizational growth may encourage Board members and funders to allow Executive Directors more autonomy. Marsick and Watkins (1990) explain

they can try out many different definitions without the disapproval of others, as long as the organization permits and rewards this type of creativity (pg. 31). Hannah, Evan, and Rachel (who are active in program delivery) expressed the importance of having autonomy to make decisions and do what they felt was right for their organizations. Executive Directors may only be awarded autonomy when they can demonstrate their learning leads to financial stability and organizational growth. For them, becoming a strong administrator can create greater latitude to make decisions on how to serve their communities.

Executive Directors may seek more experienced non-profit leaders who have demonstrated success as administrators to facilitate their own learning. Jason, Sarah, and Evan shared how they created and turned to networks when needing to manage administrative problems. Executive Directors, who are seen as effective administrators, can teach others how to avoid or lessen inappropriate practices, make it easier to learn new practices, and help understand nuances within the sector (Billet, 2002). Workplace learning relies on relationships and people naturally learn from each other (Eruat, 2004; Marsick & Watkins,1990). Those who understand

the dynamics of leading a non-profit can share technical skills to help others reach organizational sustainabilty and growth**.**

Finally, Executive Directors learn to become administrators and use business practices when Board members prioritize managerial work and mentor technical skills. Jason, Sarah, Joanne, Evan and Rachel discussed the importance of transitioning and maintaining their Board into a governance role. These Executive Directors learned through their networks and experiences that organizational growth is more likely when Boards are not focused on programs or service delivery but rather strategic and operational oversight. Focusing on the bigger picture allows them to better assess risk, reduce liabilty and ensure compliance on legislative matters. Boards are then in a better position to ensure their Executive Directors are accountable to their administrative roles. The Board and the Executive Director relationship can then centre on upholding performance requirements on financial stability, measuring outcomes as improved efficiences are being met.

Executive Directors who lack technical skills may be apprehensive in learning this aspect of the role. Andrea mentioned how this learning can be scary and Jason talked about how he had been reluctant to ask questions at the beginning of his career. Eraut (2004) suggests that workplace learning requires people to have the confidence to initiate questions and implement ideas. Confidence can be increased when learners feel supported. Board members**,** therefore**,** can become mentors for Executive Directors to learn technical skills leading to authenticating their role as administrators. Andrea, Sarah, Joanne and Evan shared the Board member qualities that made them ideal teachers of technical skills.

While Board members were commonly acknowledged in supporting policy development, these ideal mentoring qualities were most clearly expressed when learning bookkeeping and

accounting. Andrea and Evan particularly shared how their Treasurer was instrumental in learning accounting. Their recollection of this learning was not focused on technical pieces but rather on their relationship with the Treasurer. Andrea described her relationship as supportive and felt comfortable asking questions. Evan described his relationship as being mutually respectful and they unders

An active citizen is a person who does not see themselves as simply human capital that fills

that participates in rational discussion and challenges different forms of oppression and power (Regmi, 2017, p. 689). In addition to being an administrator, Executive Directors of social justice organizations also need to demonstrate active citizenship to be seen as effective leaders. In carrying out programs to fulfil their missions, the Executive Directors engage in becoming active citizens through learning that shapes and challenges their worldviews, connecting and communicating about social justice issues, and engaging and participating in critical community discussions.

Informal learning that one achieves throughout life can impact their sense of active citizenship. Using a life history approach allowed insights in

learnings during childhood and youth which were formative in developing their worldviews. Eraut (2004) describes how this prior knowledge impacts our perceptions of current situations:

> (T)hroughout our lives we make assumptions about people, situations and organizations based on aggregated information whose provenance we cannot easily recall and may not even be able to describe. We instinctively `know' that a particular action is appropriate. (p.253)

Early childhood and youth experiences can then provide foundational insight into how we should treat one another and assess whether our actions are equitable.

As part of their learning in the lifeworld, the Executive Directors shared stories of how their family and community values shaped who they are. Most of the participants were raised in families where the parents were active in unions and political parties and/or were employed in

helping professions like teachers and social workers. Hannah, Joanne, Evan, Sarah, Tanya and Andrea have strong maternal figures who emphasized empathy and caring for others. Hannah, Jason, Evan and Joanne were active volunteers in their communities as youth. As well, Rachel and Joanne had youth experiences where they did not fit into the social norms due to differences

adulthood.

While these early experiences do not necessarily destine one to become a leader, they can inform how one may practice leadership should the opportunity arise. McCain (2019) suggests how family stories impact leadership development:

> (S)tories told within the family unit might influence leadership qualities in emerging adults and impact the ways in which a leader identity is developed. In addition, how emerging adults make sense of these stories may influence the ways in which they construct approaches to leadership. (p.164)

While only Hannah saw herself working in non-profits from a young age, the other Executive Directors considered other helping careers such as teaching or community development work. Their family stories prepared them to become non-profit leaders by developing an early understanding of social inequities and the need for advocacy.

Tanya and Sarah had particularly harsh experiences at an early age that made them aware of societal inequities. Tanya, growing up with an undiagnosed learning disability, was often bullied and disregarded by her teachers as a behavioural problem. Sarah struggled with a serious mental health issue during her youth that saw her hospitalized and her sense of agency taken

away. Billet (2009) provides this explanation to how these experiences can influence workplace learning:

> s of knowing and acting arising from their capacities, earlier experiences, and ongoing negotiations with the social and brute world, that together shape how they engage with and learn through work activities and interactions. (p.211)

The knowledge and understanding one gains from encountering especially difficult personal experiences can influence workplace learning. Tanya

Billet (2008) explains how these transformative experiences can shape work practices throughout one s career:

> Learning throughout working life, in this way, can be viewed as a negotiated, but transformative journey as individuals selectively negotiate their engagement in work, and changing work requirements, work practices and the shifting bases for participation in work. This includes reshaping their sense of self through the agentic ongoing and transformative practices of seeking the ontological security of 'being themselves'. So, individual workers are not mere and hapless hostages to the social experience. Rather, they are pressed to actively engage with it, even if only to rebuff it. (p.53)

Transformative learning, critically reflecting on the situation and participating in rational discourse with others, empowers the person to create new meaning about how one wants to act and make future decisions (Mezirow, 1995). Executive Directors who have transformative learning experiences understand social inequity, and they use these insights to inform and change practices in the workplace. They can reject administrative practices or create new practices that do not align with this understanding. This is demonstrated when Evan organizes youth trips that are seen as a liabilty and risk, Rachel struggles to create a Fraud policy or Joanne recruits Board members who have a feminists lens. They reshaped traditional work practices in their organizations.

Jason is particularly impacted by transformative learning experiences. His initial experiences working with challenging children left him feeling helpless in that he could not improve their behaviours. Originally he wanted to be a teacher but then could not imagine working daily in a classroom with problematic children. Through conversations with other Executive Directors he realized that he could influence the environment children grow in through

his programs. Although he leans heavily on operational standards, he also has learned to be adaptive to the specific contexts he is working in and provides his staff autonomy to do what is needed. Several years later, when shifting to the homelessness sector, he again was surprised in learning how socio-economic conditions led to pe situations and came to realize that it was not their own lack of personal motivation to work hard. He knows that being proficient at implementing operating standards is not the only knowledge needed to provide effective leadership.

Executive Directors further their learning to become active citizens and lead democratically by connecting and communicating with social justice orientated non-profit sector colleagues. The individual learning that has informed their worldviews is then recounted in their

knowledge influences workplace norms and vice versa:

> (E)pisodic memories of individuals are influenced both by the semi-conscious socialization process through which norms, values, perspectives and interpretations of events are shaped by the local workplace culture, and by their conscious learning from others, and with others, as they engage in cooperative work and tackle challenging tasks. (p 253)

When Executive Directors network with others in the non-profit sector who share similar views on social equity they can reinforce democratic practices.

Joanne actively recruited feminist Board Members which helps her identify and implement strategies that overcome challenges like hiring in a competitive market. Using a feminist lens, they have identified opportunities like flexible work weeks to accommodate

women who may have multiple roles. Tanya hired staff and recruited Board members with disabilties who encouraged her to reflect on her practices and consider different strategies. Tanya then learned how to be more collaborative with non-profit colleagues rather than prioritizing being competitive for funding. Challenges like workplace turnover and lack of funding can then be discussed with a social justice lens**,** making democratic solutions possible.

Executive Directors may be able to reinforce their individual learning on social justice with the non-profit sector. Hanna, whose Board wanted her to focus on social enterprising, sought the guidance and support of other Executive Directors. Learning can be best achieved when there is opportunity to ask questions about how the world is seen, whether thoughts are true or how something is known to be true (Marsick & Watkins, 1990). While financially a social

this direction. Hanna sought advice from other Executive Directors on how to manage this tension with her Board.

As mentioned, Executive Directors can be encouraged to develop into strong administrators with effective technical skills to manage organizational problems. Despite these pressures, assuming that individuals will only pursue workplace learning which aligns with employers and government is misguided (Billet, 2010). When a Board (the employer) or the government creates learning opportunties that do not align with the Executive Director understanding of non-profit work**,** they may seek learning within the sector. Developing the skills needed to solve social problems requires applicable and understanding environments where individuals can engage in personal and social identity work, clarify values, and develop the interpersonal skills to communicate across differences (Chunoo, Beatty, & Gruver, 2019, p. 91) pert co- to

understand more democratic ways of solving problems

(Billet, 2002, p. 33).

Another important aspect of learning in the lifeworld involved working with mentors. The Executive Directors often cited mentors as the means by which they were able to learn administrative and technical skills. Mentors were also sought after to provide Executive Directors with guidance some they were mentors. Hansman (2020) believes that informal mentoring experiences are often the most nd

> Informal mentoring occur(ing) when mentors and mentees agree to work together based on common understandings, interests, and goals. These relationships may be psychosocial in nature, providing learning support for mentees. (p.34)

Sarah, Evan, Jason and Jill emphasized the importance of finding a good mentor in the sector to (Nganga, Bowne, & Stremmel, 2020, p. 264). These reflections can shape identities which then inform leadership practice and influence how one mentors (Reneau & Brooks, 2020).

Executive Directors also learn to be active citizens and lead democratically when they engage and participate in critical community discussions. Sarah and Tanya are members of the communities they serve so they intuitively engage the community into conversations about their work. Evan and Rachel need to be more mindful to engage the community into their organization since they are white people leading non-profits in Black and Indigenous communities

respectively. These conversations help them understand the worldviews to inform leadership identity and practices.

the work requires will determine the amount of effort applied to develop dynamic work practices and concepts that address social concerns (Billet, 2002). This may be especially true in the non-profit sector where technical solutions rarely solve wicked problems like homelessness, poor mental health, food insecurity and other social problems. How Executive Directors are seen to use their position to help solve these problems reflects their leadership. Billet suggests how this influences their identity:

> Identity is also aligned with how individuals identify with and wish to be associated with the social world. In this way, identity is seen as an outcome, a narrative construction that is a product of this process. (p.7)

Executive Directors who want to be seen as an ally may engage with the community, understand the culture and invite participation in their organization.

This engagement is necessary to challenge assumptions and contest neoliberal, colonial ideologies. Evan and Rachel, as white cisgender people, came into their leadership roles with their own worldview. Dillard (2016) explains how being aware of personal biases can inform leadership:

> (E) are grounded in our own cultural realities. Thus, we come to race talk differently, with varying experiences of race, racism, sexism, classism, homophobia, even as they are aspects of our collective humanity. We often have really different experiences of the

> ways that culture and race work in the world (historically, structurally, and spiritually).
>
> ith talk
>
> in leadership. (p.36)

Being in positions of power, Evan and Rebecca have the discretion in how often and what ways they converse with the community. Ramedeh d to be anchored in the lived experiences of those who have known oppressions of racism, misogyny, capitalist exploitation, and we need to use tools must be disconnected from capitalist ways (p. 144.) Their intentional and mindful efforts in understanding and involving the community in organizational decision making and finding new ways to solve problems are examples of their democratic practices and a reflection of their identity.

When Executive Directors elevate the

empowerment and not retraumatizing. Evan spoke of how previous Executive Directors had tried to impose their own cultural understandings of respect which often came across as discipline. By spending time with youth in the programs he understood the cultural practices (such as allowing the youth to wear hats) that he needed to put in place for the community to feel respected and

d

ensure that their feedback is implemented in the programs. She encourages storytelling during strategic planning sessions that allows people to express their grief over suicides in their communities. Creating opportunities for people to speak directly about their experiences, especially ones that influences policy and decision making, prevents remarginalization (Butterwick & Roy, 2018).

For Executive Directors informal learning in the non-profit sector can be more complex than learning from trial and error or asking for advice to solve problems. For there to be systemic

> learning is nudged as people bump up against each other and the gaps and challenges in the system (Nicolaides & Scully-Russ, 2018, p. 119)

which does not necessarily happen with technical learning. While Evan and Rachel have learned to be good adminstrators and have the technical skills to lead their organizations**,** their practices are also democratic and reflective of their communities. Both these Executive Directors were better able to assess the risk of their youth participation in the programs based on their personal understanding of the youth as well as develop achievable strategic plans due to their community knowledge.

A Critical Habermasian Analysis

Using a critical theoretical lens helps to connect the Executive Director stories to larger societal implication**s**. Executive Directors can be socialized to become administrators and active citizens depending on the experiences, relationships, and conversations they formed. At times they were engaged in learning that reinforced technical skills and their role as administrators took priority. Other times, they learned about social injustices which motivated them to work towards social change as active citizens. Using a critical analysis, informal learning is understood as not neutral and Executive Directors experience outside pressures to focus on their work as administrators in response to neoliberal cultural expectations. Executive Directors must then maintain a balance between the competing priorities as neoliberal pressures increase.

Habermas, a critical theorist, brings insight to how informal learning is achieved through his theory on communicative

how common structures, policies, and rules can create obstacles to realising a true democratic society.

During the Enlightenment of the 17th and 18th centuries there were dramatic changes to scientific discovery. The subsequent industrialization and modernization of society required the system to create order and lawfulness through governing administration and related institutions such as political parties. Today, there is an expectation within Canada and other social democracies wellbeing by providing more equitable opportunities for basics such as housing, health care, childcare, education, and employment.

The system is informed by knowledge that has been assumed through science and technology**,** thus creating a methodical, calculating, and functional mindset known as (Finlayson, 2005). Decision making and meaning making rely less on communication and are facilitated by checklists, calculations, and policy. In the non-profit sector this can be seen through the adoption of operating standards, policy templates and regulated grant applications. Habermas (1987) explains how the system is influenced by power and money:

> Media such as power and money attach to empirical ties; they encode a purposive-rational attitude towards calculable amounts of the value and make it possible to exert generalized, strategic influence on the decisions of other participants while bypassing process of consensus-orientated communication. (p. 183)

Since the system is regulated through power and money and relies on established rules, those making decisions within the system experience external constraints and are not really in control

of the end results. Within the system there is a focus on system structures**,** such as when business models are implemented in the non-profit sector. As well, the significance of economic and administrative decisions can go unnoticed or appear to be inevitable (Finlayson, 2005). Non-profits often supplement support services, particularly for priority populations**,** when the system is overwhelmed and can not meet societal demand.

(Finlayson, 2005, p. 51)

ety as a social construction of the everyday world that

(Habermas, 1984, p. 79). People experience everyday interactions, share ideas, and communicate their values and beliefs thus becoming active agents in creating their lifeworld (Gouthro, 2006). These interactions form the

decisions and behaviours. The lifeworld is more connected to

grassroots which can inform non-

required programs and services.

The system is reliant on the lifeworld to uphold the rules to maintain order which, according to Habermas, over time has become more complex with its intensification. For example, Executive Directors may spend hours completing complex grant applications even if they are unsure they will receive the funding because there are limited alternatives for financial support. The lifeworld, ideally preserved through consensus, is increasingly permeated by the

decreases mutual understandings, erodes social bonds, increases sense of alienation, demoralizes

(Finlayson, 2005, p. 57)

increasingly stripped of its life orientating potential and economic restructuring is wreaking

(Welton, 1995, p. 131). Aspects of our society such as health, education, and culture try and fail to serve both the system and lifeworld. Specialists, who possess instrumental knowledge, are increasingly called upon to inform decisions rather than

how the non-profit sector experiences this tension.

Executive Directors may prioritize organizational sustainability when they begin their non-profit careers. Rather than engaging in dialogue with people during programs and service delivery, they focus on learning how to pacify funders (frequently government departments) who hold the power over their organizations. Evan, Sarah, Joanne, and Allison focused their learning on how to measure outcomes (often quantitatively), effectively budget, and increase revenues through grant writing and fundraising early in their non-profit careers. Executive Directors communicate to funders through application forms and reports which supports a transactional relationship with the primary objective to please the funder. Such socialization into the non-profit sector may lead an Executive Director to identify as an administrator fulfilling the technical roles.

Executive Directors who see themselves as primarily administrators may not recognize the importance of communicating with the people being served. Jason, Eric, Joanne, and Sarah increasingly rely on their frontline staff and assigned supervisors to ensure that programs and

anne and Rachel expressed concern that they were losing touch with the people in their programs as their organizations grew. Eric, Jason, Evan, Rachel, and Andrea (who are not from the community or do not have relatable life

experiences) are limited in developing an understanding of the social issues when not participating in direct dialogue with citizens. Without these more respective relationships, the communication with those being served also becomes transactional as interactions are limited to addressing complaints or collecting payments on past due accounts.

Welton (1995) describes those who work in human service fields, like Executive

tugged between how governments and the private sector often understanding problems as being well defined**,** with clear coherent solutions which oversimplifies the learning required to address the situation (Eruat, 2004). Executive Directors who learn technical skills to solve problems can be perceived as more effective in managing their organizations while overlooking larger systemic issues.

In Habermasian terms, focusing on learning technical skills reinforces that instrumental rationality is prioritized over communicative action to solve problems in a capitalist system (Habermas 1984, 1987). By working in a society that values market rules and individualism, Executive Directors knowledge and skills for becoming more competitive being the rational option even if this only improves the individual and not addressing greater societal issues (Regmi, 2020, p. 229). Jason, whose non-profit experience had been in the youth sector, recounted that he was hired at a larger non-profit for his knowledge of operating standards and organizational development rather than his understanding of homelessness and poverty. Learning technical skills therefore may improve an Executive Director status of being an effective leader (and their employability) without actually solving societal problems.

However, an over reliance on technical solutions can create leadership that fails to consider complex situations and reinforces decision making based on money and power. Jason is convinced that Executive Directors who learn and implement operating standards will provide exceptional leadership. Regmi (2017) explains that within our capitalist society administrative and economic subsystems diminish one s capacity to challenge hegemonic power and come to behave in ways that serve the system. When Executive Directors identify more as administrators

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obstructing knowledge from the lifeworld (Welton, 2005). Executive Directors may be unable to question the rational of implementing technical solutions when this learning is focused on achieving financial stability and autonomy but does not result in societal change.

In a neoliberal society, the system complicates and colonizes the lifeworld. Instrumental rationality, creating technical process and approaches when trying to make decisions or solve problems, dominates over communicative rationality (Regmi, 2017). All of the Executive Directors expected their Board members to serve a governance role and often presumed they would have professional expertise in technical and/or business knowledge. Working within this context then**,** Board members knowledge may be considered more important and significant to the success of the non-profit and the priority of technical skills may remain unquestioned. Habermas (1987) explains:

> People colonise
>
> the rules that govern their actions because their goal-directed actions are coordinated not only through processes of reaching understanding, but also through functional interconnections that are not intended by them and are usually not even perceived within the horizon of everyday practice. (p. 151)

Consequently, Executive Directors may then identify the need to become adminstrators who effectively use business practices rather than increasing the use of communicative rationality to guide and shape their decisions. However, when Executive Directors engage in communicative rationality their understanding and abilty to lead democratically may be enhanced.

Despite the neoliberal influences that encourage Executive Directors to become administrators, they are also compelled to become active citizens who resist conforming to systemic demands. To diminish the impact of the system on the lifeworld, Habermas argues that

are shared, argued, and negotiated can be used to dispute the rationality based on instrumental thinking (Habermas, 1984). Decisions are based and conducted on the information gathered through discourse with others, so actions appear inherently trustworthy, reasonable and are expected to benefit others rather than being self serving. Habermas describes how these decisions can be understood:

> What is primary interest in analyzing the interaction between normative consensus, worldview, and institutional system, however, is that the connection is established through channels of linguistic communication. (Habermas, 1987, p. 56)

eaningful and open discussions to make explicit

(Gouthro, 2006, p. 12).

they are lazy were challenged when he talked with other Executive Directors who are empowering youth and housing people.

Communicative action requires learners to be critical and have the courage to question what others are saying (Veen, 2007). This process requires people to maintain a level of

autonomy to critically reflect and support a well-balanced society. Habermas (1984) describes being rational as when:

> (H)e ***sic*** puts forward an assertion, and when criticized, to provide grounds for it by pointing to appropriate evidence, but also if he is following an established norm and is able when criticized, to justify his action by explicating the given situation in the light of legitimate expectation. (p. 15)

lessen the

financial problems may seem irrational, especially since she ultimately left her position. However, her non-profit network provided her conviction that she had made the right decision for her.

The lifeworld connects people through a network of norms, values, culture and shared understanding which is understood through meaningful discussions (Regmi, 2017). Throughout the interviews, the Executive Directors provided insight on the democratic values learned from their networks such as collaboration, understanding community needs, shared decision making and empowering others. These exchanges are examples of how language can be used to mediate between the system and lifeworld. Terry (1997) explains that:

> Habermas sees the reproduction of the social sphere in terms of a struggle between social systems (administrative, economic, bureaucratic) and the life-world in which we live out our daily lives. He characterises the goal of the system as the colonisation of the life-world, and sees language, the means of achieving rational consensus, as the primary mode of social interaction by which this process of colonisation may be resisted. (p.272)

Non-profit networks can reflect lifeworld needs and its invisible mental map when Executive Directors seek ea administrative or technical solutions. Executive Directors with significant experience can be seen as what Haberms (1987, p. 32) refers to as ded to legitimatize these interpersonal relations. Jason, Evan, Sarah, Joanne and Rachel all sought mentors that served as reference persons to understand non-profit leadership.

In addition to non-profit networks, communicative action can occur within the communities being served and can inform the non-profit s mission. Evan and Rachel created space for the community to be involved in deciding the strategic direction of the organization. Brookfield (2010) explains how empowering the community supports democratic practices:

> Learning to lead democratically in the cause of empowerment entails learning to distinguish each distinctive voice in the sometimes-overwhelming cacophony of democratic deliberations. Who each community member is, what each person most -being, are all concerns that democratic leaders which means, potentially, everyone must learn to address. (p. 9)

Although their strategic planning process may seem unconventional and resulted in more deliberation, they developed
community felt heard.

The theory of communicative action can explain how Executive Directors can learn democratic practices. Habermas furthers our understanding of how identities are developed by

(the objective world), society (the social world) and personality (the subjective world). In the process of socialization, individuals construct their social world, learn to follow norms and take on various roles (Habermas 1987). These interactions with other members of the lifeworld are unique**,** thus pers which, in each instance, only one individual has privileged 984, p.52). So while the non-profit sector helps socialize Executive Directors into their leadership roles, they also come into their positions with prior learning from personal life experiences that inform their identity.

Our identities are formed very early in our lives as we communicate and interact with our families and within our communities. Habermas (1987) explains:

> (When) persons acquire their identities through linguistically mediated actions, they satisfy the conditions of identity for persons, and the basic criteria of identity for specific persons, not only for others but for themselves as well. They understand themselves as persons who have learned to take part in social interactions; they understand themselves as specific persons who have been raised as daughters or sons in specific families, in specific geographical locations, in the spirit of specific religious traditions and so on. (p.105)

When the Executive Directors talked about their life history they did so in relation to their parents and siblings, whether they lived in cities or rural communities, and their religious affiliations or lack of which shaped their values and who they are.

At various points in their lives, before entering the non-profit sector, they became aware of social inequities through their own personal experience or witnessing others. From these

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and democratic practices are essential for Executive Directors to lead and work towards systemic change.

Chapter 6: Conclusions

Implications for learning to become an Executive Director

Informal Learning

With limited time and money, informal learning can play an essential role in how Executive Directors learn their jobs. Evan and Joanne started their roles when their organizations were experiencing unstable funding. Rachel was her utive Director, and Sarah and Tanya were the founders of their non-profits. Learning was often initiated when the Executive Directors experienced an unfamiliar problem or challenge in their work (Marsick & Watkins, 2018). Informal learning can be overlooked and disregarded, but valuable workplace learning often occurs on the job rather than through formal education and training (Eruat, 2004). Learning technical skills such as writing grants, creating budgets, and developing policies to become effective administrators were frequently learned informally by the participants in this study through their networks and mentors.

Networks and mentors can also play an essential role in helping Executive Directors be active citizens and practice democratically. Informal learning was integral to understanding how to carry out the work needed to fulfil missions. Jason, Evan, Sarah, Joanne, and Andrea intentionally sought out others in the sector to develop their leadership identity and practices. Unlike formal learning, people can find incidental, unintended learning as empowering in that one can take control of their own learning (Elliot, 2011). These relationships and conversations can inform an understanding of non-profit culture and how one works within the sector. Jackson (2011) explains the impact when these relationships are diverse:

> (I)n an era of globalization, the fulfillment of social justice more than ever depends on fostering cosmopolitan citizenship and enhancing solidarity, developing an ability to interconnect with people of different backgrounds, and making it possible for them to participate in intercultural dialogue on equal terms. (p. 187)

When Executive Directors learn informally, they can choose their networks and mentors that fosters a non-profit sector that reflects the diversity of communities.

The non-profit sector can be seen as under threat to become more business-like in its attempt to adapt to the increasing emphasis on neoliberal values. Tanya talked about constantly learning so that she can stay ahead of the competition and Rachel shared how she is always integrating innovative technology to keep pace with increasing demands on her time. Leading in the non-profit sector is becoming more complex and difficult to predict what knowledge will be useful. (Korhonen, 2011) argues that formal learning is unable to prepare one at the frequency these changes are happening:

> When we think of the multiple changes in our world and their increasing pace, it becomes doubtful as to how well educational systems, as large-scale structures, will be able to cope with them. Consequently, the learning outside of institutions will prove to be even more valuable than it is now. (p. 286)

how to become a better human being (Korhonen, 2011, p. 286). Similar to Cooper and Lyons' (2017) findings, the Executive Directors' worldviews were expanded when informally exploring others' worldviews, and this impacted how they saw leadership and how others saw them as leaders.

Arguably, depending on the background of the leaders of non-profit organizations, expanded worldviews and insights into their roles as active citizens may not be the most essential learning that an Executive Director needs to achieve to lead a non-profit. Fields (2011) found that those who had less formal education and working in civil society organizations preferred that formal training opportunities support the development of more labour market relevant skills.

people are more inclined to participate (p. 171).

However, when Executive Directors see themselves as active citizens, learning the technical skills they need is more likely to be in response to the primary interest of the non-profit not for the sake of their own marketable skill status. Evan, Sarah, Joanne, Andrea and Jason found mentors whose values and principles aligned with their own to help them learn these skills. Mentors were often Board members, most notably Treasurers, who had the formal education which was, as Evan noted, well beyond the non-profits needs. They provided the Executive Directors with a comfortable learning environment where they openly asked questions, discussed their particular situations, and created a sense of kinship. Executive Directors had the opportunity to reinterpret tasks that may be considered common or general knowledge (like developing a budget) and give new meaning (Eraut, 2000). Mentors and networks have an integral role in fostering Executive Director informal learning to become leaders who embrace active citizenship while also being effective administrators.

Mentorship and Networks

Mentoring relationships that focus on offering technical skills are not always complimentary**,** and can be difficult due to power imbalances. Mentors who see their role as a

supervisor, advisor and trainer, or paternalistic are less likely to provide opportunity for self reflection or encourage others to develop more progressive perspectives (Green, Tripp, & Hoffman, 2020; Hansman, 2020). To avoid this situation, Andrea, Sarah, Joanne, and Evan carefully recruited Board members, knowing that they would need help to learn technical skills while realizing that accounting professionals may have little experience with social justice work. Reneau & Brooks (2020) describes how mentees can understand if a potential mentor meets this measure:

> For individuals, shame may be deeply connected to their stories; the willingness to share their stories can be impeded by a belief they will be further seen as flawed and unworthy in the mentoring relationship. Conversely, if mentors are willing to share their stories, this can lead to meaningful and mutual revelations of who they truly are. (p.103)

Mentors who hold high status, professional roles and who are willing to demonstrate vulnerablity by sharing weaknesses or personal stories may be stronger mentors for the non-profit sector.

done a lot of self reflection and Rachel learned her stories of trauma. The mentors/mentees relationship is more comparable, each bringing knowledge into the relationship that is shared through conversation.

Hansman (2020) stresses that mentoring relationships are also an opportunity for mentors

tise and

willingness to share technical skills and the desire to be more enlightened created relationships where the Executive Director could be vulnerable**,** yet still be trusted to lead the organization. Nganga, Bowne, & Stremmel (2020) describes this as developmental mentoring by using conversation and questioning to foster and support the development of self-awareness, self-

understanding, and personal wholeness (p. 273). By helping her Board members to develop a feminist lens and build confidence to speak on behalf of the organization is an example of how Joanne was also a mentor.

Despite attempts to create egalitarian relationships, Boards do have power over Executive Directors and have discretion as to how they choose to support their learning. Hansmen (2016) explains:

> Mentors may further exercise power by not providing assistance to mentees in understanding and navigating the organizational politics that may support or impede their careers, or they may hinder their mentees from critically examining organizational values or structures that may privilege certain ways of knowing or groups over others. (p.35)

Board members can ultimately choose whether or not to mentor Executive Directors**,** such as in Hannah **,** where she was peripheral to any conversations about finances. As well, they can prioritize technical knowledge as being the most critcal knowledge in demonstrating effective leadership. Therefore, it cannot be assumed that positive mentoring relationships will always develop between Executive Directors and Board members.

Within non-profit networks, mentors can be found who offer personal consultation to validate and refute information that Executive Directors receive from the system, which reflects neoliberal values. Mentors can help Executive Directors to negotiate the meaning of technical knowledge, so these practices are more in accordance with the lifeworld, as they are focused on supporting the community that the organization serves. As well, network mentors can be extremely helpful navigating complex decisions and relationships that are not as straightforward as learning administrar.02p3(e)4(cst)-4(ra)e.

By using democratic practices, mentors and networks in this study often actively listened to Executive Directors reflect on their situation and coached them to solutions rather than simply giving advice. Alston & Hansman (2020) model for inclusive mentoring called T.A.K.E. (trust, accountability, kinship emancipate) G.O.O.D. (grace, objectives, openness, deconstruct) C.A.R.E (courage, affirm, reflect, engage):

> (This model) encourages the establishment, enhancement, and sustenance for mentoring relationships, and further, celebrates the diversity among the mentor and mentee while demonstrating equitable and inclusive behaviours toward each other while developing future leaders. (p.92)

In addition to being strong administrators,
reflect the community. Knowledge is then constantly renewed and reproduced to sustain the non-profit culture that reflects the lifeworld and yet is able to operate within neoliberal society.

Critical Reflection

Informal learning can involve reflecting on experiences to provide meaning to change the way one thinks or acts. As Executive Directors are learning their role and how to be effective leaders**,** they are responding to situations which enhances their understanding and they may become aware of their own unspoken assumptions. Watkins, Marsick, Wofford and Ellinger

needed to assess lessons learned, examine mistakes, forestall unintended consequences, unearth assumptions, or transform views (p. 32). They suggest reflection is encouraged when we receive feedback. Executive Directors can learn from their mistakes when they pause and think about the consequences of their actions and use feedback to determine their effectiveness.

Reflection can create and recreate practices which builds professional knowledge. Loughran (2002) argues:

> It is through the development of knowledge and understanding of the practice setting and the ability to recognize and respond to such knowledge that the reflective practitioner becomes truly responsive to the needs, issues, and concerns that are so important in shaping practice. (p. 42)

When Executive Directors reflect on what they have informally learned they can determine if practices are effective**,** such as when Andrea reflects on her participants experiences and then standardizes the day to day procedures to simplify decision making.

However, reflection not only occurs as an individual activity that takes place in one s mind. Regmi (2020), drawing on Habermas, suggests that even though our learning may be self-directed or achieved through self reflections it is still with the objective world (p. 226) thus reproducing our lifeworld. Brookfield (2010) describes:

> Critical reflection explicit focus (is in) uncovering, and challenging, the power dynamics that frame practice and uncovering and challenging hegemonic assumptions (those assumptions we embrace as being in our best interests when in fact they are working against us). (p. 216)

Evan, Jason, and Rachel gained insight to the values and beliefs by directly communicating with the community, thus creating a reference point to compare new information. Without critical reflection, an Executive Director can be influenced to become highly administrative and disconnected from community or be overly engrossed in social activism and fail to meet the requirements for organizational effectiveness and sustainability.

Finding the balance between these two roles requires one to reflect on their own circumstances, the meaning they attribute to them and how this influences their leadership. By

view effective leadership.

Mentorship that occurs within non-profit networks can help Executive Directors to critically reflect on their learning

power that have invaded the lifeworld (Brookfield, 2005, p. 258)

Critical reflection can be difficult if Executive Directors become aw Tf1 03ieircrr4(ff)-3(nt)20( )] TJETQ

Learning how to critically think and taking the time to do so is an important consideration if informal learning should encourage an active citizen identity and democratic practices.

Limitations of study

Using a life history approach allowed a deeper understanding of how informal learning

-profit leaders. Rather than just focusing on informal workplace learning, this study considered the informal learning that occurred within families and communities in addition to the non-profit sector. This method

should not be) reproduced**,** while also bringing awareness of the impact of informal learning and how we can foster meaningful and intentional approaches to develop effective leadership in the non-profit sector.

This study focused on Executive Directors who lead small to medium sized non-profits (initially less than $800,000 and no more than ten full time staff). Arguably, these Executive Directors may not have the same level of administrative demands as larger non-profits who have significant operational budgets, larger staff teams and provide service in multiple locations. In such situations Executive Directors may have dedicated staff to perform administrative duties or they may choose to delegate program and service delivery solely to front line staff and supervisors. This is a very different dynamic than the Executive Directors who participated in this study experience in their work, in that they performed several functions that ranged from an active citizen role to that of an administrator. Further research with Executive Directors from larger non-profits would help bring understanding on how others learn leadership identity and practices that foster civil society within this context.

As well, the Executive Directors in this study had spent the majority of their career in the non-profit sector and had not held leadership positions in other sectors. Traditionally the non-profit sector has been an employer of choice for those who are altruistically inclined and/or social activists. Compensation has been understood to be lower than the market and was augmented by the idea that one would be performing work that is meaningful and speak to one s intrinsic rather than materialistic motivation. However, increasing number of non-profits are offering competitive wages and are thus attracting leaders from outside of the non-profit sector. Executive Directors who represent this trajectory may come to the position with significantly more administrative and technical skills. Consequently**,** informal learning and lifelong learning could look substantially different. Further inquiry would help inform how these Executive Directors learn to become active citizens and lead democratically within the non-profit sector.

The Executive Directors in this study, with the exception of one, were white and raised predominately within Westernized society. This is reflective of the lack of diversity that exists in leadership roles in the non-profit sector. The 2020 Atlantic Provinces Economic Council (APEC) reported that about 9% of executive directors and CEOs who responded to their survey identified as visible minorities, with 2% Black and 2% Indigenous (Brannon, April 2020). The composition of the Exe Boards in this current study was not requested, but according to the 2021 Statistic Canada survey those who identify as immigrants, persons of colour, LGBTQ2S+ individuals, persons with a disability, and First Nations, Metis, and Inuit are vastly underrepresented on non-profit and charity boards of directors (Statistics Canada, 2021). Therefore, the Executive Directors (and indirectly their Boards) in this study may largely represent Eurocentric worldviews and therefore the participants may experience informal learning accordingly. Further research with Executive Directors from the BIPOC (Black,

Indigenous, and People of Colour) communities would extend our understanding of how informal learning within different cultures impacts leadership identity and practices in the non-profit sector.

As well, this research began in 2020 and concluded early in 2022. During this time the number of Diversity Equity Inclusion (DEI) nonformal learning opportunities has increased substantially. DEI practices are becoming more prevalent with many non-profits adopting the

implement programs, services or policies without those who are directly impacted involved in the decision making. Therefore, Executive Directors are increasingly being expected to learn and implement democratic practices. This current study suggests that this has in part been done through informal learning through non-profit networks and mentors. As this becomes increasingly part of day to day conversations and a growing number of nonformal learning opportunities through workshops, webinars and articles are being offered**,** further research is needed to understand the strategies and supports that influence learning in the non-profit sector.

Conclusion

We are living in a time where neoliberal approaches to social problems are being challenged and the demand for systemic change is increasing. Yet non-profits must continue to be focused on financial sustainability thus Boards of Directors (and the sector) can emphasize the importance of Executive Directors knowing technical skills and being effective administrators. The easiest way to demonstrate this knowledge is through certificates and degrees as well as work experiences in other sectors. The knowledge needed to facilitate systemic change, however, may , which requires a deep understanding of social inequity.

This knowledge serves as a foundation for critical reflection and may be achieved informally and then reinforced with those in the non-profit sector who are concerned with social justice issues. As the non-profit sector attempts to diversify its leadership and facilitate systemic change**,** I encourage those in the sector to acknowledge (and continue to support) the informal learning that brings people to want to work in the non-profit sector and consider them for leadership roles. This study shows that the required technical knowledge to become strong administrators can be achieved informally when Executive Directors have supportive networks and Board members who can be mentors once in the sector. When we respect and value the diverse life histories and the cumulative knowledge gained from experiencing hardship, inequity and social injustice**,** the non-profit expertise becomes much richer in demonstrating active citizenship and democratic practices.

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Appendices

Appendix A

Striking the Balance:

Through Life History

Seana Jewer, MA Ed (ca)
Mount Saint Vincent University

Executive Director Participant Information Package

Overview of Research Study

I am investigating how Executive Directors (EDs) develop their learning paths and identify their knowledge gaps. In this study, I wish to explore what motivates EDs to learn. In addition to understanding personal factors that impact learning, I will also be exploring how decisions about learning may be connected to organizational, government, and societal influences. I am conducting interviews with five to eight Executive Directors who have been working for a minimum of three years for small to medium non-profit/ charities (under 10 full time employees and/or under $800,000 operating budget).

Contact Information for Researcher

Seana Jewer
MA Ed candidate, Faculty of Education
Mount Saint Vincent University
Halifax, Nova Scotia

(XXX) XXX-XXXX
Seana.jewer@msvu.ca

Background

I am a candidate in the Master of Arts in Education (Lifelong Learning) at Mount Saint Vincent University. I have been working in the non-profit sector for the past seventeen years, ten of those as an Executive Director. I am currently working part time with the Canadian Mental Health Association as well as a facilitator for Recreation NS. I am also a volunteer with the Nova Scotia Health Authority Southeastern Community Health Board, the High Five National Program Development Committee and the Red Cross.

Letter of Informed Consent

Date

Dear _____,

You are invited to participate in a qualitative research study to be used for a Master of Arts in Education thesis at Mount Saint Vincent University (MSVU) entitled: *Striking the Balance: Wpfgtuvc pfkpi "vjg'Gz gewvkxg'Fkt gevqt u'Ngct pkpi "Rcvj"vjt qwi j"Nkhg'J kuvqt* . If you agree to participate in this study, I will arrange an interview at a time and place that is convenient for you. Although I do not anticipate any risk to you, you may decide not to participate at any time, prior to, after, or during the study.

The interview will take about an hour to an hour and half to complete. This research uses a life history approach, so I will be asking you to share information about learning experiences throughout your life that may have influenced your learning path as an Executive Director (ED). In particular, I will ask you to discuss how you decide what you need to know as an ED and how you pursue this knowledge. I am also interested in the role that government, the private sector and Board of Directors may have on your learning.

Although the interview contains some general questions, for the most part it will seem conversational. Before the interview you can share certificates, books, training materials, photos or other items that represent your learning. With your permission, I will take pictures of the artifacts which will be downloaded to a secure server as well as record our conversation. As a part of this document, you will find the interview schedule that will be used to guide the interview. You will be asked to reflect on these questions in advance to prepare for the interview. You can also let me know if there are any questions you do not want to answer.

During the interview, I will use a digital recorder to record the conversation and you will be asked to sign a form agreeing to have your interview recorded. The interview will be transcribed into text. After the interview you may reflect on your answers and want to add more information. You can choose to review the transcripts so you can edit, add, or remove data. While reviewing the transcripts keep in mind I will be using direct quotes, so you can also remove or change information that you are not comfortable including. You will be asked to return these transcripts within two weeks if you wish to make any edits. If you require more time for review, an extended deadline will be agreed upon.

As a participant in this study, your identity will not be disclosed, and your information will remain confidential. I will use pseudonyms in place of real person names, places, and other information that could be used to identify you. I may also use more general descriptions such as (i.e. names of workplaces, community or family members, specific numbers of staff or size of Board of Directors, etc.) to reduce the chance that you or your organization could be identified.

Only myself, my thesis advisor, Dr. Gouthro, and committee member, Dr. Heidi Weigand, will have access to your transcripts, and we will all strive to ensure confidentiality of your identity.

After the interview you may think of someone who would be interested in taking part in this research. If you would like to refer someone, you can provide me their name, phone number or email address. When contacting this person, I will disclose who provided me with the contact information. You can also request to contact the person first to ask if they would be interested in learning more about the research study.

The transcripts will be used to provide data for academic and conference papers. Information, including your quotes, may be used from this study in presentations, workshops and poster sessions. Information about the research study may also be shared through a website and social media sites such as LinkedIn, Twitter or Facebook.

The data will be kept in a locked cupboard, on password protected computers, and uploaded to a secure university server. Data will be destroyed five years after completion of the study.

Your participation in this study is entirely voluntary, and it entails minimal risk to you. At any point in time, prior to the transcript being finalized, you have the right to withdraw from the study. Your signature on the bottom of this letter indicates that you have read the above information and agree to be interviewed and review transcripts if desired. You will be provided with a copy of this letter for your files. Thank you.

Sincerely,

Seana Jewer

Informed Consent Participating in Interview
I have read through the attached letter detailing the research study, *Striking the Balance: Wpfgtuvc pfkpi "vjg'Gz gewvkxg'F kt gevqt u'Ngct pkpi "Rcvjul'vjt qwi j"Nkhg'J kuvqt* and agree to be interviewed for the study:

Signed _____ Date: _____

Transcript Review

I have read through the attached letter detailing the research study, *Striking the Balance: Wpfgtuvc pfkpi "vjg'Gz gewvkxg'F kt gevqt u'Ngct pkpi "Rcvjul'vjt qwi j"Nkhg'J kuvqt* and understand that my transcript may be quoted directly. Please initial if you wish to review and edit your transcripts.

_____ I wish to review and have the opportunity to edit my transcript.

Informed Consent Audio Recording
I have read through the attached letter detailing the research study, *Striking the Balance: Wpfgtuvc pfkpi "vjg'Gz gewvkxg'F kt gevqt u'Ngct pkpi "Rcvjul'vjt qwi j"Nkhg'J kuvqt* and agree to have my voice digitally recorded for the purpose of the study. I realize that I have the right to request

that the audio recording machine be turned off at any time, and any information I do not wish to share I can request to have deleted from the transcripts.

Signed: _____ Date: _____

Informed Consent Pictures of Artifacts
I have read through the attached letter detailing the research study, *Striking the Balance: Wpfgtuvc pfkpi "vjg'Gz gewvkxg'F kt gevqt u'Ngct pkpi "Rcvju'vjt qwi j"Nkg'J kvqt* and agree to have photos taken of any artifacts that I have chosen to share such certificates, training materials or books.

Signed: _____ Date: _____

Referring Potential Participants
I am willing to pass along the name and contact information of a colleague(s) who may be interested in participating. I am under no obligation to pass along this information, and there will be no penalty if I do not provide this information. With regards to referring participants for this research, please initial next to any of the statements that you agree with:

_____ I understand that if I provide a referral for someone to participate in this research the person will know I was the source of the referral.

_____ If I provide a referral for someone to participate in this research, I wish to contact the person first.

This research has been reviewed and approved by the Mount Saint Vincent University Research Ethics Board. If you have any further questions or concerns about this study, please contact:

Seana Jewer, MA Ed (ca), Researcher
seana.jewer@msvu.ca
XXX (XXX-XXX)

Dr. Patricia Gouthro, Thesis Supervisor
Faculty of Education
Mount Saint Vincent University
patricia.gouthro@msvu.ca
(XXX) XXX-XXXX

If during or after the study you have any concerns about how the research was conducted, please contact the Chair of the University Ethics Committee at Mount Saint Vincent University, c/o the Research and International Office at (902) 457-6350. Thank you!

Appendix B

Interview Schedule

(Please note in a semi-structured interview other questions might be asked as well, and it will feel more like a conversation than a strictly structured interview)

1. Please tell me about the values/beliefs that you learned as a child/youth who or how did you learn these? How have they influenced your work in the non-profit sector?

2. As a child/youth did your schooling experiences encourage you to pursue certain career paths? Were you stronger in some subjects more than others?

3. Tell me about your career trajectory that had led you to the non-profit sector. How has your education and/or previous work experience impacted on what you need to learn and how you learn as an ED?

4. How would you describe the mission of your organization? How do you identify with this mission?

5. What did you already know about this work and what extent do you continue to learn about it as the ED?

6. Would you say that the topics/issues you have focused on learning are different than what you had expect or want to learn in your role as an ED?

7. How do you determine what is critical to learn in developing your skills and knowledge as an ED? Has your focus changed as you gained more experience?

8. How has your Board of Directors influenced your learning path? (ex: provided training, support a training budget, compensated for training time, outcome from a performance appraisal, strategic direction, etc.)

9. of leading a non-profit organization? How critical has this been to your success as an ED and your organization?

10. Once you have identified something you need or want to learn, how do you accomplish this learning? (ex: workshops, online, mentors, courses, etc.)

11. Reflecting on the learning you have achieved as an ED, tell me about your experiences learning informally through life experiences versus more structured learning (ex: workshops, courses, degrees)?

12. How would you advise a new ED to build their skills and knowledge to be successful in the position? What factors should they consider?

13. Is there anything you would like to add before ending the interview?