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Understanding and Overcoming Pitfalls

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Leaders will encounter many different pitfalls when developing and implementing systems of care. How a leader predicts or deals with obstacles determines whether he or she can strategically maneuver through or around them. Some common pitfalls a leader may experience while developing systems of care are discussed in this chapter. A leader may commonly encounter three primary types of pitfalls: personal, organizational, and environmental.

Leaders may encounter personal pitfalls as they react to personal challenges faced while leading change, as they interact with others and express their leadership style. Organizational pitfalls may emerge from the nature or culture of organizations, especially when working in partnership with multiple organizations/systems, and they affect how a leader handles changes. Lastly, environmental pitfalls are challenges generally beyond the control of the leader or organization. Environmental pitfalls can come in the form of statewide budget cuts, the death of a client, or a lawsuit.

The authors suggest strategies for overcoming some common pitfalls and provide examples to add clarity, while recognizing that other chapters in this book offer leadership strategies that can overcome pitfalls. Many pitfalls can be anticipated and overcome in part by laying groundwork before they appear. Unfortunately, some pitfalls develop into problems to be worked through or circumnavigated.

Successful leaders know that pitfalls will appear and can use the system of care infrastructure to address them. The eight pitfalls described in this chapter are as follows. *Personal pitfalls*: 1) being a beacon of loss, 2) becoming a martyr, 3) using dictatorship instead of collaborative leadership, 4) and confusing passion

with leadership; *organizational pitfalls*: 5) not understanding organizational culture, 6) confusing technical challenges with adaptive challenges, 7) and experiencing changes in leadership; and an *environmental pitfall*: 8) enduring economic changes.

Leadership is like navigating, rather than steering, a boat. Almost anyone can steer a boat in a given direction if he or she has some basic understanding of driving. Navigation is much different. While navigating a boat, the destination point has to be determined in advance and a course charted to ensure that the boat arrives at its destination. This involves mapping out the coordinates of the boat's starting point, planned stops along the way, and the boat's final destination. It requires determining the direction the boat will be heading, the speed the boat will be running, guiding the boat around obstacles, monitoring the depth of the water to make sure the boat does not run aground, monitoring the weather and wind, and taking the current into consideration, all while watching out for other boats. Even with a precise course charted, the captain will have to make mid-course adjustments, sometimes charting a whole new direction because of unforeseen circumstances.

Leadership requires similar actions. Certain pitfalls will show themselves and can be circumnavigated. Others will be less obvious and require different, more drastic actions to reach a final destination. The eight strategies for overcoming pitfalls described in this chapter are examples drawn from the authors' experience in developing systems of care: 1) separating self from role, 2) creating distance to gain perspective, 3) using collaborative leadership, 4) applying technical solutions to technical challenges and adaptive solutions to adaptive challenges, 5) being willing to compromise, 6) employing continuous self-reflection, 7) pacing the work through communication, and 8) building partnerships.

EXAMPLES OF COMMON PITFALLS IN LEADERSHIP

The examples that follow are some common pitfalls a leader may experience when developing systems of care. However, these are only a few of the many pitfalls a leader will experience as he or she leads a change initiative.

Personal Pitfalls

1. *Being a beacon of loss*: A leader stands out like a beacon of loss (Heifetz, 1994). As a leader moves an organization or multiple organizations in new directions, other initiatives may be left behind or become less of a priority for one or more of those organizations. Individuals who are committed to the prior efforts will experience a loss, sometimes resulting in individuals blocking or attempting to block the new direction. Some individuals may take this loss personally and attempt to make it a personal matter for the leader. Leaders need to be prepared for these challenges, to listen and talk with the

individuals who are experiencing this loss, and not take it personally. When a leader experiences criticism from within her own organization or from partner systems, she needs to remember the difference between one's self and one's role. (Heifetz, 1994). Leaders must remember that people will respond to the role they play and the perspectives they represent. Leaders must interpret the responses from these individuals in relation to the leadership role to gain a deeper understanding of different perspectives.

2. *Becoming a martyr:* Leaders will experience setbacks as they work to move an initiative forward. Forces much stronger than an individual, or even a team of individuals, can stop an initiative in its tracks (Heifetz, 1994). When this occurs, a leader may be tempted to become a martyr or “fall on his sword” in sacrifice for the mission, thinking if he makes a dramatic show he will be able to counter the forces attempting to end the effort. This usually does not result in moving the issue or initiative forward; it is likely to bring a quicker end. Jumping off the boat or shutting down the engine will not help it reach its destination.
3. *Using dictatorship instead of collaborative leadership:* One of the easiest personal pitfalls to avoid is taking a top-down approach rather than a collaborative approach. Building systems of care requires collaboration across systems and within systems, both vertically and horizontally, as well as with non-system partners, such as families and community leaders. Taking a top-down approach will meet with certain failure. It is hard to determine why so many leaders still take a top-down approach to leadership. This traditional form of leadership is often perceived to be the easiest to implement, but it yields the least favorable results. Top-down leadership resembles a dictatorship, where the person with the power makes all of the decisions and others simply follow the rules. Sometimes leaders have to use this approach, such as on a battlefield, but for most human service organizations a more participatory approach is recommended (Finzel, 1994). If a leader is using a top-down approach, she may be confusing leadership with management. A manager has subordinates and a leader has followers. Although both are positions of authority, a manager gets people to act because it is her job to do so, whereas people follow a leader because they want to follow her.
4. *Confusing passion with leadership:* Another common personal pitfall is confusing passion with leadership. This pitfall is common in systems of care, as family and youth leaders work to improve services in their community. Family members and youth are often very passionate about improving services and supports for children, youth, and their families. This commitment is visible when families and youth advocate for themselves and their families, share their stories, and offer suggestions to improve services and supports. The advocate, and his voice, may be well known on these issues, and he may

often be called upon to serve on collaborative committees and boards. The assumption made is that if he is passionate enough to make people listen to him, he must be a good leader. These family and youth are then put in positions of leading family and youth organizations, where they are expected to be managers, entrepreneurs, and great business leaders.

Passion coming from life experience can resemble leadership because people listen and sometimes follow. Passion reflects strong feelings and sometimes serves as a driving force for a leader. However, leadership is much more complicated than simply being passionate about something. Leadership involves building relationships, modeling the way and enlisting, enabling, and strengthening others to act (Kouzes & Posner, 2007). Passion and leadership are much different; passion alone cannot sustain a leadership position.

Passion drives people to become advocates for their causes. Advocates speak up and become the “voice” for what they believe. Families and youth generally do not want to give up their role in being the “voice” of change, but the community often expects them to lead the efforts and raise up others to carry the “voice.” Leaders need an overarching view and must have the ability to create distance to gain perspective (Heifetz, 1994). Gaining distance, or getting on the balcony, does not mean one has to lose passion; he or she just has to get a clear perspective. One can have passion without being a leader, but it is more difficult to be a leader in this work without passion. The best family, youth, and community leaders have both.

Organizational Pitfalls

5. *Not understanding organizational culture:* A leader may fall into a common pitfall by not taking the time to understand the culture of the organization or of its partnering organizations, by not understanding the way things are done and why they are done that way in an organization. Sometimes organizational culture is described as the unspoken rules of the organization (Finzel, 1994). These rules are the principles and values that drive the organization, and the leader must know them, know why they are important, and understand the ramification of not following them or changing them. *Merriam-Webster's Collegiate Dictionary* (1996) defines *culture* as “the integrated pattern of knowledge, belief, and behavior . . . the customary beliefs, social norms, and material traits of a racial, religious, or social group.”¹ Every organization has its own unique culture. A leader who misses or misreads the cultural clues will have limited success in helping lead that organization in new directions.
6. *Confusing technical challenges with adaptive challenges:* Leading finance work in systems of care requires a leader to have or acquire technical skills and use adaptive skills to align everyone's values before the technical work of

¹By permission. From *Merriam-Webster's Collegiate Dictionary* © 1996 by Merriam-Webster, Incorporated (www.Merriam-Webster.com).

blending or braiding funding begins (see also Chapter 5). For example, a leader must have some understanding of multiple federal funding (e.g., Medicaid, Title IV) rules and laws to successfully lead an effort to blend or braid funding across systems. A leader must also be aware of the underlying adaptive work that has to be done when working in the area of finance. As defined by Heifetz (1994), the adaptive challenge consists of a gap between the shared values people hold and the reality of their lives, or a conflict among people over values or strategy.

When working in the area of finance, one may experience an adaptive challenge described as a technical problem. For example, someone may say something can or cannot be done with Medicaid and everyone accepts that as a technical problem that cannot be overcome, or they fail to look into what may be the underlying adaptive issues. One or more of the individuals charged with blending or braiding funding may not want to blend or braid funding, allowing the situation to be defined as a technical problem, when in fact it is an underlying adaptive challenge.

Understanding major funding rules and laws is technical knowledge a leader will need if working in the area of finance to find ways around or through technical barriers. The leader must also listen for the adaptive challenge that may or may not be underlying the described technical problem. Such adaptive challenges may come up when one system or organization loses resources, such as when funding is redirected from residential care to community-based services, or when funding is reallocated and combined into one system. These are real losses to an organization or system and require creativity and adaptation.

7. *Experiencing changes in leadership:* Some pitfalls can be expected and prepared for. When a new leader comes into an existing organization, there are pitfalls that can be expected. It is especially challenging when an organization transitions from a founding leader of an organization to the next leader, even more so if the former leader left on good terms and was viewed as a successful leader. A new leader must know that many of the staff will be committed to the former leader and the way that leader operated. One pitfall to expect is that some staff may leave the organization because they cannot accept the change in leadership. The new leader needs to see this as a developmentally important process and not take it as a personal attack. Another pitfall to expect is that the staff may view any changes and new directions from the new leader as criticism of the former leader, even though this may not be the case. As a new leader in an existing organization, it is important to learn its history and cultural values and to build relationships within the organization before making too many major changes.

Another area of leadership change that one must prepare for is being promoted to leader from within the organization and going from co-worker and peer to boss. Such a new leader must deliberately change relationships with co-workers in a thoughtful way, managing those relationships and

making changes before problems arise. For example, as a co-worker, one may share work challenges and process conflicts with a friend at work. Once promoted to leader, these conversations must end, and it is up to the leader to facilitate the change in these relationships. These pitfalls can be expected during leadership changes, and a leader can be prepared to handle them and help others within the organization deal with the changes as well.

Environmental Pitfall

8. *Enduring economic changes:* Systems and organizations are constantly changing, perhaps from social changes, legislative changes, changes in political leadership, the death of a client, or economic changes in a state or community. Environmental influences often come from outside the organization and result in one or more organizations having to develop a response to these external influences. New services may have to be developed and implemented in response to legislation. Often the recommendations of a commission provide a strong enough external influence to require changes in a system or organization. Budget cuts or merging of departments or divisions within departments are common responses to economic changes in the environment. How a leader responds to these environmental pitfalls will vary depending on the external influence.

STRATEGIES FOR OVERCOMING PITFALLS

1. *Separating self from role:* Leaders need to be prepared to hear criticism and not take it personally. A good mental exercise for a leader to use when receiving criticism is to separate himself from the role and tasks at hand. This is not easy to do, because most leaders are very passionate about what they are trying to accomplish. However, it can provide some space and allow a leader not to take the action of others personally. It can provide the leader with just enough distance to look objectively at what he is trying to accomplish and get a fresh look at where he is going. Distinguishing self from role does not mean giving up emotions or passion for a goal and simply acting as if playing a role. Distinguishing self from role enables leaders not to take things personally and be misled by emotions. This provides leaders with the distance needed to objectively understand the issues that are being presented or discussed. Distinguishing self from role allows one to focus attention on the issues and not on the individuals involved (Heifetz, 1994).
2. *Creating distance to gain perspective:* Keeping perspective or gaining a new perspective about a change process requires a leader to occasionally stand back from her day-to-day activities and get a fresh look at what she is trying

to accomplish. It allows a leader time to back away from the day-to-day challenges or conflicts in the environment and reflect. It allows a leader to look for new directions or try new strategies, even if it is going to result in having to take a whole new direction that will require more time. A new perspective may require finding more or new partners from outside an organization, such as advocates to help increase the sense of urgency and need for change. It may require additional support from a boss or colleagues to combat a force that is threatening to end or stall an initiative. Heifetz (1994) referred to this as “getting on the balcony.” Others refer to it as getting out of the bushes or climbing a ladder (Covey, 1990). Regardless, it calls for creating distance to gain perspective.

3. *Using collaborative leadership:* A leader in systems of care must practice collaborative leadership. A collaborative leader offers the team the opportunity to give input before moving to a new course of action. A collaborative leader sees himself as a “facilitator” of the collaborative process. A collaborative leader can lead the charge but must also empower the team to lead the process. This means that a collaborative leader is willing to share information, power, and decision-making authority and involve partners in creating the plan. Building strong interpersonal relationships is a critical skill that a leader must master and use to bring other individuals along in a new direction. A leader is only as powerful as the group being led. If no one is following, then a leader is not leading. Individuals must want to follow a leader. There is a great leadership proverb: “If you think you’re leading and no one is following you, then you’re only taking a walk” (Maxwell, 1999, p. 5). Leaders must look ahead, back, and beside themselves as they are moving systems of care forward. A collaborative leadership approach is more likely to draw followers. People tend to follow a plan when they were involved in creating the plan, and they will be more invested in making sure the plan succeeds.
4. *Applying technical solutions to technical challenges and adaptive solutions to adaptive challenges:* Agreeing on a shared vision is critical to the success of any interagency initiative. When all of the partners can agree to a common vision, mission, goals, and outcomes, they can move forward together. Building a common vision helps align the values that different systems, organizations, and individuals bring to an interagency initiative. Aligning the values of these systems, organizations, and individuals is the adaptive challenge collaborative leaders face (Heifetz, 1994). The technical work of a collaborative initiative may include completing a study of the different laws or rules that influence certain policies or the various funding sources a group wants to use to serve the population of focus. A technical challenge may be gaining a deeper understanding of how certain funding sources are aligned

to affect a particular population and identifying how those funds can be moved from out-of-home care to support community-based care. Another technical challenge may be completing a finance matrix to study the various funding sources.

In the previous examples, the adaptive leadership work is aligning the values of the group and gaining consensus to support intensive community-based services instead of more restrictive care, such as residential care or hospitalization. The technical work requires individuals with special skills or practical knowledge in identifying the various rules or laws influencing the funding sources to determine if the funds can be shifted from restrictive care to community-based care and to determine the amount of funding available from each funding source. Strategies can be used to help minimize loss, such as helping a residential provider learn to provide intensive community-based services rather than residential care and entering into agreements that these organizations will be given the opportunity to bid on community-based contracts. Because of the concern of losing resources or control of certain funding streams, a leader must know when to use adaptive skills to make sure the values are aligned and when to use technical skills to accomplish a certain task. Even when stakeholders know they should work together to better serve a population of focus, technical pitfalls will arise and agreement on the common vision, mission, and values is critical to address the adaptive challenge. Understanding the difference between the adaptive and technical differences is critical (see also Chapter 5).

5. *Being willing to compromise:* In collaborative leadership, an individual leader will never achieve everything she sets out to achieve because a leader must be willing to compromise. This does not mean compromising personal values or principles, but it may require letting a few things go or delaying completion of some tasks to get an initiative started.

To illustrate, a leader (one of the authors) in a particular collaborative effort had three primary system partners—mental health, child welfare, and juvenile justice—and the leaders of those system were all committed to a common set of goals and outcomes. The goals were to maximize federal revenue, blend/braid funding to expand community-based services, and reduce the need for hospitalization and residential care with Medicaid as a key funding source. Two systems were initially able to blend and braid funding—juvenile justice and mental health. Having two of the three systems ready to blend/braid funding allowed for the development of a 1915(c) waiver. The child welfare system was not able to initially participate because of funding cuts. Leaders will not always get perfect alignment of all of the system partners and will sometimes have to compromise to move forward. In this illustration, the leader had a chance to move forward and build momentum with two of the three systems or wait until all of the systems were aligned. The leader chose to move forward with two systems, which allowed the initiative to continue

to build momentum and bring along the third system, child welfare, when its alignment was better.

6. *Employing continuous self-reflection:* A leader must be aware of self and continually evaluate what he is trying to accomplish. A leader must use self-reflection as a critical tool to both monitor what he is doing and feeling and monitor others to determine if they are moving forward with the initiative. The pressures of leadership are significant. A leader signifies loss as well as progress, change as well as stability. A leader must always look within and make any personal changes needed to continue to lead the team. This may require seeking feedback from individuals on the team or others outside of the team who are being influenced by the team. Since leadership involves trial and error, a leader has to listen to input after something has been tried, reflect upon it, and make adjustments to minimize errors the second time.

Listening to self and others is a critical skill leaders must exercise when leading an initiative. Reflecting upon self does not mean a leader has to do it alone. Leaders need coaches to help them reflect upon their behavior. A good friend or boss can help one see blind spots as well as strengths. It is similar to how a good therapist works with a client. Coaches, consultants, and good supervision can provide space for an individual to debrief and talk openly about what has occurred, reflect upon his behavior, learn, and move forward.

7. *Pacing the work and communication:* Pacing the work of change requires a leader to check in with the team and individuals in the organizations who are being affected by the change. Organizations and individuals can experience significant stress during efforts to change. Stress can come from the uncertainty of a new effort. There is a lot of trial and error in new initiatives, and individuals need to feel safe to make mistakes that are inherent in trying anything new. Stress can come from leaving the old and familiar behind or from the addition of new work while still doing much of the old work. Pacing the work gives individuals time to adapt to the new and make needed midcourse corrections. Pacing the work also allows individuals time to let go of the old and adapt to the new.

A leader may be seen as a threat to others as she moves an organization or multiple organizations in new directions. Communication is key to any change initiative regardless of whether the change is planned within an organization or in response to influences outside of an organization. A leader has to be willing to communicate as much information as possible and be willing to dig in and help out in any way necessary to support those being affected by the change. Predicting and communicating about the change helps individuals adapt to the new situation. Budget cuts can often be anticipated, and communicating details on such developments well in advance

helps soften the shock individuals may experience from the actions related to the budget cuts, such as layoffs or cutting of programs. Involving individuals in the decision making also helps them feel some control over a situation in which they may have little control. Teams can also help as an organization strategizes new actions it can take to adapt to new realities.

8. *Building partnerships:* Building systems of care requires a leader to work across multiple systems and with numerous partners to achieve a common goal or mission. In doing the collaborative work of system building, one has to engage in broad participatory planning and work with diverse groups of individuals and ensure that everyone is committed to the common vision. Sometimes this may include individuals and organizations very different than the “typical” collaborative partner. The following story is an example of building a partnership between two very different organizations. The story also highlights several of the other pitfalls and strategies covered in this chapter.

The National Federation of Families for Children’s Mental Health (NFFCMH), a family-run organization that focuses on offering support, education, and training to families raising children with mental health challenges, and the International Association of Chiefs of Police (IACP) needed to work together to improve the outcomes of police interaction with youth in a mental health crisis. The IACP organization appeared to be rigid, whereas the NFFCMH viewed itself as a very family friendly and flexible organization that allows family members to feel comfortable and supported in the process of working with police officers. The leadership structure of the NFFCMH was very different from that of the IACP. The IACP was a very top-down, hierarchical organization. Policies and procedures were strictly followed and obeying orders was critical. Everyone addressed each other with formal titles (e.g., Sergeant Walker, Chief Smith, Officer Dan). As a very family-oriented organization, the NFFCMH used a more collaborative type of leadership, with everyone on a first-name basis. Team building and collaboration are important values to the family organization.

A meeting was convened between the NFFCMH and the IACP to address the very serious issue of negative outcomes for young people in mental health crisis when police get involved. Some families became very angry and did not trust police officers. Other families reported they have watched their children be hurt, traumatized, or even killed by police officers whom they called on to help. Families have viewed police officers as lacking sympathy or understanding for the needs of their children. Police officers, on the other hand, thought that these were bad parents who did not teach and discipline their children when they were young, because if they had there would be no need for police involvement.

In the process of their work, the leaders of both organizations began to realize how much they had in common. Both the NFFCMH and the IACP honored at their national conferences those whom they lost each year. The police organization honored fallen police officers, and the family organization honored those lost by suicide or died as a result of their mental health disorder. The two ceremonies were very much alike. A joint summit of the two organizations, along with other supportive national organizations, held a shared ceremony honoring the lost of both organizations.

The NFFCMH and the IACP found common ground in the area of stigma and negative press. The police revealed that because the media only reported when a police interaction goes wrong, or on the wrongdoing of a few bad police officers, the public does not trust the police, and this puts officers at greater risk of losing their own lives or having to use deadly force more often. The families talked about the negative way the media portray people with mental health issues and how stigma keeps people with mental health issues from seeking help. In the process of building their partnership, the two groups began to find common ground. They wanted the same results or outcomes for their constituencies' safety. A mom said, "I just want my family to be safe and for my son to make it home after he has had an intervention with police." The police officer said, "My wife and kids want me to come home safe each night." This opened the door for the two groups to create a set of values, principles, and outcomes they could agree on, and thus work began to improve the outcomes of police responding to youth in mental health crisis. Finding common ground around values and outcomes proved to be the best way to build the partnership between two contrasting organizations.

SUMMARY

Leadership is about taking chances and being innovative. A leader tries new and different things and, as a result, is constantly running into pitfalls, most of which can be navigated around or through. A leader may experience personal, organizational, and environmental pitfalls. Regardless of the specific pitfall, a leader is constantly solving problems and helping align the values and vision of others. This chapter has described a few of the many pitfalls a leader may experience when developing systems of care. The strategies and stories are simply illustrations to help the reader gain a deeper understanding of some of the pitfalls he or she will experience. There are probably a thousand times as many pitfalls as have been described here and thousands of different strategies a leader could use to overcome or avoid them. The one mistake a leader cannot make is to stop trying new and innovative strategies and stop learning as he or she implements those new strategies. When a leader stops learning and taking chances, he or she is no longer leading; navigating through and around pitfalls is part of leading.

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