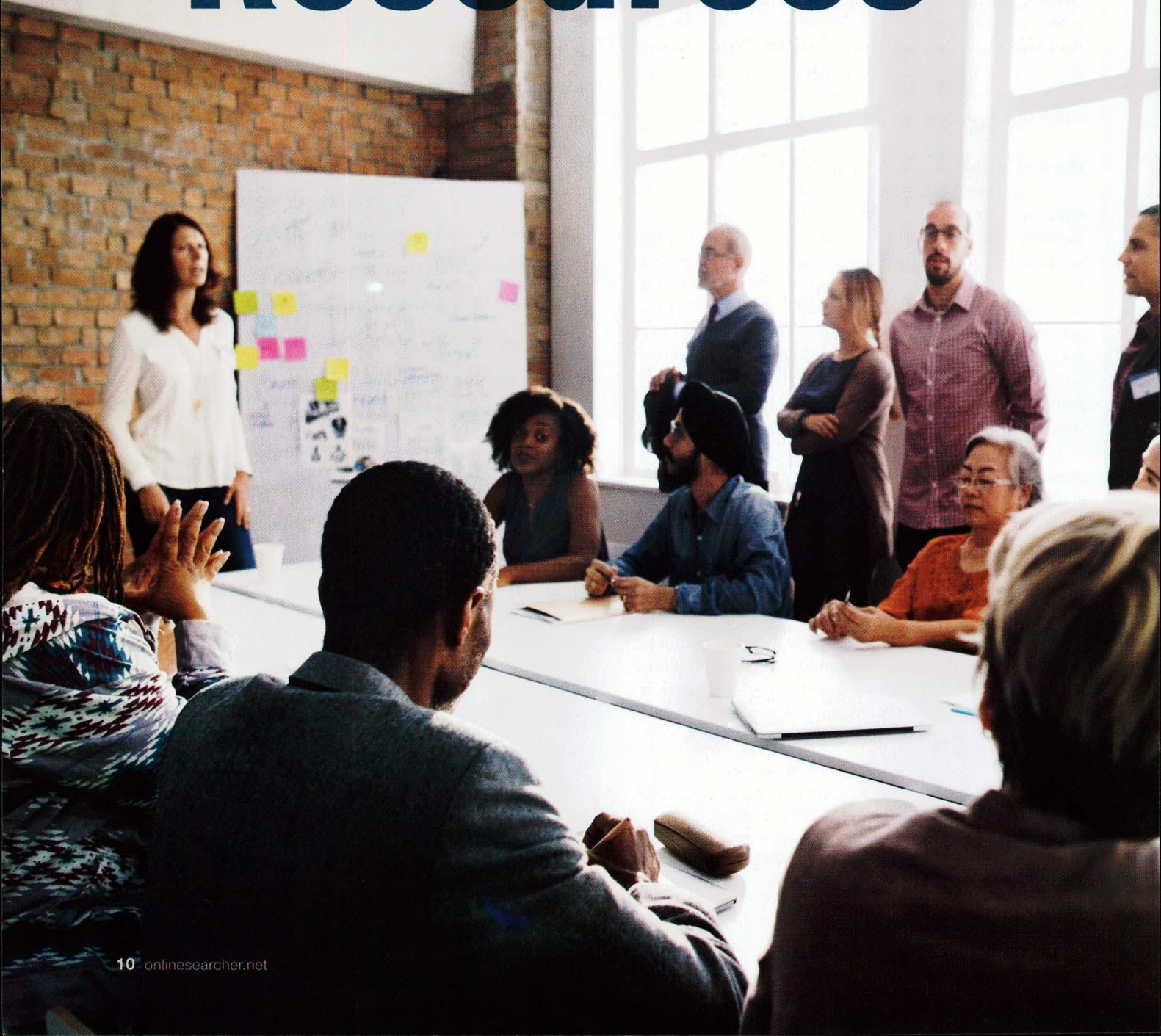


NONPROFIT Leadership Resources



By Jocelyn Sheppard

Suspect that the U.S. is home to a great many nonprofit organizations? You don't know how right you are. As of April 2016, the Nonprofit Center for Charitable Statistics reported that there are 1,571,056 tax-exempt organizations, including 1,097,689 public charities; 105,030 private foundations; and 368,337 other types of nonprofit organizations (nccs.urban.org/index.cfm). In 2010, nonprofits accounted for 9.2% of all wages and salaries paid in the U.S., and in 2014, the nonprofit share of the Gross Domestic Product (GDP) was 5.3%.

Nonprofits are important in the aggregate, but what does this mean on a more local—and personal—level? When we attend school, enjoy leisure activities or cultural enrichment, worship, receive medical services, or do volunteer or even paid work, in most—if not all—of these instances, we're interacting with nonprofit organizations. It's hardly surprising, then, that we're inclined to say "Yes" when we're invited to join the board of a nonprofit—even before we know exactly what serving on a board will actually entail. What is this thing they call "governance" or "leadership"?

Many nonprofits ask themselves the same question. The reasons for asking vary, but typically involve people, personalities, and financial resources (or the lack thereof). In one scenario, the board has relied on the leadership of an effective and charismatic founding executive director who is now preparing to retire. In another organization, the executive director and the board chair have competing ideas about what leadership should look like. Social or economic changes that pressure the organization to raise more money, change direction, or perhaps even close its doors present challenges that the board and executive director feel ill-equipped to address.

To ensure the legal, ethical, and financial health of the organization, the nonprofit executive director, board chair, and board members must engage with a range of often complex issues, including these:

- Establishing or clarifying the organization's mission, vision, and values
- Formulating a sound strategic plan

- Conducting an organizational assessment
- Managing an executive transition
- Recruiting and compensating a new executive director
- Evaluating board member and executive director performance
- Evaluating board structure, policy, and practice (including board recruitment)
- Growing and strengthening the development (fundraising) function
- Evaluating new programmatic, partnership, and funding opportunities
- Maintaining the balance of power between these stakeholders

This can be a daunting roster of responsibilities, particularly when you consider that the majority of board members are unpaid volunteers who may be entirely new to board service of any kind—or they may possess an entrenched view of how the nonprofit should operate.

Whether working with novice or deeply experienced board members, the executive director and board chair have recourse to a constellation of board leadership and governance resources. Many of these resources are free; others require membership (often in organizations it makes sense for the nonprofit to join) in order to access resources; while others sell information products or offer consulting resources on a fee-for-service basis. More often than not, these organizations offer a mix of free and fee-based goods and services.

GENERAL RESOURCES

The Internal Revenue Service (IRS) determines nonprofit, tax-exempt status in the U.S. The agency's Charities & Nonprofits webpage (irs.gov/Charities-&-Non-Profits) provides links to official guidance documents, educational and training resources, and statistics on tax-exempt organizations. The majority of tax-exempt organizations are required to file annual Form 990 returns, a good source of information about the organization's financial health, programmatic activity, executive compensation, and major sources of revenue.

While much of this information may also be available on the nonprofits' own websites (look for links to the organizations' recent 990 filings and annual reports), a free, one-stop online tool for locating 990s is the Foundation Center's 990 Finder (foundationcenter.org/findfunders/990finder). This site also offers assistance in deciphering the various types of 990 filings.

The National Center for Charitable Statistics bills itself as the national clearinghouse for data on the nonprofit sector in the U.S. The Center publishes a variety of summaries, top 10 lists (e.g., Largest Public Charities by expenses, total assets, and net assets), and research reports, including one titled "The State of Nonprofit Governance" (September 2014).

LEADERSHIP BEST PRACTICES RESOURCES

Best practices. Recommended practices. Guidelines. They can be a rich resource for a solidly performing organization, or a lifeline for a nonprofit dealing with governance, leadership, financial, or other types of crises. Nonprofit leaders and managers have several types and sources of best practices from which to choose.

BoardSource (boardsource.org) is a membership organization specializing in board governance best practices and leadership development. BoardSource hosts an annual leadership forum, hosts a LinkedIn group, and provides customized training. It publishes books, toolkits, and workbooks on all aspects of leadership, including bylaws development and understanding the role of the board in nonprofit governance. Its book, *Ten Basic Responsibilities of Nonprofit Boards* (\$44), is a frequently cited resource. Content is available to members only. Dues are \$199 (1 year) or \$349 (2 years) for individuals/consultants and range from \$500 to \$2,500 for organizations, depending on their annual budget size.

Independent Sector (independentsector.org) describes itself as "the leadership network for nonprofits, foundations, and corporations committed to advancing the common good." Independent Sector recommends that its *Principles for Good Governance and Ethical Practice* (2007, updated in 2015) "should be considered by every charitable organization as a guide for strengthening its effectiveness and accountability." A summary of the 33 principles is available as a free download.

The Standards for Excellence Institute (standardsforexcellence.org) publishes "Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector," which it promotes nationwide (several individual U.S. states have ad-

opted these standards for statewide use). The code provides benchmarks and measures across a range of nonprofit governance and management topic areas. Nonprofits can opt to go through the certification process or may simply choose to purchase the *Standards for Excellence Codebook* (\$10) and the *Board Excellence Handbook* (\$40) for their own organizational assessment process. The Institute also offers the code as a free app.

OTHER LEADERSHIP AND GOVERNANCE RESOURCES

An informal poll of several nonprofit executive clients and some of my fellow nonprofit consultants resulted in the following recommendations—a mix of magazines, blogs, and podcasts.

The mission of the American Society of Association Executives (ASAE; asaecenter.org) is to help associations and association professionals transform society through the power of collaboration. An important part of this mission centers on providing a forum and tools for strengthening (nonprofit, tax-exempt) association leadership and management. While some ASAE content is free, most is available with paid individual and institutional membership.

Blue Avocado (blueavocado.org) is an online magazine geared toward nonprofit communities. Editor Jan Masaoka and guest authors contribute thoughtful, practical content that reflects both deeply lived experience and a healthy sense of fun and humor. Recent leadership-relevant postings include "Who's the Boss? The Board or the Executive?" and "A Nonprofit Dashboard and Signal Light for Boards."

The screenshot shows the Foundation Center's 990 Finder search page. The header includes navigation links: Home, Profile, Search, Site Map, Ask Us, About Us, Locations, Newsletters, Press Room, and PND. A 'DONATE NOW' button is also present. Below the header, there are links for 'Get Started', 'Find Funders', 'Gain Knowledge', 'View Events', and 'Shop'. The main content area is titled '990 Finder' and includes instructions on how to use the search function. It features a search form with fields for 'Organization Name', 'State Code', 'ZIP Code', 'EIN (no dashes)', and 'Fiscal Year'. There are also radio buttons for 'Both', '990', and '990-PF'. A 'Find' button is at the bottom of the form. To the right of the search form, there is a sidebar with links for 'Fact Finder', 'Identify Funding Sources', 'Related Tools', 'Check Statistics', and 'Local Resources'. At the bottom right, there is a 'GRANTSPACE' logo and a 'Nonprofit Collaborations' section with a 'Learn more >' button.

The Foundation Center website search boxes let you search for 990 tax returns for nonprofit organizations along with information to help decipher elements in the filings.

The Bridgespan Group (bridgespan.org) is a consulting firm organized as a 501(c)(3) organization to advise social sector nonprofits and philanthropists on practical strategies to “help scale impact, build leadership, advance philanthropic effectiveness, and accelerate learning.” Bridgespan publications, such as “How to Develop Yourself as a Nonprofit Leader,” are available as free downloads. Bridgespan also hosts several discussion groups on LinkedIn.

A colleague recommended the Center for Creative Leadership (CCL; ccl.org/Leadership/index.aspx) for its emphasis on students and young professionals who want to transform passion into leadership practice. As he put it, “This one is great for us older folks to stay grounded to what or how our nonprofit field is changing.” CCL products and services include assessment tools, training, and coaching. CCL also funds behavioral science research projects on leadership and related topics.

The Chronicle of Philanthropy (philanthropy.com) is a monthly digital and print publication whose coverage includes nonprofit management and leadership. Additional online content includes webinars (e.g., “Get the Most Out of Your Board”) and podcasts (e.g., “How to Create a Path for Effective Leadership”). Access to some news content is free; a subscription costs \$79 (1 year) or \$135 (2 years).

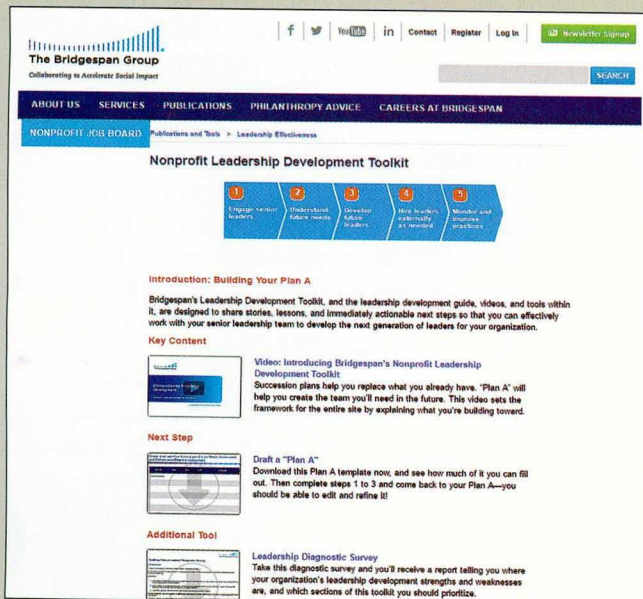
Harvard Business School Working Knowledge (hbswk.hbs.edu) is a forum for innovation in business practice featuring research and thought leadership from HBS faculty. Content types include case studies, op-eds, research summaries, solicitations of reader opinion, and working paper summaries.

Forum content is free and keyword-searchable. Searches on the terms “Leadership,” “Governance,” and “Management” produce numerous results.

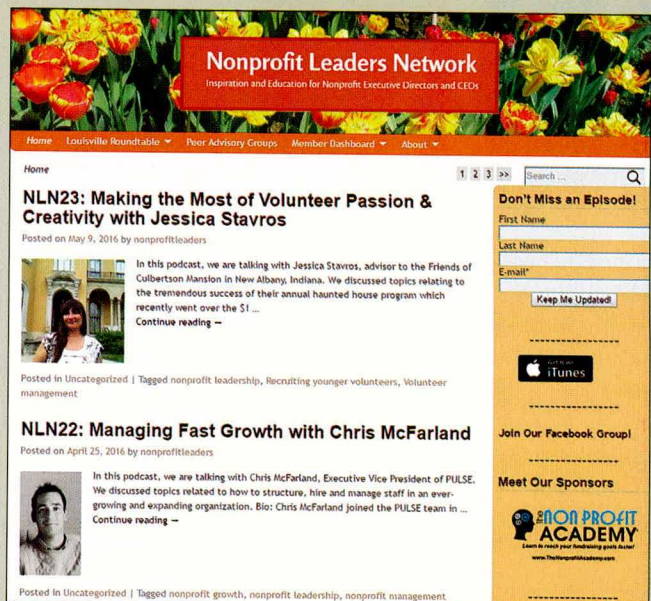
The mission of the Leadership Learning Community (LLC; leadershiplearning.org) is to “advance a more just and equitable society by transforming the way leadership development work is conceived, conducted and evaluated. We believe that promoting leadership as a process that is more inclusive, networked and collective will have a greater impact in advancing equity.” To this end, LLC hosts learning circles, learning labs, and webinars and publishes program materials, evaluations, meeting notes, scans, reports, guidelines, and learning reflections as well as links to videos, images, and other websites relevant to the field of leadership development.

Hosted by fundraising consultant, speaker, and author Kirsten Brondsted Bullock, the Nonprofit Leaders Network (nonprofitleadersnetwork.com) podcasts feature nonprofit executive directors and CEOs describing what’s working for them. As my colleague who recommended the series stated, “The shows are tightly focused deep dives on a leadership issue clearly identified in the show title. For example, ‘Vision and Board Communication’ is about exactly that.”

The National Council of Nonprofits (councilofnonprofits.org) provides a map of its state associations and allies, which is useful for locating state-level organizations that provide communities of interest and practice and information resources for individual nonprofits in that state or region. The Council of Nonprofits also provides tools, resources, and samples for



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Beyond the Northern Border

Two Canadian information resources come highly recommended.

CharityVillage (charityvillage.com) offers a rich repository and channel for news, "how-to" articles, job postings, and volunteer opportunities for the Canadian nonprofit sector. The Management section includes a variety of articles on leadership.

The aim of **Sector Source** (sectorsource.ca) is "to provide a single location for charities and nonprofits to access selected professional material about managing, developing and overseeing their organizations." Resources include toolkits, research studies, current news, and training programs. Sector Source also acts as a knowledge support system and tool for the Imagine Canada Standards Program.

nonprofits wishing to strengthen leadership, governance, advocacy, fundraising, and other organizational components.

The Nonprofit Quarterly (NPQ; nonprofitquarterly.org) is a well-regarded source of news articles, features, editorials, and case studies. Specific areas covered include strategy, resource management and generation, governance, and leadership. Its content is useful for people who track the sector, as well as for practitioners seeking new ideas and demonstrated practices. NPQ webinars include such leadership-relevant topics as "Nonprofit Governance's New Frontier: Empowered and Connected Stakeholders" and "The Completely Revised Guide to Great Board Recruitment." The magazine is sold in 1-year (\$59), 2-year (\$99), and 3-year (\$139) subscriptions.

The NonProfit Times (nptimes.com) showed up in several responses to my straw poll. Billing itself as the leading busi-

ness publication for nonprofit management, it publishes a monthly magazine, a free weekly newsletter, and a variety of moderately priced guides (e.g., "52 Tips About Nonprofit Boards," "52 Tips About Nonprofit Management"). *The Non-Profit Times* magazine is available in print or digital format; the latter costs \$19.95 for 1 year, \$29.95 for 2 years, and \$39.95 for 3 years.

Don't be put off—or fooled—by its name: Nonprofit with Balls (nonprofitwithballs.com) is a free weekly blog that many consider a must-read for its insights into the world of nonprofits striving to make a difference—without sacrificing their integrity or sanity. Author Vu Le, executive director of the Rainier Valley Corps in Seattle, writes with humor, compassion, and passion. Start with "The Downward-Facing Budget and Other Nonprofit Yoga Poses" and work your way up to the recent "Why Organizational Values Are So Awesome and Sexy" to discover a unique and authentic voice for enlightened nonprofit leadership and governance.

Nonprofits Are Messy (joangarry.com/category/podcast). Indeed. The domain of nonprofit consultant and author Joan Garry, each podcast episode and elegantly written blog posting addresses a specific aspect of nonprofit development (e.g., becoming a great executive director, board leadership) with humor and a clear point of view. (As of this writing, Ms. Garry's website proclaims that Nonprofits Are Messy is the No. 1 nonprofit-centric podcast on iTunes.)

One of my colleagues refers to the *Stanford Social Innovation Review* (ssir.org) as "the *Harvard Business Review* of the nonprofit world." *SSIR* explores innovative ideas to help leaders of nonprofits and nongovernmental organizations work more effectively, doing so with a blend of rigor and accessibility suitable for practitioner and academic audiences. In addition to its quarterly publication, *SSIR* sponsors live in-person events, webinars, and podcasts, with the latter available at no charge. Subscriptions are available for 1 year (\$49.95), 2 years (\$84.95), and 3 years (\$109.95).

VALUE OF NONPROFITS

Nonprofit organizations strive to advance our economic, social, professional, aesthetic, spiritual, and other forms of communal well-being. For these organizations to achieve their missions, they need strong, engaged leaders who truly understand their roles and responsibilities and the best ways to go about fulfilling their leadership obligations.

They will need this knowledge well in advance of the first time something threatens to go wrong—and that *will* happen, even to the most capable of leaders. With that in mind, those relatively new to board governance and leadership—as well as those wishing to understand the ways in which nonprofit leadership is growing and evolving—will appreciate the rich online resources available to them.

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