



GiveSmart

Donor Decision Tool

How to Research a Nonprofit's Leadership—Deep-Dive Approach

Collaborating to accelerate social impact

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Learning about a nonprofit's **leadership** will reveal whether the executive and management team are able to guide the organization effectively. You'll gain a sense of the strength of the leadership team, where it may need to develop and whether the leaders can maintain focus and make tough decisions when necessary. Additionally, you'll check on some factors that are critically important to a nonprofit over the longer term (and may also have a great bearing on how your support will be received), such as whether there is a succession plan for key people, and whether the board is effective, engaged, and aligned with the leadership team.

It's easy to see why leadership is an important part of whether funders decide to support an organization. When researching an organization's leadership, it is important to look beyond the vision and passion of the leader. In addition to being able to communicate a vision, a strong leader must develop and execute an effective strategy, demonstrate wisdom and knowledge, and inspire a team.

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Put simply, many nonprofits are “**strongly led but under-managed.**” Nonprofit leaders are often genuinely inspirational figures, passionate about their work and, in many cases, driven to extend their positive influence into adjacent realms. Their power to set compelling visions, motivate followers, and build cohesive cultures is amazing. Some tend to fall short, however, when it comes to critical management activities, such as translating their visions into clear organizational priorities, providing employees with performance feedback and developing future leaders, and defining clear decision-making roles.

Why the imbalance? One major reason is that nonprofit leaders typically come from the fields in which their organizations are engaged: community development, for example, or child welfare. Their resumes usually don't include management experience in organizations other than their own.

And the environment in which they work reinforces visionary leadership at the expense of management discipline. Passion, coupled with the ability to make a compelling case for a cause, drives fundraising and enables leaders to attract and motivate staff and volunteers. Even when they possess management skills, nonprofit leaders are seldom recognized or rewarded for their managerial qualities; however, and are often pulled toward other priorities.

Guide to nonprofit board assessment

Part of researching nonprofit leadership will involve looking at how well the board contributes to the nonprofit, since the board has a part in leading the organization. Members of nonprofit boards are typically passionate champions of the organizations that they serve. After all, they freely donate their time, skills and, usually, money to the cause.

You may find that you need to work with the board to fulfill your philanthropic vision. Researching the board will help you decide if that sort of collaboration will be possible.

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To begin looking into the board, start with secondary sources. Don't underestimate the amount of information you might get from a simple scan of the organization's website. Board member bios will reveal areas of expertise. Does the board seem to be mostly focused on fundraising? Have the directors

been serving for a long time? In addition, you could request minutes from a recent board meeting to get a sense of how the board operates.

The list below offers a starting set of criteria that may help you identify a board's strength. For more detail, see BoardSource's [The Source: Twelve Principles That Power Exceptional Boards](#).

- Board has clear structures in place that enable it to function effectively.
 - Board performs its basic fiduciary responsibilities (for example, participates actively, is attentive to the mission, provides financial oversight, ensures legal compliance, evaluates the organization's leader annually, etc.).
 - Board brings in fresh perspectives through planned board member turnover, based on established criteria and processes for recruiting new members.
- Board maintains a positive working relationship with the executive director and senior management.

- Board chair and executive director share a common vision for the nonprofit.
- Board has established processes for making decisions in collaboration with the executive director.
- Board acts as a mentor and sounding board for the executive director.
- Board is a net contributor to the organization.
 - Board offers skills and expertise that are valuable to the organization (could be content expertise, strong community connections, strategic thinking, or something else of particular relevance to the organization).
 - Board participates in fundraising and generating strategy.
 - Board's decision-making process actively propels the organization forward rather than hindering growth and progress (for example, the time and effort that goes into making decisions seem appropriate to the stakeholders involved, the tone of decision-making is positive, the executive director feels that the board is helpful and thought-provoking, etc.).
- Board seems connected to the organization and its work beyond the boardroom.
 - Board members speak knowledgeably and compellingly about the organization and its goals and programs.
 - Board members willingly engage with the organization outside of board meetings and are happy to speak with potential donors or attend occasional events.

You may want to speak with the executive director or a member of the board (or both).

Personal interviews

You may find that secondary sources do not give you the amount of information you need. You may want to speak with the executive director or a member of the board (or both). Meeting with the executive director of an organization you're hoping to support can provide insight into how he or she thinks about challenges, how you could support the organization, and whether there's potential to build a strong working relationship. Talking, even briefly, with a board member can reveal how the board operates and how receptive its members are to input and new ideas.

Additional Resources

Interview Guides

For information on how to conduct an in-person interview, see:

- [“Guide to Interviewing a Nonprofit Leader”](#)
- [“Guide to Interviewing a Member of the Nonprofit Board”](#)

Nonprofit Boards

For a comprehensive set of resources on nonprofit boards, including 12 principles of exceptional board governance, visit [BoardSource](#), an organization dedicated to building effective nonprofit boards.

Leadership Challenges

For more on the leadership challenges of the nonprofit sector see:

[“The Nonprofit Sector’s Leadership Deficit”](#)

A white paper based on Bridgespan research that reveals a significant gap between available leaders and the number of leaders that will be required over the next decade

[“Strongly Led, Under-managed”](#)

An explanation of why the nonprofit sector tends to visionary leadership at the expense of management discipline

[Good to Great and the Social Sectors: Jim Collins on Leadership](#)

Thoughts on the nonprofit sector by the noted business author

SOURCES USED FOR THIS ARTICLE:

- [BoardSource](#).
- Thomas J. Tierney and Joel L. Fleishman, *Give Smart: Philanthropy that Gets Results*, (Public Affairs, 2011).
- Daniel Stid and Jeffrey L. Bardach, “[Strongly Led, Under-managed](#),” The Bridgespan Group, August 2008.