



WASHINGTON NONPROFITS

WE MAKE SURE NONPROFITS HAVE WHAT THEY NEED TO SUCCEED.

Executive Learning Needs Assessment Summary: How can we best serve Executive Directors?

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Background and Current Offerings

Washington Nonprofits' mission is to make sure nonprofits have what they need to succeed. During strategic planning in 2018, we recognized that in addition to providing basic and intermediate education to nonprofit staff and volunteers, providing advanced learning opportunities and support to senior staff would strengthen the sector.

In the past, some advanced offerings have been integrated into our learning program. For example, we have partnered with Scott Shaffer to offer a full-day workshop on "Strategic Financial Management for Executives" in Seattle and Spokane. We offered a full-day workshop on "Leadership for Equity" as a deep dive prior to the 2019 Washington State Nonprofit Conference. We have also incorporated more conference sessions on "advanced" topics at the Washington State Nonprofit Conference. These workshops have been well-received.

In addition, we piloted an Executive Director Coaching Program in partnership with the Community Consulting Project, providing free pro bono coaching to 14 executive directors from member organizations in late 2018 and early 2019. This program was well-received and valued by the EDs who participated. We started a second round of coaching in Winter 2020 for EDs outside King County.

Listening and Learning

This has also been a year of listening and learning to better understand what nonprofit executive directors need and want in terms of leadership development and support. Our listening has included:

- A needs assessment completed for the Leadership Development Partnership in 2018 based on interviews with nonprofit leaders from under-represented populations—people of color, rural residents, immigrants and refugees and LGBTQ people (*Lifting Up Diverse Leaders: Leadership Development Partnership Priority User Needs Report*)
- A survey of our members in Fall 2019
- A survey of other capacity builders in Fall 2019
- Interviews with over 30 EDs over the course of 2019

- Soliciting feedback on a concept paper from our board and a number of EDs
- Evaluation survey for ED Coaching Program
- Participation in community conversations related to nonprofit leadership

This direct listening is complemented by reading new research such as Race to Lead reports, employment research and leadership-focused articles in leading publications.

Key Learnings

EDs are diverse and are seeking different types of professional development and support. No one “solution” has presented itself a clear next step to reach a large number of EDs. There are some principles that have emerged that can guide our work in the future:

- The ED job is difficult, overwhelming and can be isolating. Many EDs feel perpetually overloaded and have difficulty getting away from their office for reflection, strategic thinking and creative collaboration. This is a result of chronic underfunding in our sector, a systemic issue, rather than personal shortcomings.
- Because of the challenging nature of the ED job, any offering must be compelling to get EDs’ attention and convince them to take time away from the work they are so dedicated to.
- EDs have different challenges, learning needs and support needs at different stages of their career. New EDs need information to fill in knowledge gaps, time management strategies, management advice, mentoring and confidence boosting. Veteran EDs are more interested in peer-to-peer learning from others running similar sized organizations and tackling topics like advanced collaboration, managing change, complexity, and other adaptive challenges. They are seeking a space where they can be vulnerable and in learning mode.
- EDs of color and others that come from historically underrepresented or marginalized communities face oppression, stereotyping, greater difficulty accessing funding, and other challenges that add more layers of challenge to an already difficult job. As a community, we need to make an effort to support them in ways they identify as helpful.
- Leadership development can’t be limited to traditional classes, workshops and conferences. EDs are looking for mentoring, coaching, thought partnership, authentic partnerships and supportive space for meaningful dialogue and problem-solving.
- Younger EDs are seeking to do the job in a different and more sustainable manner. There are generational differences that need to be acknowledged and discussed, and we must avoid judging those who are approaching the ED job in different ways.
- Many EDs light up at the idea of a retreat that is nurturing and would give them a chance to unwind with peers, practice self-care, reflect and renew.
- Many EDs are painfully aware of the shortcomings of the nonprofit model and intrigued to participate in discussions about how to reinvent nonprofits and transform our sector and our relationships with government and philanthropy.

Key findings from *Lifting Up Diverse Leaders*:

- Current leadership development programs are not reflective of the diversity of community and nonprofit leaders in the field.
- Racism, ageism and geography impact people’s access to leadership learning opportunities.
- Underrepresented community members are ready to lead but are held back from formal leadership positions by a number of barriers.
- Mentoring and learning by doing are preferred ways to gain leadership knowledge and experience among the priority users we interviewed.
- A range of solutions, from informal network building and mentoring to formal leadership programs, is needed to develop leadership in Washington state.
- The new Learning Connections online catalog will be used more by underrepresented communities if the roll-out includes targeted outreach and relationship building with these communities.

Additional Comments

This next section documents some of the specific suggestions and comments we received from EDs.

Program elements

- Fellowship
- ED’s work is not always clearly understood. EDs need to toot their own horns.
- Understanding change and how it happens/how to lead it
- How to have transparency and accountability
- Retreat format
- A chance to talk with other EDs and network to address isolation and being the “holder of secrets.”
- Share what works
- Connection with a select group with similar interests
- Think tank
- CEO Breakfast
- Need to incentivize professional development

Characteristics

The following characteristics were suggested as success factors for an ED program.

- Cohort-based
- Leadership not management focus
- Asset-focus
- Trauma-informed approach
- Safe space for hard conversations
- Peer-to-peer learning and exchange
- Relational/allows for formation of trusting relationships
- Has to be size dependent: Challenges of larger orgs vary from smaller orgs.

- Have an “equity threshold” for participation

Topics that EDs are interested in

- Trust-building
- Managing growth
- Multi-year budgeting
- How does my leadership need to evolve?
- DEI/institutional racism
- Working with the board of directors
- Support to change and grow
- Time management
- Government and philanthropic partnerships
- Collaboration
- Community engagement
- Conflict resolution
- Combatting burnout
- Servant leadership
- Mentoring
- Working across sectors
- Preparing for a recession/dealing with budget cuts
- Adaptive leadership
- Systems thinking
- Self-awareness/well-being/presence
- Focus on strategy, vision, fundraising

Comments regarding equity

- The program needs to include racial diversity.
- Program leadership should include Black, Indigenous, People of Color (BIPOC) leaders.
- Some White leaders request a space where White leaders seeking to build up power and capacity of non-white leaders have a space to brainstorm, share challenges, and support this work.
- BIPOC EDs have distinct concerns and need the opportunity to caucus.
- To expand diversity, you may need to sponsor individuals to attend, while others pay their way.

Serving EDs statewide

How do we not make this a Seattle-centric activity?

- Use previous listening tour report to identify regional issues/concerns from around the state
- Host at a location outside Seattle
- Reserve a certain number of spots for non-Seattle based EDs
- In rural areas:

- EDs are often called on for additional community leadership roles. One example is long-term fire recovery efforts in North Central Washington. Another is a community effort to save a local radio station.
- Everyone wears many hats (nonprofit ED, elected official, small business owner, Rotary or chamber leadership, etc.).
- Collaboration is very strong and necessary.
- Eliminate travel
- Offer small snippets

Transformation

- Catalyze conversations around topics like inequity, philanthropy and accountability, nonprofit industrial complex or revolution will not be funded.
- Being able to process, digest and then brainstorm to address how the sector can shift/move through this to a different model would be great. Those who are thinking along these lines should be facilitators, guest speakers, hosts, etc.
- Chance to think together about how to improve the nonprofit model to be more sustainable, offer better staff compensation and work environments, etc.

CEOs of larger organizations

- What components are needed to increase relevance for EDs at large organizations?
- I would need it to be pretty high level.
- I participate in a national housing organization that convenes CEOs twice a year.
- I would value being a part of a cohort of like scaled organizations.
- Larger orgs (75+ staff) have a budget for this.
- Most of the larger nonprofits are affiliates of a national group with some support resources coming from that.

General Comments

- For me, it is less about reading the latest article on open offices (although I read those) and more about continuing to improve my understanding of humanity. You know, liberal arts.
- As I read, I thought: Wow, this would combine some of the elements of TableTalks and Vu's happy hours and 501 Commons' ED breakfasts, so that a person wouldn't have to cobble all of that together (which is what I do).
- Having something that is lower barrier than NELI is intriguing.
- Nonprofits seem to be a training ground and people move on. Lots of turnover in leadership roles. How can we retain people?

What else is available for EDs?

The following resources were mentioned as other supports currently available to EDs (this is not an exhaustive list, just a few that were highlighted by our interviewees).

- Joan Garry's group (online)
- ED Happy Hour Facebook group

- Eastside ED group, South King County ED Forum
- ED Round Table in Bellingham
- Murdock Trust offers small nonprofits leadership retreat (Spokane)
- Horizons Leadership (special initiative some years ago that sparked great outcomes in rural parts of Washington State)
- Local leadership programs (Leadership Spokane, Leadership Kitsap, Leadership Tomorrow, etc.)
- University of Washington's Nonprofit Executive Leadership Institute (NELI)
- 501 Commons' quarterly Executive Director Forum
- JustLead
- TableTalks (Janet Boguch)

Conclusions and Next Steps for 2020

Washington Nonprofits seeks to develop programs that are responsive to the needs of nonprofits in Washington. Moving forward, we will consider this input and solicit additional input from EDs to ensure that our executive programs are valuable and relevant. While no single program will serve everyone, two possible offerings rise to the top based on the input here:

- Retreat with opportunities for renewal, affirmation and relationship building
- Forum for conversation about nonprofit transformation

In 2020, Washington Nonprofits will experiment with new offerings for EDs to see what resonates. In Spring 2020, we are planning:

- A workshop session at the 2020 Washington State Nonprofit Conference designed for EDs only and focused on sparking a conversation about how we can improve nonprofits to be more sustainable and effective.
- A one-day gathering for Black, Indigenous, People of Color (BIPOC) EDs, held adjacent to the Washington State Nonprofit Conference. This pilot could be repeated for EDs of all races in the future.

Feedback from these programs will guide our planning for Fall 2020 and beyond.

We have also continued to expand our "advanced" offerings via workshops and webinars. For the first half of 2020, in addition to presentations of our core curriculum of Boards in Gear, Finance Unlocked for Nonprofits and Let's Go Legal, we will offer:

- It's Your Turn: The Role of the Board Chair (Online series, Jan. 30-Feb. 20)
- Is Unresolved Conflict Negatively Impacting your Nonprofit? (Online, Feb. 5)
- Strategic Planning in Nonprofits (SPiN) (Online series, Feb. 27-Mar. 26)
- Stakeholder Engagement (Online, March 4)
- Coaching Skills for Supervisors (Online series, Mar. 5-12)
- Nonprofit Leadership Succession (Online series, Mar. 11-25)
- Supervision Roundtables (Online, Mar. 19-Apr. 23)
- Board Leadership: What you need to know to do the job and achieve your mission (Moses Lake, Mar. 20)

- Strategic Partnerships and How to Create Them (Spokane, Apr 9)
- The Leadership Lab: Action, Practice and Improv (Sequim, Apr. 30)
- True Program Costs and Innovation in Financial Strategy (Deep Dive workshop, Bellevue, May 19)
- Interim Executives Academy, Pasco, May 28-29)
- Conducting a Board Assessment (Online, Jun. 4)

In addition, the Executive Director Pro Bono Coaching Program in collaboration with Community Consulting Project will serve an addition 14 EDs in Winter-Spring 2020.