

The State of Leadership Development:

An exploratory study of social service charities in Alberta and Saskatchewan

May 2010



HR Council for the Nonprofit Sector

The HR Council takes action on nonprofit labour force issues.

As a **catalyst**, the HR Council sparks awareness and action on labour force issues. As a **convenor**, we bring together people, information and ideas in the spirit of collaborative action. As a **research instigator** we are building knowledge and improving our understanding of the nonprofit labour force.



Contents

Introduction	1
Background	2
Approach taken for the study	5
Key findings from focus groups	7
Findings from educator interviews	18
Observations about the findings	19
Considerations for further action	23
Bibliography	25
Appendices	27

1 Introduction

Clearly there is more work to be done to clarify our collective thinking about leadership in the sector, to engage more stakeholders and to move towards testing some possible solutions.

This report presents the findings of an exploratory study commissioned by the Muttart Foundation to gain additional insights about the state of leadership and leadership development in small and mid-sized social service charities in Alberta and Saskatchewan. The study's focus was largely on the senior paid position.

The HR Council for the Nonprofit Sector led this study. It is a national nonprofit organization that addresses labour force issues in the sector in Canada. There are some 69,000 nonprofit organizations with paid employees in Canada. This would include but is not limited to charities. Seventy-five percent of those organizations have less than 10 employees and most have an executive director, manager or coordinator assuming the very important role of leading and managing the organization, under the delegated authority of a board of directors. It is estimated that there are 7,632 organizations with paid staff in Alberta and 3,126 in Saskatchewan (Statistics Canada, National Survey of Nonprofit and Voluntary Organizations).

The work of the HR Council is only as relevant as its ability to connect to the real people doing these real and demanding jobs. With 69,000 organizations, it is virtually impossible to get to them all, but this project was a valuable opportunity to connect with senior managers, to hear their concerns and to reflect on what they have said. Although the project was focused on small and mid-sized social service charities in Alberta and Saskatchewan, it is likely that the results would be much the same if a similar study had been undertaken in other provinces. The findings have reconfirmed some of the HR Council's thinking about the challenges and possible solutions—they have also caused to bring into question some long-held assumptions.

This report describes the background to this study, the approach taken, key findings, observations about the findings and some considerations for further action. It was deemed to be an exploratory study, an initial inquiry into the state of leadership and leadership development, therefore it should not be misconstrued to be a piece of academic research. Clearly there is more work to be done in this area to clarify our collective thinking about leadership in the sector, to engage more stakeholders and to move forward towards testing some possible solutions, always with the goal of engaging and supporting the best possible talent for this critical occupation in the nonprofit sector.

2 Background

A growing number of publications highlight the projected leadership transition facing the nonprofit sector as well as challenges nonprofits will face.

There are a range of reports, studies, research documents and articles about leadership and leadership development in the nonprofit sector. A growing number of these publications highlight the projected leadership transition facing the nonprofit sector as well as the increasing challenges nonprofits or will face in attracting, retaining and developing people for senior leadership positions in the years to come.

The projected deficit results from a number of factors including the ageing of those currently in leadership positions and their imminent retirement, the increased number of charitable organizations, employees who could take on leadership roles in the sector but who are moving to other jobs outside of the sector, the lack of succession planning within organizations and the competitive nature of the labour market as the recession recedes and demand for talented leaders and managers increases in all sectors of the economy.

Local information and research suggests that charitable organizations in Alberta and Saskatchewan are not immune to this problem. In Alberta, a study commissioned by Centrepoin in Calgary predicts that 36% of nonprofit executive directors plan to leave their current leadership position within the next two years, and 82% of nonprofit executive directors predict that they will be seeking new employment within the next five years. While equivalent data are not available for Saskatchewan, anecdotal evidence would suggest that a similar situation exists in that province.

By and large, those currently occupying senior leadership positions in nonprofits came up through the ranks and had little if any formal leadership or management training. Passion for the organization's mission is an important

but no longer sufficient competency for the lead job. Those assuming the senior paid position must also be effective managers and strong, visionary leaders. The demands are great and the compensation is not generally commensurate with the responsibilities. Leaders of small organizations are often isolated, unwilling to admit to any gaps in knowledge or expertise lest they be seen as incompetent, and largely left to their own devices if they want to develop their competencies to be more effective in meeting the organization's objectives or goals.

Over the past decade, enhancing nonprofit leadership has become a key concern within the nonprofit sector, and sector leaders have added voice to the need to invest in leadership development. Capacity-building organizations, intermediaries and foundations have invested in a wide variety of pilot projects, studies, focus groups and other initiatives designed to address this deficit.

“I find it very difficult to identify who and what type of leader we need for this organization at this particular time.”

A review of the current seminars, workshops, certificate and degree programs and other courses in the field of leadership development suggests that a broad selection of education and training programs is available to the sector. Post secondary institutions, professional associations and private organizations offer a range of formal education or training options. However, some long-standing formal programs developed with nonprofits in mind have recently been discontinued due to falling enrolments. For example, the newly implemented *Executive Leadership in the Nonprofit Sector* program offered through Grant MacEwan University has met some challenges in meeting its minimum enrolment levels.

So, there seems to be an interesting dichotomy between the growing body of information about what many are describing as an urgent need for leadership development in the sector and the fact that post-secondary educational institutions and private training organizations are struggling to meet even modest enrolment levels. The theory “if

we build it, they will come” has not achieved the intended outcomes.

“Beliefs and values, vision and alignment are pivotal to any age and any sector if people are going to engage. These are fundamental factors when people are looking for employment. They aren't age-specific.”

As part of its *Strengthening the Charitable Sector* program, the Muttart Foundation has begun to look at leadership development as one strategy to help build the capacity of charitable organizations to both fulfill their individual missions and contribute to the broader development of the sector. To help inform its work, the Foundation asked the HR Council for the Nonprofit Sector to conduct an exploratory study about the barriers that senior staff of social service charities in Alberta and Saskatchewan face in developing their leadership capacity.

The opportunity to collaborate with the Muttart Foundation on this matter proved timely for the HR Council. In early 2009, the HR Council revised its strategic plan and added two new strategic priorities, one of which is to promote leadership development and succession. The long-term outcome for this priority is to have a rich pool of leadership talent in the sector.

The issue of leadership and leadership development has been on the radar of the HR Council since its earliest days, when the various products and reports of The National Learning Initiative (NLI) undertaken by the Voluntary Sector Initiative were transferred over to the HR Council. One of the NLI's main products was a set of competencies for nonprofit leaders, which is referenced later in this report.

In 2005, the HR Council convened a group of organizations that had or were providing leadership training in the nonprofit sector in Canada. Nonprofit leaders concluded that deliberate, sustainable nonprofit leadership development needs to be cultivated from successes the sector has seen in experimental and pilot programs. Based on the

strengths of past leadership development programs, workshop participants identified some key components to incorporate in future programs: peer learning, coaching, and anchoring learning to the operation of organizations. They recognized the need to balance efforts to strengthen current leaders and efforts to develop new leaders. They also concluded that the collaboration of partners in the sector and educators and the engagement of both board members and managers in organizations are essential to ensure that leadership training and development will meet the needs of the sector and that it will be accessible to strengthen leadership throughout the sector.

In 2007, the HR Council collaborated with Philanthropic Foundations Canada to map the extent of current investments in leadership development by private funders in Canada, using the matrix tool originally developed by Grantmakers for Effective Organizations (GEO). This culminated in a report called *Building Leadership Capacity*, which was made available to members of Philanthropic Foundations Canada only.

In the HR Council's Labour Force Study (Report #1 published in 2008), key informants also identified the impending "leadership deficit" as an issue and raised questions about how the sector will handle leadership succession. In late 2009, the HR Council submitted a comprehensive project proposal to its primary funder, Human Resources and Skills Development Canada (HRSDC), to collect much-needed empirical information about the competencies newly-hired leaders have and the competencies boards recruit for. These research findings will support the identification of challenges sector organizations face in hiring for their top position and inform the development of strategies and specific resources and tools to meet these challenges. This project started in July 2010.

3 Approach taken for the study

“Organizations may simply not be aware of the need to invest in leadership and may not have an interest in this area at present despite its importance.”

From September 2009 to March 2010, the HR Council carried out an exploratory study under contract to the Muttart Foundation. The purpose of the study was to explore the barriers that senior staff in social service charities in Saskatchewan and Alberta face in developing their leadership capacity. The study was to consider three areas:

- How do organizations currently support leadership development for senior staff? What obstacles and barriers do they face in supporting leadership development and what changes are needed to overcome these barriers?
- What access does senior staff have to education and training programs to support leadership development? What barriers do senior staff members face in accessing these programs and how effective are these programs in supporting leadership development?
- How might organizations address leadership development more effectively in the future? What will organizations, and senior staff within these organizations, need to do differently to support leadership development?

The study largely consisted of organizing a series of focus groups with sector stakeholders and conducting a very limited number of interviews with representatives of educational institutions and other organizations that currently provide or have provided some form of leadership training. A background paper was developed to foster discussions with the focus group participants. The Muttart Foundation created an advisory committee which was instrumental in providing names of potential participants and giving feedback on the background paper and on a preliminary report on the key findings.

It became evident early in the process that exploring the topic of leadership development and training in the nonprofit sector could not be easily dissociated from some of the bigger questions about leadership itself: what it is, what it isn't, what makes a good leader, the impact of context and environment, and even the eternal question of whether leadership is innate or learned. In their first meeting, advisory committee members made the observation that "organizations may simply not be aware of the need to invest in leadership and may not have an interest in this area at present despite its importance." Therefore, in addition to asking questions about leadership development and the barriers to accessing training, focus group participants were also asked to provide their perspectives about what makes a good leader in this sector, whether and how the current context is affecting leadership needs, and about succession planning as a way to promote and encourage leadership.

Between November 2009 and January 2010, the HR Council, with the support of Peter Faid acting as the primary consultant, sponsored a series of focus groups with staff and board members of nonprofit organizations across the two provinces. Drawn primarily from small to mid-sized social service agencies, staff participants included those in the most senior paid position as well as emerging leaders. While the original project requirements called for consultations with senior leaders only, in discussions with the Muttart Foundation, as well as with the advisory committee members, there was consensus that it would be valuable to engage both current and emerging leaders in the process, as the latter might have different perspectives on the issue. In the first three sessions, emerging and senior leaders attended the same session. It was then decided to hold separate sessions with emerging leaders to give them more of a voice. Calls were made to contacts in each of the remaining cities with the request to send a potential leader to the local session.

A total of 146 people participated in 13 focus groups held in the following cities: Regina, Saskatoon, Yorkton, Edmonton (2), Calgary (2), Grande Prairie (2), Lethbridge (2), and Red Deer (2). Three people were also interviewed by telephone. Sixty-nine participants were executive directors or senior staff, 58 were emerging leaders, and 19 were chairs of boards. (The list of participants appears in Appendix A). It should be noted that several executive directors served on the board of another organization; they could therefore address the questions from both perspectives.

Along with the invitation to attend, participants were sent a background document describing the context and issues and posing four main questions along with several sub-questions. Readers were asked to consider the information provided in light of their own experience. (The background document appears in Appendix B.)

As indicated above, a much smaller part of the study consisted of undertaking telephone interviews with a very limited number of personnel from three academic institutions, four community leadership programs and one national umbrella nonprofit organization. The interviews were conducted with representatives of Mount Royal University, University of Regina, Grant MacEwan School of Business, Executive Directions Calgary, Canadian Community Leadership Network, Leadership Calgary, Leadership Saskatoon, Volunteer Saskatoon and Big Brothers Big Sisters of Canada. Eleven questions were used to guide a conversation focusing on the apparent disconnect between the demand and supply for leadership training and development in Saskatchewan and Alberta. (The questions appear in Appendix C). Results from these interviews appear at the end of the Findings Section (section four).

4 Key findings from focus groups

Many participants recognized that a shift in thinking would be required to attract young people to the sector.

Why people are interested

Discuss common issues

Each focus group opened with a question about why people felt encouraged to attend. Participants gave a range of reasons. The majority came to talk with people in similar circumstances and find solutions to common problems. For a number of people, the topics were timely because they were in the process of hiring a leader, typically an executive director, and had questions about how to attract strong leaders given the current economic and political environment. Others saw themselves as actual or potential leaders or careerists and wanted to learn more about opportunities and how to proceed. Several participants were themselves close to retirement age. In other cases people spoke of having to replace aging staff soon or adjust to a staffing component split between generations at each end of the spectrum. A number of organizations were on the cusp of a major change, and “transition” was used frequently.

“My management group is almost the same age as I am, but our staff are 15+ years younger.”

WHAT MAKES A GOOD LEADER?

This question was asked because given the change in theories of leadership over time, and the diversity of the nonprofit sector, it is often difficult to find consensus on a definition of leadership. There seems to be agreement, however, that the leadership role is changing in the not-for-profit sector.

In its report, *Building Leadership Capacity for the 21st Century* (undated), the W. K. Kellogg Foundation refers to some of the characteristics necessary for successful leaders of the future. Future leaders must have confidence and excellent management skills. They must recognize their strengths and weaknesses and know how to build complementary teams. They should be capable of developing collaborative working relationships across numerous and varied constituencies and stakeholders and feel comfortable operating at all levels of society to affect and institutionalize change. The new leader must know how to network and build coalitions, because partnerships and strategic alliances are critical for effective leadership and the survival of the organization. Leaders must know how to work with corporations, governments and other nonprofit organizations, because the complexity of modern problems will require the three sectors combining their resources and influence to forge new solutions. "Leadership needs to be thought of as a collaborative process for effective, positive social change." (Kellogg, p.4)

Various researchers have strived to define the skills required to be a leader in the sector, but typically with the rider that requirements depend on the type and size of an organization and the stage of its development. In other words, not all skills apply to all people in all circumstances at the same time.

Participants were asked about the list of leadership competencies generated by the National Learning Initiative, whether leadership skills were innate or learned, and how to recognize or develop the skills.

Find solutions

There was genuine concern about the future of the sector – and those concerns often extended to the sustainability of funding, the rigidity of funders' requirements, perceptions by government and capacity building. Many participants recognized that a shift in thinking would be required to attract young people to the sector, but were uncertain about what that entailed. Retention of young staff was also an issue; and, while acknowledging the benefits of professional development as a retention strategy, for many "PD" was the first thing to be cut when budgets got tight. Small agencies were particularly disadvantaged because workload demands left staff unable to attend off-site opportunities. However, regardless of size, "we're too busy" was often given as the reason for not being able to

"We've been talking about succession planning for years, but there are always barriers. Time is a large factor."

develop staff or plan for succession. The focus groups were seen as an opportunity to hear ideas about how to deal with these challenges.

Explore best practices

Most were interested in learning more about leadership or succession planning and the emerging thinking on these topics. Graduates and participants in training programs wanted to talk about their experiences. People with strong ideas about leadership or who had been successful in planning for leadership development – as well as those who had not – wanted others to hear their stories. A few younger participants were there because their executive director had asked them to attend. Almost everyone saw value in meeting face to face.

"Some people may not think they have any leadership skills because of what life has taught them, but they truly do when given the opportunity."

Defining leadership competencies

Many respondents thought that the list was too long, that it would be impossible for one person to possess all the knowledge and skills listed there. Others added to the list. Training in a specific field, charisma, a strong work ethic, common sense, drive, experience taking risk, tenacity, confidence, the ability to create trust, experience with boards, effective decision making, the ability to be flexible and adaptable, change management skills, the ability to demonstrate respect for all, and the ability to transfer learning – each of these was seen as essential to leadership by one or more participants.

Matching agency circumstances

As several people pointed out, the type of leader an organization needs depends on certain characteristics of the organization – size, structure, age and history, the type of services provided, staff makeup, the board governance model and finances or funding. Others said the balance in the competencies would differ by organization. So success depends on selecting the right person at the right time. A few referred to the importance of leadership style. According to these people, egalitarianism is a critical requirement for the sector; there is no place for authoritarian or ego-driven leadership.

Beliefs, values, vision essential

Some participants agreed that beliefs and values, vision and alignment and relationships were essential leadership qualities for the nonprofit sector, and that many of the other skills listed could be more suitably termed management skills. Yet others said that without strategic thinking, creativity and the ability to handle complexity, leaders would not survive in today's nonprofit environment. Leaders are hired on the basis of their values and beliefs, but a good leader is one who can translate those values and beliefs to the workplace environment and culture. For example, it is not enough to speak about the value of diversity or inclusion; the organization has to demonstrate those values internally, through its board makeup and management team. However, several participants emphasized that the nonprofit sector is not unique in this regard. The

same competencies – vision and ethical decision-making for example – hold true for all sectors today, including the private sector, so our sector does not have a competitive advantage.

Difficulty identifying leaders

One of the difficulties for organizations is recognizing leadership potential when recruiting or promoting staff. A few participants bravely admitted that they might be dismissing people as unsuited to leadership because they look or sound different from what is expected. Others, now unsure they were asking appropriate questions when interviewing, wondered how to draw out a candidate's values without getting a “motherhood and apple pie” response.

Leadership – learned or innate?

Some said leadership is innate, but others thought that everyone has the potential to be a leader in some role or capacity. It's all a question of how you invest in people and create opportunities to empower them. But it's not enough to send someone to a course on leadership; there have to be opportunities in the organization to apply what's learned.

“You cannot be a success in this sector as an executive director if you are not willing to roll up your sleeves. That's an attribute. You have to be flexible and cheerfully adaptable and take on a whole bunch of tasks you would never dream of being asked to do in the private sector. Some formal training and experience in the sector may be preferable, but attributes trump the day.”

LEADERSHIP DEVELOPMENT — WHAT WORKS AND WHAT DOESN'T?

According to Betsy Hubbard (2005), the term "leadership development" is so widely understood that it is rarely defined. She offers the definition: "increasing an individual's ability to be effective when seeking to work with or direct others." Her review indicates that where and how leadership development takes place is changing, and leadership development is more likely to:

- Focus on experience-based methodologies, such as job rotations, project assignments, coaching or mentoring
- Be customized to specific audiences in order to focus on specific business initiatives
- Extend across vertical layers in an organization, rather than simply focus on top management
- Consist of short, targeted courses rather than long, general ones
- Use technology or distance learning methods
- Be conducted on-site rather than off (p.13)

Hubbard goes on to speculate that the increase in these types of activities may reflect an attempt to address the problem of transferability. She cites a 2003 study that found that only 54 percent of leaders were satisfied with the development opportunities they were offered, and suggests that the dissatisfaction is in part associated with the challenge of transferring the skills and ideas learned in a classroom or leadership program to the "real" work environment (p.20).

United Way Toronto (2008) refers to leadership development as "the strategies, approaches and programs designed to develop and enhance the leadership skills and capabilities of individuals."

Participants were asked to comment on the list of barriers identified in the background paper and their own leadership development experiences.

Problems with formal training

When asked about their experience with formal and informal development opportunities, the drawbacks to formal training outlined in the background document were reiterated. Participants described courses as too expensive, not speaking directly to the sector, and not providing a hands-on component. This last characteristic was particularly important – the opportunity and ability to take what was learned and apply it or put it into action before the knowledge was lost. The time, energy and money required to complete a degree while working full time left people feeling drained and dragged the process out for years. Young mothers were particularly disadvantaged. It appears that organizations will often pay course fees (small agencies being the exception), but the employee has to cover travel and accommodation costs, which can become substantial when frequent travel is required. Participants

in Yorkton and Grande Prairie in particular raised travel costs as an issue. A few participants spoke of having to withdraw from university or college courses for reasons of work demands or finances. One person was going to have to leave the sector for a higher paying job to cover the debt he had incurred while taking a master's degree.

“The Canadian Society of Association of Executives training is probably the most durable and credible of any available, and CSAE offers a very important leadership event in February. But at a thousand dollars a person, it's priced way out of the market for many of us and too expensive to justify to boards when budgets are tight.”

Programs singled out

Some participants described specific educational programs as highly beneficial, while others said the opposite about the same program. The Banff School of Management and the Grant McEwan Executive Leadership program were prime examples. The criticism was that the courses were too general or “static” or not relevant enough to the sector. One person described Mount Royal College’s Bachelor of Applied Nonprofit Studies as being highly relevant, but when she began looking for work, no one was familiar with it. Participants in Calgary spoke highly of the ten-month Leadership Calgary program offered by Volunteer Calgary. Six or seven of the participants were graduates of that program. Similar compliments were paid to the Leadership Network program offered by The Leadership Centre of Central Alberta (Red Deer) and Leadership Transitions Calgary (now called Nonprofit Leadership for New Executives) offered by Centrepont National organizations, such as the Multiple Sclerosis Society, offer in-house training programs, which are relevant but not necessarily geared towards leadership. Again, sustaining the skills acquired can be difficult unless they are applied immediately upon completion. Also, some national organizations are cutting travel and training budgets, so individuals are becoming more inquisitive about what is available locally.

“When we create leadership programs, we do a very good job of replicating the past set of leaders, because we choose people who are most like the old ones.”

Career guidance missing

There was one consistency: young people receive little or no guidance about which education courses will further their career. Several participants were about to embark on a degree, often a master’s, without any information as to whether it would help them in their jobs. Organizations seemed unable to advise potential leaders as to whether formal education trumped experience, and, if it did, what

degree would be the most suitable. (The exceptions to this are professional fields where certification is a job requirement.) A few participants talked about doing an MBA, possibly because of its cachet and its marketability in other sectors.

Courses, not degrees

The general consensus was that degrees do not necessarily prepare one for leadership in the non-profit sector, although specific courses may. Several participants reinforced the need (described in the background) for some balance between formal and informal training; for example, short courses followed by mentorship with opportunities to apply what was learned. It was thought that this would aid in retention. Opinions were divided about online training, with most people preferring face to face or, at a minimum, opportunities to interact personally with others as part of an online program.

Preference for mentorship

Mentorship was by far the most preferred informal leadership development activity. Many participants had had a positive experience with mentorship at some stage in their career, or saw it as having great potential. The problem is finding a suitable mentor. Executive directors in the focus groups often did not have time, and they may not be the best suited to mentor up and coming leaders. In exceptional circumstances, board members can serve as mentors, but that option depended on the board’s makeup, the governance model, the executive director’s style and internal relationships.

“As a relatively new executive director, I’m interested in having a mentor, because my board doesn’t provide technical support, and in learning where I might go after this. What professional opportunities are there to build my leadership qualities?”

Youth like choosing their own mentor

Young people were often finding their own mentors, and not necessarily within the nonprofit sector. They described seeking out mentors from the community, private business, and among well-placed colleagues elsewhere in the sector. Generations X and Y are highly proficient at social networking via technology, which makes it possible to connect with mentors around the world. One or two agencies are facilitating this. Several participants saw online mentoring as an effective way of connecting people and providing immediate answers. Others would miss the personal relationship. The criteria for mentoring success included being able to choose one's mentors, rather than having them assigned, and recruiting mentors familiar with the nonprofit sector. It was also pointed out that mentoring is an "organic" process, the implication being that an individual may gravitate to different mentors as he or she matures as a leader or the needs change.

“Young people from university want the feedback from a mentor and evaluations to find out where they can improve and what their strengths are.”

Matching program an option

Asked about the merit of a more formal mentoring program, new leaders expressed some interest, but preferred informal as being more natural and less forced. One suggestion was a program modelled on Big Brothers and Big Sisters where people were matched by age or jobs or interest with a mentor. People would be expected to ask and answer questions beforehand to ensure the best match. It is possible that retiring executive directors could serve in this pool. Potentially, mentoring could occur on both sides, because younger people typically know more about technology and social networking than do mature leaders.

“The past CEO was my mentor and I credit him for preparing me for this position. Had I not had that, I don't know if I'd be in this job. Maybe we're all one person away from good mentorship.”

Support for peer learning and networking

There was considerable support for the idea of local peer learning circles, which were seen as meeting the requirements of being immediate and relevant, face-to-face, and inexpensive to attend. These circles could also supplement online learning and pave the way to building the capacity of the sector. According to some participants, a lot of informal learning already occurs at lunch or coffee breaks with colleagues or sessions with staff from other organizations.

Networking was also identified as a way to strengthen the sector by providing opportunities to exchange information, collaborate and share resources (speakers, etc.). According to one participant, sending staff to networking sessions and asking them to share what they have learned with their colleagues is one way of developing leadership. Others said that networks took too much time, including building relationships, and financial support for their organizations to be involved. However, networking can also benefit executive directors who need advice or information on large or sensitive issues. In the U.S., younger workers have organized themselves and formed the Young Nonprofit Professionals Network (YNPN). It promotes “an efficient, viable and inclusive nonprofit sector that supports the growth, learning and development of young professionals.” They engage and support future nonprofit and community leaders through professional development, networking and social opportunities designed for young people involved in the nonprofit community. They now have 28 chapters in various cities in the United States.

WHAT TRENDS ARE MOST LIKELY TO AFFECT LEADERSHIP AND LEADERSHIP DEVELOPMENT?

All of today's leaders must navigate in a world that is undergoing constant change. As the landscape changes, leaders need tools and new approaches to harness that change in order to improve organizational outcomes. For this sector, this may mean doing leadership differently.

The 2009 report entitled *Convergence: How Five Trends Will Reshape the Social Sector* commissioned by the James Irvine Foundation and prepared by La Piana Consulting, contends that the nonprofit sector is at an "inflection point" ...that will fundamentally reshape it long after the recession, when surviving nonprofits find themselves in a new reality- not just economically, but demographically, technologically and socially." The report goes on to provide two examples where significant shifts (demographics and technology) will affect leadership.

"The nonprofit sector has always featured an intergenerational workplace, with older workers in leadership positions and younger colleagues in front-line or support positions. However, the future will require nonprofits to understand how to share leadership across generations. This shift will be fraught with stereotypes and assumptions on all sides, and complicated by very real differences in the world view of those who experienced the socially transformative Civil Rights Era and those who now follow- less ideologically perhaps, but no less earnestly. There are also significant distinctions in how younger generations value, approach, and leverage engagement, transparency, technology, professional development and work-life balance. These differences will have to be negotiated" (p.7).

"Tomorrow's nonprofit leaders are as likely to understand open source technology platforms as the intricacies of fundraising, and they will not hesitate to use one to advance the other. When that works for them, they will share their success instantly with colleagues around the world, perhaps enticing others to devote some of their own creative energy to the cause. As online or mobile activism and networked organizing create new ways for individuals to fulfill their service goals and interests, notions of membership, volunteering and social engagement will be transformed and continually redefined" (p. 5).

Focus group participants provided the following insights about the changes or trends they were seeing and experiencing and how those might affect the position, practice and skills of leadership and leadership development in nonprofits.

Exchanges and secondments hold promise

The suggestion of organizations exchanging staff or creating secondment opportunities was also received enthusiastically by younger leaders, although concerns were raised about ensuring an exact fit and meeting needs such as liability insurance. Participants saw this as an excellent way to increase their learning and provide experience that may not be available in their own organization. Secondment could also address the organizational problem of trying to hold onto a strong staff

member or potential leader until a suitable position becomes vacant. It was pointed out that one of the most beneficial aspects of the Muttart Fellowship program was the opportunity it gave potential leaders to learn by taking over a senior position in the fellow's absence.

"I'm wondering where I can go, because most of the agencies are not very big and I'm looking for ways to grow and progress in my career."

1. An inflection point, in mathematics, is the point on a graph at which the curve changes from positive to negative, or vice versa.

Encourage offering of vacant training spaces

Participants had little experience with private companies or government offering unfilled training spaces to nonprofit organizations, a reference made in the background document, but would like to see it encouraged. One person saw the option as a way for corporations to maintain their sponsorship levels without having to put out money, something that might appeal in tougher economic times. Participants would be interested in taking up such opportunities, but were unsure as to how to find out about them.

Team leadership

Team leadership as opposed to the more traditional model of the sole, charismatic leader was thought to be a trend of the future. Schools and universities encourage team projects, group learning and shared leadership, so this is a working style that younger people are used to and will come to expect of employers. This leadership style makes cross-training advantageous and helps to ensure that more than one person is able to carry a role. It thereby increases organizational flexibility and stability as well as sustainability. A team could also be configured to bring in expertise from other sub-sectors in the sector as well as from other sectors like the private or public sectors.

Job complexity

Another trend in support of team leadership is the increasing complexity of the sector. Several factors are contributing to this change. More complicated funding requirements is one. The amount of information and the speed in which it can be transmitted is another. Many organizations are finding it increasingly difficult to remain current in HR and other disciplines affecting operations. A third is the need to be financially sophisticated and bring in money from a variety of sources. Leaders are beginning to spend more time managing than leading, and the person in charge is sometimes stretched to capacity. It may be unreasonable in some cases to expect one person to possess the information, skills and time required to head up an organization.

“For my organization to thrive in future, just doing what I’m doing today isn’t going to be enough. So the thought of how to prepare leaders becomes mind-boggling, and makes me wonder if the question shouldn’t be: how do we change our organizations to make it possible for people to contribute?”

Organizations may have to collaborate more with each other and with other sectors. This will require leaders putting negotiation and persuasion skills to use to help others think and act in terms of common interests and the greater good rather than positions and turfs.

Funding shortages

Funding cuts are having an impact across the sector, and this has implications for the long term. A shortage of funding in already difficult economic times may force small agencies out of business. Larger ones may or may not be able to take on more work. Certainly the agencies that survive will look different. This new landscape may affect the size of the workforce the sector is able to support and require a radically different kind of leadership.

Labour shortages

The shortage of human resources will force organizations to find ways to understand what motivates young people, embrace their values and accommodate their habits or work preferences. More of them will be university-educated and are expected to change careers more often. So flexibility will be key, although small organizations or those with certain mandates or grant requirements are limited in how flexible they can be, and traditional leaders may be challenged to give up their ways. How successfully an organization responds, adapts and is managed may well determine its future.

Work-life balance

With regard to work-life balance, some focus group participants saw it as a societal trend rather than a generational preference. The definition of work-life balance is different for everyone. Leaders will have to explore what it means to employees and how their requests can be acted upon. Whether generational or societal, this trend also supports the need for greater flexibility, acknowledgement of which has already been acted on by several organizations.

Technology

Technology will have a bigger impact. It will increase options such as working from home—or from anywhere—and group activities, resulting in the potential to change the way many organizations do business. However, finding the funds to upgrade equipment, and remain current with new software and new applications will be difficult for some non-profit organizations.

“A lot of people are on their BlackBerries and don’t seem to realize that they’re working 12 hour days. They’re not at work, so they think they have a work-life balance.”

Cultural diversity

Diversity seemed to be less of an issue for focus group participants. One or two mentioned having to respond to cultural and linguistic changes in client populations, but little was said by mainstream organizations about encouraging diversity in the nonprofit labour force. A participant representing new Canadians criticized the sector for just that reason. New Canadians are not being made use of and are frustrated at being unable to break into a tight community that is not open to new ways of thinking and does not provide access and opportunities to the skills these people can offer. There was no mention made of cultural diversity and the position of leadership in nonprofits.

Preparing new leaders

Are today’s leaders equipped to train and develop the leaders of tomorrow? Again, the answer to the question tended to be: it depends. Given the trends outlined above, the organizations may look quite different in a few years, although exactly how is not yet clear. Young people in the focus groups valued being able to learn from current leaders, particularly about the origins and history of the organization, how programs evolved or died, and what inspired the leader to choose this line of work. The current leader knows the field and has the contacts, both of benefit to the learner. However, they were less likely to automatically see their current leader as the mentor and more inclined to want to learn from a variety of sources. Whether or not the current leader was solely responsible for the training and development of the incoming leader depended on organizational and personal values. An organization that expected a leader to come up through the ranks or to be a certain type may not offer the best environment for mentorship. Some participants expressed concern that when an organization appointed the current leader as mentor to the successor, the new leader had no say in the matter. Leaders of today must recognize that new leaders need many different leadership learning opportunities, including exposure to board processes.

“The technical stuff is easy to learn. Some of us are coming into jobs knowing more of the technical stuff than our leaders do, but not knowing the agency’s stories and history. That’s the part we’re missing – the context: where the sector came from, where it’s going and where we fit in that timeline.”

WHY ISN'T SUCCESSION PLANNING A MORE COMMON PRACTICE?

Succession planning is one important way to ensure that prospective leaders are identified and supported in their journey towards the senior paid position in an organization. The background paper outlined a number of advantages to succession planning. However, a 2008 report prepared for the Annie E. Casey Foundation found that succession planning for nonprofit agencies is rare. Too often, volunteer boards would rather not have to contend with the time and leadership demands that succession planning requires. There are other reasons why succession planning is not a more common practice.

- Executive directors and boards do not have sufficient knowledge to develop such a plan or do not see it as important
- Organizations consider themselves too small to support a succession plan or believe there is no one presently within the organization who is a likely candidate
- Executive directors may fear compromising their authority or become a lame duck

The author of the Annie E. Casey report maintains that nonprofits are gradually starting to recognize the need for succession planning. In part, this is because so many of the boomer generation of executives are close to retiring. There is another reason. The next generation of leaders may not be interested in carrying on business as usual.

"...the so-called Gen X and Gen Y leaders most likely to take on top jobs may seek to restructure the executive role, creating collaborative or shared leadership models and job expectations that allow for a healthier balance between work and life. Succession planning in Boomer-led agencies can lay the groundwork for making these kinds of organizational changes" (p.4).

Participants were asked to comment on the practice of succession planning, what is needed for it to work, the barriers to doing it, and what might be needed to do it more effectively.

Challenges to succession planning

Organizations are interested in succession planning, and several participants attended the focus groups just to learn more about it. Not all organizations have a plan, but most say they have initiated the discussion, either with staff, the board or both.

For a few, the organization was too small or in too much flux to introduce succession planning. Some recognized that any plan would have to be preceded by organizational change, which made the process more daunting. Several organizations are already taking steps to prepare individuals or all employees for different roles. Cross-training was one example. Yet others said succession planning and bringing in new staff to fill the gaps was too expensive.

"As someone who is interested in being a leader in the sector, I've been frustrated developing my own skills and abilities."

Board commitment necessary

Yet others described having succession plans that had not worked out – a person in line for promotion had left the organization, the training identified had not been implemented, a board acted independently of the plan. When this happens – the board places someone in a senior position, ignoring the person identified in the succession plan – it sends a message to the whole organization, potentially affecting morale and calling in question further planning. Board turnover and the predisposition of some boards to hire from outside can effectively scuttle succession planning, said participants. Lack of board education, involvement or commitment to succession planning was a concern for many.

Problems with identifying leaders

A number of executive directors and board participants expressed trepidation about identifying potential leaders through the succession planning process. If there is no internal movement of staff, it may take years for that person to rise to the top. Tapping someone on the shoulder may affect that employee's relationship with his or her colleagues. Or the plan may take the organization down a path it subsequently cannot follow. Likewise, those identified sometimes felt uncomfortable. One young person who was being groomed for a leadership role by being given more responsibilities was unsure how that was seen by her colleagues or how to handle the situation with them. A second agreed that being identified in the succession plan could prove awkward. Another participant thought this could be overcome by empowering all staff and planning successive roles for everyone. One or two executive directors were hesitant to tell the board of their plans to leave, because trust was missing and they feared they could be asked to leave sooner than they had intended.

“I started to talk to my board about succession planning, but I heard of two executive directors who were planning to leave and rather than use a transition process, their respective boards got rid of them. I don't feel valued by my board and there's not a lot of trust there.”

Organizations, especially the smaller ones, need help

When asked what information or tools organizations need to help with succession planning, many said they had an idea of how to proceed, but not enough time to act. The needs varied, but it was generally thought that smaller organizations required the most help. They were the ones wondering what to do when there were too few positions to rotate staff, or too tight a budget to cross train or prepare them. Finding the time to create a unique, well thought out plan could be daunting. Other organizations needed help in identifying leaders, assessing their skills and planning strategies for their development. Participants were also interested in getting help in educating boards about succession planning and liked the idea of a succession planning coach, someone who could come into the organization, do some background exploration, provide some expertise and help the organization draft and implement a plan.

“Each year the board gets greyer and greyer. And I feel the board has been focusing heavily on management and not on leadership. So we've started discussions about the values of a leadership model and succession planning.”

5 Findings from educator interviews

Recruitment and retention in academic and community programs is a challenge – but not in all programs

The three academic programs interviewed struggle to achieve full enrolment (including students fully subsidized by funders like United Way), whereas the four community programs consistently have demand and interest that exceeds available spaces.

Two common barriers: time and money, affect participation and engagement in all community and academic programs

Though most programs are affordable, nonprofit organizations are challenged to find funds for professional development. Given the salary levels in the nonprofit sector, it is often also a challenge for staff to pay for all or part of the program as well as other costs such as transportation or accommodation, if the students live some distance from where the program is offered. There is also concern that, even when leadership training is supported by the organization, participants are expected to meet their job responsibilities on top of their educational obligations.

Program evaluation is limited

All respondents responsible for programs and training acknowledge that program evaluations have been limited, apart from the typical satisfaction surveys conducted periodically.

Respondents' views and experiences diverge on the role of post-secondary institutions in offering leadership development and courses and partnering with the community

Some respondents feel that where the nonprofit program resides within a university could affect perceptions about the nature of the training program and enrolment levels. It was also observed that how the academic institution approaches partnerships with community organizations may affect perceptions about the value and the relevance of the program as well. One respondent felt that this study might be an opportunity for educators and nonprofit organizations, together, to map out the range of offerings and approaches within programs, both in the community and within academic offerings. It was suggested that this should not be an either/or discussion.

Concerns expressed about the limited learning and development opportunities for aspiring leaders and how their needs and approaches to learning likely differ from the existing leaders

There was consensus that more attention needs to be paid to the aspiring leaders and that what they want to learn and the way in which they want to learn is significantly different from the existing leaders cohort. Any program or initiative would have to take this into consideration.

There is no consensus about the projected deficit in leadership in the nonprofit sector

Respondents shared a belief that baby boomers will not leave the sector as anticipated, and a concern about organizations' capacity to develop the next generation of executive directors. It was unclear to them whether attention is being focused on succession or if there is support for it. They felt that board support was minimal, including for leadership development.

6 Observations about the findings

The job demands of the senior paid position, especially in small organizations, may be unsustainable, especially if organizations want to attract younger people into leadership positions.

Keeping in mind the study's three areas of inquiry, this section represents our observations about what we heard about the issues of leadership, leadership skills and development and training in the focus groups and in the interviews with educators.

On leadership

While focus group participants all expressed considerable interest in the topic of leadership and leadership development, it cannot be easily disentangled from the challenges that many organizations are grappling with, such as reduced government funding, more competition for donors, the need to diversify funding sources, increased demands for accountability or increasing demand for services. Larger-scale trends such as demographic shifts and the impact of technology also come into play. Although no count of hands was taken, several organizations spoke of facing a transition brought about by the impending retirement of senior managers and staff or other external factors such as reductions in government funding and increasing competition for funds. Concern about leadership was similar regardless of size or location of the organization. There is acknowledgement that significant changes need to be made within organizations to adapt to a rapidly changing environment, but some uncertainty about how to proceed. New approaches, new thinking and new forms of leadership may be required.

Organizations may also have to start rethinking the role of the executive director or challenging the single manager model. Team, shared or collaborative leadership and less hierarchical structures may be required – arrangements which younger people appear to be more comfortable with and which flow from the general belief that one person is unlikely to possess all of the leadership competencies such as those developed by the National Learning Initiative in 2003. The job demands of the senior paid position, especially in small organizations, may be unsustainable, especially if organizations want to attract

younger people into leadership positions. It was clear in our process that next generation leaders, while committed to the cause of an organization, are not interested in long hours and low pay. This is consistent with findings from various reports produced by the Annie E. Casey Foundation such as *Ready to Lead, Next Generations Speak Out, Up Next: Generation Change and the Leadership of Nonprofit Organizations*, and *Next Shift: Beyond the Nonprofit Leadership Crisis*, to name but a few. A quote in La Piana's report on *Convergence: How Five Trends Will Reshape the Social Sector* sums it up well:

"It's interesting to look at recent studies on nonprofit leadership deficits. That's very conventional thinking-replacement thinking. I think generational shift, along with trends related to diversity and technological advances, will change how we look at the leadership pipelines. Less replacement theory, more demand to revamp the executive director's job so it is more doable. We need to increasingly look at the single leader model... and challenge that assumption of "leader." We need to move to more shared leadership for organizations."

Much of the attention to leadership training and development in the nonprofit sector is triggered by concerns that a leadership deficit is looming, due to the retirement of the babyboom generation, who largely occupy current positions of leadership. (The Bridgespan Group's 2006 report on the nonprofit sector's leadership deficit raised the alarm but it should be noted that no similar research has ever been conducted in Canada). And because there are few mid-level managers in nonprofits (75% of the organizations have fewer than 10 employees and therefore little or no middle-level managers), there has been increasing interest in leadership development and training programs to groom and support the emerging leaders, who tend to be younger and therefore less experienced. While participants in the focus groups might not have used the words leadership deficit or leadership crisis, some spoke of impending retirements among senior staff as a concern. But one focus group participant challenged that concept, suggesting that supply may exceed demand. A long-time executive director in Calgary, he pointed out that young people completing the

Leadership Calgary training are not being hired into leadership positions as quickly as they had hoped. Telephone interviewees were similarly sceptical about the leadership crisis, speculating that boomers will not be leaving the sector as previously anticipated. Several focus group participants did not see promotions happening as soon as they would like either. A word of caution is therefore in order. Existing leaders may not retire as quickly as had been anticipated and it may be so for a number of reasons- some of them financial. Absent more empirical data about the retirement plans of existing leaders, we should be careful about saying that there will be a deficit of persons to assume leadership positions in nonprofits in Canada in the next few years, nor should we be unduly raising the expectations of emerging leaders. And if the existing leaders do not depart as expected, will those waiting in the wings give up and move on to other jobs in the public and private sectors?

"It's interesting to look at recent studies on nonprofit leadership deficits. That's very conventional thinking-replacement thinking. I think generational shift, along with trends related to diversity and technological advances, will change how we look at the leadership pipelines. Less replacement theory, more demand to revamp the executive director's job so it is more doable. We need to increasingly look at the single leader model...and challenge that assumption of "leader." We need to move to more shared leadership for organizations."

On leadership skills, development and training

Focus group participants of both generations identified similar essential qualities in a leader, namely those making up the clusters in the National Learning Initiative relating to beliefs and values, vision and alignment. This is in line with research findings: young and old are motivated by satisfaction in making a difference, helping others and the ability to align personal and organizational values. Both generations believe that effective leadership includes having a vision, communication skills and the ability to collaborate. These findings align with a recent report released by Community Disability Services in Alberta on Leadership Development and Sustainability (2009). Their top three leadership skills were listed as: the ability to collaborate, strong communication skills, and positive interpersonal skills. While these skills remain fundamental, changes in the nonprofit environment may require new competencies such as the ability to lead an organization so that it can adapt more quickly to changing circumstances, greater business acumen, the ability to assess and take more risks, and the ability to build more effective partnerships with other sectors.

We came into this study with the hypothesis that two key barriers to leadership training were time and cost. These were essentially validated by both the focus group participants and the educators, although community-based leadership training initiatives were having much greater success recruiting participants than were the educational institutions. Small organizations are particularly affected by the barriers of time and cost. They report not having the capacity to allow staff to attend professional development training off-site during business hours. On top of program expenses, travel costs, and the energy required to sustain a course of study while working are all deterrents for learners in small centres.

Both generations are at best ambivalent about the value of academic training for leadership positions. It hasn't always met their needs and the model of applying what has been learned is

not prevalent in formal training programs. This finding would be consistent with young leaders surveyed by Cornelius and Corvington, who questioned whether formal education is germane to the nonprofit position they want or even relevant to their career advancement within the sector (2008, p. 11). There may also be ambivalence about taking courses or degrees because they already have a degree or diploma. (Nearly all sector employees in Canada have completed high school and seven out of ten employees have acquired a post-secondary education, Nonprofit Labour Force Statistics, HR Council for the Nonprofit Sector). And, unlike the private or public sectors, there may be few if any incentives such as an increase in salary or moving up the career ladder to another position. Interestingly enough, those we spoke with from educational institutions were not extolling the virtues of academic leadership development program at any great length either. While there does not seem to be a high level of interest from the academic institutions at this time to be more responsive to the training needs of sector organizations, there is interest in having more conversations about the issue with sector and other stakeholders. There is also consensus from both sector stakeholders and training providers that the best approach to learning allows for a combination of both theory and practice.

While existing leaders did not seem to have a great appetite for leadership development opportunities, emerging leaders in particular, were quite clear about the type of training they want: it needs to be short-term, issue or skill specific, locally provided and forward looking. They want to be able to apply what they have learned. They want to know where to tap into networks and how to locate reliable, practical, just-in-time solutions. Social networking is their preferred way to maintain connections, spread information and, possibly, learn. But social networking is not enough. Emerging leaders made it clear that they want to be connected with their peers face-to-face as well as to community or sector-based experts. In other words, they want a variety of learning experiences, including mentors.

Mentorship was often mentioned by the emerging leaders in the discussions about leadership

development, but again they were reasonably clear about their expectations in this regard. Many want to work with mentors of their choosing. This was particularly true in Calgary, where it would seem that a number of emerging leaders are already linked in to mentors in the private sector, although we did not delve into specifics about the type of knowledge or information that these mentors provide. This same group also spoke of the value of tapping into existing leaders or recently retired leaders from the sector, but with a very specific purpose in mind. They want access to them in order to understand the history and origins of the organization, to tap into their web of relationships or networks and to get a better understanding of the sector overall.

Understanding more about jobs and career paths was also of interest to emerging leaders. This correlates strongly to the HR Council's findings from surveys and focus group research that suggest the need to 'build awareness of the diverse opportunities in the sector for early career employees and strengthening pathways into the sector, particularly through community-engaged learning opportunities.' For more information, please see the reports on the [Tapping into the Talents of Early and Late Career Employees](#) project page.

Overall, the focus group findings led us to believe that organizations aren't very active in supporting the development of their existing leaders. Most of the impetus for leadership development

is coming from the leaders or emerging leaders themselves, and not from the boards. There does not seem to be a strong culture of ongoing learning within organizations, nor much in the way of professional development plans to address any identified gaps in competencies or skills for any jobs, including the executive director's. And when it comes to succession planning, while a few organizations have plans, there is generally no structured approach to identifying what competencies an organization needs in a future leader nor a way to identify and support potential leaders within organizations. Recruiting boards and managers need help in identifying leadership potential, recognizing differences in the expectations of the next generation, and providing an environment that responds.

The recent report commissioned by the Looking Glass Institute in the U.S. on non-profit leadership development confirms that the context in which leaders must now exercise their leadership demands

more investment in professional development:

“The role of the nonprofit leader today and in the foreseeable future will be one of mastering fluidity, complexity and turmoil. The learning curve is steep and the organizational stakes are high. To be successful, individuals will need to develop both technical skills and leadership competencies. Organizations must become more intentional in growing leaders to ensure they have the talent within the organization to manage. They will need to do this by explicitly placing value on and investing in the professional development process.”

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7 Considerations for further action

1 Sector organizations need help in recognizing and dealing with transitional issues that go beyond leadership development

While some nonprofits are adapting to the changing environment, a large number of them remain unaware or unprepared for the changes already upon them. They need help in making the transition to a future characterized by changing demographics, the increasing use of technology to connect people and solve problems, a more complex operational environment, and the desire of non-government funders to shape the direction of social change by targeting issues rather than funding individual organizations.

Executive directors need to understand the context and what changes need to be made, but boards of directors must be informed as well. Not only do they have to comprehend these trends and their impact on the organizational mission so that they can make the best strategic decisions, but boards also have the primary and critical responsibility of selecting the best person to assume the position of executive director and supporting their ongoing professional development. A better understanding of the issues, challenges and opportunities might lead to better alignment between the skills and knowledge of the ED and the strategic orientation of the organization. Help could take the form of discussions – in conferences or workshops – that examine the potential implications of these changes and assist organizations in developing actions in-house.

2 Professional development is going to look different for the next generation of leaders than it did for the past

Based on the participation and responses of the emerging leaders, the future of social service charities in Alberta and Saskatchewan holds some promise. The emerging leaders are enthusiastic about the prospects of a career in the sector. Most are well educated and committed to learning. If there is to be an investment in leadership development in social service charities in Saskatchewan and Alberta, the target audience should be the emerging leaders, to support and equip them to effectively manage and address current and future challenges. And they have made clear the ways in which they want to learn. This study demonstrates that emerging leaders want to be connected to each other face-to-face as well as to community or sector-based experts. They want a variety of learning experiences, including mentors, but mentors of their choosing, as well as the ability to put into practice what they learn..Social networking is their preferred way to maintain connections, spread information and, possibly, learn.

3 The sector can benefit from information and best practice relating to career planning and leadership development

When hiring or promoting, boards and executive directors alike are having trouble identifying leadership potential at all levels. Consequently, boards often fall back on hiring a replica of the outgoing leader or become hesitant to hire from within. Even once a promising leader has been identified in-house, organizations may be unsure as to how to promote and develop that person. What is needed are tools, information, or even training related to succession planning and leadership development.

4 A collaborative long-term effort will be necessary

Finally, while future leadership development efforts could begin to focus on raising awareness with boards and EDs, as well as looking at new ways to support the emerging leaders, a range of solutions and a long-term perspective and commitment will be required. The challenge cannot be undertaken by one single agent, but several small steps could have a large impact on the sector's sustainability and growth. Success will ultimately require a shared effort between governments, funders, trainers and educators, non-profit agencies and current and emerging leaders. Whatever the solutions, one size will not fit all. What works for large or mature organizations will not necessarily be appropriate for grass roots ones. Edmonton's needs will be different from Yorkton's or Grande Prairie's. But given the commonality of the perspectives on leadership development and training, and the diversity of agencies' resources and capabilities, it would be more effective to look at collective and collaborative ways to ensure these organizations have the leadership talent they need in the coming years.

The Muttart Foundation is well equipped to initiate actions that reflect these considerations. It has a global understanding of the non-profit sector and is well respected as a funder devoted to building the sector's capacity. The foundation has demonstrated its willingness to take innovative approaches to problem solving, as evidenced in the fellowship program and the HR cluster - both of which required a long-term commitment and investment similar to the type needed here. Finally, the foundation understands the value in opening a dialogue and taking the first steps. The HR Council hopes to continue to work in collaboration with the Foundation on these matters in order to meet the sector's ultimate goal of ensuring we have a rich pool of leadership talent now and in the future.

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Appendix A

Focus group participants

Saskatoon

Name	Title	Organization
Rod Butler	Board Chair	Boys and Girls Clubs of Saskatoon
May Henderson	Executive Director	Saskatoon Indian & Metis Friendship Centre
Ashley Kayseas	Executive Director	Aboriginal Friendship Centres of Saskatchewan
Cornelia Laliberte	Board Member	YMCA Saskatoon
Lynn Latta	Director, Government Relations & Business Enterprise	CNIB
Darrell Lechman	Executive Director	Saskatoon Community Youth Arts Programming Inc.
Kim Megyesi	Caseworker	Big Brothers Big Sisters of Saskatoon and Area
Trish St. Onge	Executive Director	Catholic Family Services of Saskatoon
Ben Voss	Board Member	Big Brothers Big Sisters of Saskatoon
Wayne Wiens	Executive Director	Big Brothers Big Sisters of Saskatoon and Area

Regina

Name	Title	Organization
Larissa Anderson	Executive Director	Early Childhood Circle Project
Patricia Clark	Executive Director	SCEP Centre Society
Karen Dackiw	Director of Development	Regina Humane Society
Deanna Elias-Henry	Executive Director	YWCA of Regina
Cindy Kobayashi	Manager, Fund Development	Kids Help Phone
Amanda Lanoway	Planned Giving and Major Gifts Coordinator	United Way of Regina

Mary Ann McGrath	Executive Director	Regina Early Learning Centre
Carlo Palazzo	Coordinator, Events & Volunteer Resources	Kids Help Phone
Shellie Pociuk	Executive Director	Regina Family Services
David Sax	Executive Director	Catholic Family Services Society
Charmaine Styles	Executive Director	Early Childhood Intervention Program
Kim Sutherland	Executive Director	Street Culture Kidz Project
Sarah Valli	Executive Director	SOFIA House

Yorkton

Name	Title	Organization
John Denysek	Executive Director	Saskatchewan Abilities Council
LaVern Dumka	Executive Director	Shelwin House
Aleksandra Hoerber	Vocational Senior Supervisor	Saskatchewan Abilities Council
Lorraine Moeller	Executive Director	Boys and Girls Club of Yorkton
Rhonda Oystrick	Executive Director	Accent on Kids
Donna Pelletier	Executive Director	Project Safe Haven
Tom Seeley	Board Member	SIGN (Society for the Involvement of Good Neighbours)
Richard Sevigny	Executive Director	SIGN
Lisa Washington	Executive Director	Mental health Drop-In Centre
Michelle Yaschuk	Executive Director	Parkland Early Childhood Intervention

Red Deer

Name	Title	Organization
Carolyn Brock	Program Coordinator	The Leadership Center
Joelle Burton	Domestic Violence Support Coordinator	Central Alberta Women's Outreach
Rebecca Chahine	Executive Director	Red Deer Native Friendship Centre
Rob Elliott	Executive Director	Parkland Youth Homes
Sheralle Greystone	Executive Director	Family Services of Central Alberta

Lianne Hazell	Residential Director	Safe Harbour Society for Health & Housing
Kath Hoffman	Executive Director	Red Deer Child Care Society
Walter Lidster	Executive Director	Family Services of Central Alberta
Dawna Morey	Executive Director	Community Information and Referral Society
Kathleen Mulinock	Program Coordinator	Youth & Volunteer Centre
David Murphy	Executive Director	Youth and Volunteer Centre
Kim Pasula	CEO	Community Capital
Vic Petersen	Board Chair	Family Services of Central Alberta
Stella Robb	Program Coordinator	Red Deer Child Care Society
Arnie Skoretz	Former Board Chair	Parkland Youth Homes
Belinda Stier	Board Chair	Community Capital
Charlie Turnbull	Program Manager	Central Alberta Women's Outreach
Les Waite	Program Coordinator	Youth & Volunteer Centre-Boys & Girls Club
Ian Wheeliker	Executive Director	Central Alberta Women's Emergency Shelter
Janice Wing	Executive Director	Red Deer and District Community Foundation

Lethbridge

Name	Title	Organization
Sarah Aimes	Program Director	Immigrant Services- Lethbridge Family Services
Chris Burton	Board Member	Volunteer Lethbridge
Jami Cook	Community Development Coordinator	Canadian Paraplegic Association, Alberta
Bob Dyer	President	Volunteer Lethbridge
Hannah Erb	Program Coordinator	Soul Edge
Tina Shingoose Fancy	Facilitator	Womenspace Resource Centre
Stephanie Fisher-Dortman	Executive Director	Lethbridge Community Out of School Association
Ron Fromme	Executive Director	Southern Alcare Manor
Tim Heavyshields	Resource Centre & MUST Coordinator	Lethbridge Shelter Resource Centre

Richard Hebert	Executive Director	Lethbridge YMCA
Geri Hecker	Executive Director	5th on 5th Youth Services
Rachel Hoof	Executive Director	Native Women's Transition Home
Dianne Kotkas	Program Director	DACAPO Program- Lethbridge Family Services
Dave Lawson	Executive Director	Lethbridge Association of Community Living
Paige McCann-Sauter	Community Inclusion Manager	Ability Resource Centre
Rob Miyashiro	Executive Director	Lethbridge Senior Citizens Organizaiton
Peter Portlock	Executive Director	Lethbridge Family Services
Rebecca Remington	Executive Director	Edenbridge Family Services
Chris Rowley	Board Member	Lethbridge Association of Community Living
Laurie Ruff	Executive Director	Volunteer Lethbridge
Jacinda Weiss	Executive Director	Aboriginal Council of Lethbridge

Edmonton

Name	Title	Organization
Patricia Bencz	Executive Director	Our House
Tamisan Bencz- Knight	Special Events & Community Relations	Edmonton Food Bank
Christi Brisson	Supervisor	ABC Head Start
Cindy de Bruijn	Executive Director	Gateway Association
Ione Challborn	Executive Director	CMHA
Kim Collister	Manager, Human Resources and Learning	Big Brothers Big Sisters
Brandy Currie	Program Manager	Oliver Centre for Children
Larry Derkach	Executive Director	Jewish Family Services
Roxanne Felix	Consultant	Multi-cultural Health Brokers
Jo-Anne Frank	Director of Operations	Elk Island Child & Youth Ranch
Kristy Harcourt	RespectED Coordinator	Red Cross
Mei Hung	Board of Directors	Assist Community Services Centre
Robin Klasson	Parent Talk Coordinator	Boys and Girls Club, Edmonton

Ruby Lecot-Timpson	Chief Operating Officer	Catholic Social Services
Marnie Lee	Social Development Liaison	FCS Strathcona County
Scott Lister	Director, Finance & Admin	The Support Network
Scott Lundell	Acting Executive Director	Information & Volunteer Centre for Strathcona County
Michele Markham	Team Leader	CMHA-Edmonton
Karen McDonald	Manager, Community Relations	Seniors Association of Greater Edmonton
Robin Murray	Manager Community Services	Edmonton John Howard Society
John Norton	Executive Director	Boys & Girls Club of Leduc
Ivon Perriera	Executive Director	Action for Healthy Communities
Kate Quinn	Executive Director	PAAFE
Rob Schnell	Chairperson	Norwood Child and Family Resource Centre
Patricia Schriver	Human Resources Manager	Chrysalis, An Alberta Society for Citizens with Disabilities
Heather Shupe	Coordinator	Seniors Association of Greater Edmonton
Craig Stumpf-Allen	Director, Scholarships & Special Funds	Edmonton Community Foundation
Sue Trefry	Board Chair	Jericho Youth Society (Cold Lake)
Perry Twaits	Executive Director	Assist Community Services Centre
Allan Undheim	Director Community Building and Investment	United Way of the Alberta Capital Region
Reetu Verma	Staff Member	Boyle Street Community Services
J. Denise Watson	Chairperson	Sexual Assault Centre of Edmonton
Hayley Weedon	Programs/Volunteer Coordinator	Westend Seniors
Kerry Woodland	PFK Coordinator	Edmonton Big Brothers Big Sisters

Calgary

Name	Title	Organization
Arlene Adamson	Chief Operating Officer	YWCA Calgary
Laurel Benson	Executive Director	Volunteer Calgary
Janet Burstall	Community Development Manager	Volunteer Calgary
Blythe Butler	Alumni	Leadership Calgary
Tariq Darr	Program Coordinator	Kerby Centre
Dani DeBoice	Board Chair	Volunteer Calgary
Nancy Dutton	Coordinator	Calgary Upstart, United Way
Sarah Empey	Board member	Canadian national Institute for the Blind
Glen Hickerson	Board Chair	Opportunity Works
Walter Hossli	Executive Director	Momentum Community Economic Development Society
Diane Jaeger	Co-Executive Director	Closer to Home Community Services
Jeff Kapler	Board Chair	AIDS Calgary Awareness Association
Sarah Kennie	Sexual Health Educator	Calgary Sexual Health Centre Society
Georgina Leschinski	Administrator	Southern Alberta Brain Injury Society
Jackie Mann	Program Coordinator	Two Wheel Youth
Avnish Mehta	Program Manager	Calgary Catholic Immigration Society
James Michi	Executive Director	Hillhurst Sunnyside Community Association
Lindsay Mitchell	Alumni	Leadership Calgary
Lisa Nagy	Community Development Worker	City of Calgary
Lesli Peddie	Community Support	Calgary SCOPE Society
Shirley Purves	Executive Director	Aspen Family and Community Network Society
LeeAnne Sicker	Executive Director	Urban Society For Aboriginal Youth
Lisa Somers	Director of Client Services	Southern Alberta Brain Injury Society

Buffy St.Amand	Manager, Leadership Calgary	Volunteer Calgary
Beba Svirig	Executive Director	

Grande Prairie

Name	Title	Organization
Keith Curtis	Board Chair	Community Foundation of Greater Grande Prairie
Helen Ficocelli	Executive Director	The Cool Aid Society of Grande Prairie
Rocco Grasso	Executive Director	Mountain Plains Community Services Society of the North
Lisa Heck	Revenue Development Coordinator	Canadian Cancer Society
Callie Hickey	Community Housing Assistant	City of Grande Prairie (FCSS)
Krista Hurta	Project Coordinator	Grande Prairie John Howard Society
Sonya Kobelsky	Executive Director	Grande Prairie Friendship Centre
Delaine Lambert	UMAYC Coordinator	Grande Prairie Friendship Centre
Melodie Mccracken	Executive Director	Society for Support to Pregnant and Parenting Teens
Penny Mickanuck	Executive Director	Grande Prairie John Howard Society
Someh Niengor	Executive Director	Grande Prairie Youth Emergency Shelter
Tanya Samizadeh	Project Coordinator	The Community Village
Marietta Stephen	Executive Director	A Bright Beginnings Child Care
Shantel Whiles	Assistant Executive Director	Mountain Plains Community Services Society of the North

Appendix B

Background paper to the focus groups

November 2009

Background and purpose

The leadership situation in the voluntary sector has been described as facing a crisis. Demographic trends will result in a surge of retirements in the sector over the next ten years, and the expected labour shortage threatens to reduce the number of potential replacements. Despite this, in many organizations, no logical successor is coming up through the ranks.

A range of formal training and learning opportunities exists in Saskatchewan and Alberta to support the development and enhancement of leadership skills within the sector. However, representatives of the sector indicate there are challenges in accessing opportunities for leadership development, and educational institutions report low levels of enrolment. Therefore the purpose of this project is to gain a better understanding of the apparent disconnect between the demand and supply for leadership training and development.

This paper poses sets of questions that will form the discussion in focus groups across the two provinces.

What makes a good leader?

Given the change in theories of leadership over time, and the diversity of the voluntary sector, it is difficult to find consensus amongst researchers on a definition of leadership. Various researchers have strived to define the skills required to be a leader in the sector, but typically with the rider that requirements depend on the type and size of an organization and the stage of its development. In other words, not all skills apply to all people in all circumstances at the same time. Perhaps for these reasons, leadership training programs try to focus on a set of standard skills, such as decision-making, problem-solving, managing power and influence and building relationships.

A study of leadership competencies by the Voluntary Sector Initiative identified the following clusters of knowledge and skills.

- **Beliefs and values** (social responsibility, sustainability and self-sufficiency, building capacity, individual ethical and principled behaviour, inclusion and diversity, passion and compassion, courage)
- **Vision and alignment** (vision, ethical/value orientated decisions, public action, public policy, external relations, global issues, culture of learning)
- **Strategies and resource management** (fund raising, financial stewardship, marketing and public relations, information and communication technology, research, planning and evaluation)
- **Relationships** (interpersonal relationships, communication, political acumen/savvy, public persona, human resources, team development, healthy workplace environment, collaboration)
- **Complexity** (creative and innovative culture, adaptation to change, multiple accountabilities, interdependent perspective, awareness of context, cooperation and competition)

Questions to consider: what, if any adjustments would you make to this list? How would you identify the requisite skills in a potential leader? What is the best way to develop those skills?

How will changes in society affect leadership in the future?

Emerging social, economic and demographic trends may affect the make-up of future leaders of the non-profit sector and the skills they will require.

- A decline in the size of the labour force will increase competition for jobs
- As Canada becomes more multicultural, leaders will have to be more skilled in drawing people of diverse backgrounds, perspectives and languages together to meet common goals
- Values and job commitment are changing, as more young people make a work-life balance a priority
- Increasingly, leaders have to build capacity at the community or neighbourhood level and forge connections between the non-profit and the government and private sectors
- The issues may become so complex or specialized as to require a team approach to leadership

Questions to consider: what impact will these trends have on leadership selection, training and development? If this is the future, are today's leaders equipped to train and develop the leaders of tomorrow? What actions would be helpful to leaders of today in developing the leaders that will follow?

What is leadership development and how does it occur?

United Way Toronto refers to leadership development as “the strategies, approaches and programs designed to develop and enhance the leadership skills and capabilities of individuals.”

There are a number of reasons suggested as to why courses offered by educational institutions have not always attracted the level of interest that was hoped. They include:

- Courses are not readily accessible for reasons of location, cost, scheduling or lack of flexibility
- Individuals are unable take courses during work hours because of work demands, or lack of organizational support for professional development and courses offered outside work hours often conflict with personal or family demands
- There is doubt, by an individual or organization, as to whether the training will be readily transferable or there is a concern about the quality of the instruction being offered

Questions to consider: What have been your experiences with leadership development programs offered by educational institutions? What features need to be in place for them to be successful?

Off-site formal training can often be replaced or supplemented by activities such as:

- Peer learning circles
- Mentoring
- Secondments or special assignments
- Coaching
- Job shadowing
- Self-directed studies, such as on-line training
- Action learning rooted in "real" work opportunities

Questions to consider: What examples of this less formal approach to leadership development are you aware of? What information or resources would assist organizations in improving these approaches to leadership development?

The Council is also aware of examples where private companies, large non-profit organizations or government departments will offer training spaces to people in the voluntary sector when a program cannot be filled internally.

Questions to consider: have you had opportunities to accept offers of training spaces? From your experience what are the drawbacks and benefits? Do you think that the practice should be encouraged and expanded? If so, what further actions would be appropriate?

Why isn't succession planning a more common practice?

Closely tied to leadership development succession planning is a sound risk management practice, yet one that very few voluntary sector organizations put into place. There are many advantages to succession planning, including:

- It helps to align an organization's recruitment and professional development activities to its strategic vision and directions
- It contributes to organizational stability and viability, especially in the event of a key manager's unplanned absence
- It can strengthen the sector or a group of organizations by extending the development opportunities available to employees, making it possible for employees to migrate to a job elsewhere and return more qualified
- Funders often look on succession planning as a positive sign that the organization will survive

There are several reasons offered as to why succession planning is not a more common practice.

- Executive directors and boards do not have sufficient knowledge to develop such a plan or do not see it as important
- Organizations consider themselves too small to support a succession plan, or believe that there is no one presently within the organization who is a likely candidate
- Executive directors may fear compromising their authority or become a lame duck

Questions to consider: what explanations do you hear for succession planning not being such a common practice? Are there examples of best practice in succession planning that you are aware of? How did it work and why? What information or resources would assist organizations in improving succession planning?

Appendix C

Interview questions with educational stakeholders

1. Please describe the program(s) or course(s) currently or formerly offered that includes/ included a leadership development component, in whole or in part, to a target audience of Executive Directors or aspiring Executive Directors of nonprofit organizations.
2. Was a feasibility study undertaken within the nonprofit sector before offering the program or course? If so, what were the major findings of that study?
3. Are there or were there challenges for your organization/institution to recruit and retain nonprofit sector participants for this program? If so, please describe the challenges.
4. Is there (or was there) a profile of the nonprofit sector participants? (age, sex, occupation, nature of the nonprofit organization, etc.)
5. To your knowledge, were the students satisfied with the program or course content?
6. If the program or course has now ended due to a lack of registrations, would you or could you have done anything differently to ensure greater participation?
7. Do you think there is going to be a deficit of paid leaders in senior management positions in the nonprofit sector in the next 10 years? If so, why do you believe that will be the case?
8. What role do you think educational institutions/umbrella organizations/community based leadership programs/independent organizations can or should be playing to foster leadership development in the nonprofit sector?
9. Do you see new approaches or new ways to overcome any identified barriers to leadership learning in the nonprofit sector in the future?
10. Do you believe leadership development and training can be done cross-sectorally (with nonprofits, for-profits and government)? Why are why not?
11. Do you have other comments or suggestions to make regarding leadership development and learning in the nonprofit sector?

Appendix D

Leadership course descriptions

Mount Royal University, Calgary

Mount Royal launched Canada's first institute for Nonprofit Studies in 2000. As of 2010/2011 Mount Royal will offer a minor in Nonprofit Management for students pursuing any degree in any program or discipline at the University.

The institute has four core elements: education program (credit and non-credit); research; community engagement; endowment.

Mount Royal has just started a Nonprofit Executive in Residence to "promote innovation and learning through the exchange of knowledge, information and experiences among members of academia, business and industry." A defining feature of the residency is its role in connecting the university and the community, including research opportunities.

The university also offers two extension certificates through continuing education - Nonprofit Management and Leadership.

Participant profile: One third are early career/entry level staff in the nonprofit sector; one third are in their late twenties, working in either the nonprofit or private sector; and one third are over the age of 35 years and ready to assume positions of executive director.

University of Regina, Business and Professional Development Centre of Continuing Education, Saskatchewan

The University has a number of offerings that the nonprofit sector can access through the Centre for Continuing Education (though not targeted specifically at the nonprofit sector). These include:

- Professional Leadership Certificate – Based on two streams, professional leadership (career development) and personal development
- Johnson-Shoyama Graduate School of Public Policy
- The Saskatchewan Institute of Health Leadership – We should note that though this program is focused on the health sector it is worth looking at by the nonprofit sector (a joint initiative of the Universities of Saskatchewan and Regina along with four core partners)
- Range of courses offered from 9-4:30 PM that attract a wide range of middle management staff

Participant profile: Only 1% of participants for the Professional Leadership Certificate come from the nonprofit sector.

Grant MacEwan School of Business, Edmonton

Grant MacEwan offers an Executive Leadership in the Nonprofit Sector post diploma certificate program that requires 20 months to complete. The program consists of seven courses and is offered in a hybrid model with both classroom sessions and on-line delivery. The courses cover executive leadership, organizational and community development, board governance and leadership, human resources, financial and fund development and public affairs.

Participant profile: The program is attracting mid-level managers, with some entry level, from the nonprofit sector. They have had a few Executive Directors of small organizations who do not have post-secondary credentials so looking for a diploma.

Executive Directions, Calgary

The Executive Directions Program is a facilitated process of teaching and learning together. It brings together a group of fifteen people who make a two-year commitment, meeting every month for both a group meeting and an individual session.

The program includes: monthly, full day round table meeting; workshops and resources; cohort – colleagues commit to working together over a two-year period; one on one sessions with a experienced coach; and a personal growth plan.

Participant profile: The program is designed for and attracts Executive Directors, Presidents and General Managers of recognized charities of nonprofits – and people willing and able to make a two-year commitment.

Canadian Community Leadership Network

Community Leadership Programs promote and encourage community leadership by developing the leadership capabilities of citizens who care about the community, who understand its strengths and weaknesses, and who are willing to make a personal commitment to improve a community's quality of life.

The Network was developed and evaluated through JW McConnell Foundation funding. Each program across Canada (and internationally) share four core characteristics: identify rising decision-makers/leaders from all sectors; owned by the broader community; involve a mix of sectors; and follow the same format of a six to ten month period that includes workshops, training days, a community project, and ongoing involvement of the alumni.

Leadership Calgary

Leadership Calgary is in its eleventh year and rests within Volunteer Calgary. A group of Champions was established to guide, develop and promote the program. The time commitment for the program is approximately 100 hours including 40-50 hours over a 10-month period plus one day per month meetings, a 3-day retreat and a 2-day closing.

All sectors in the community participate in the program, with a strong focus on ensuring a mix of one-third nonprofit, one-third public and one-third private sector. The program has four components: developing increased personal leadership capacities; increasing awareness of community challenges and assets; encouraging the formation of a cross-sector network of leaders; and motivating people to take action in their community.

Participant profile: Coming from one of the three sectors noted, with an average age of 30-39 years old. They are established in their career and trying to connect with community. The program is working to recruit younger and more diverse participants.

Leadership Saskatoon/Volunteer Saskatoon, Saskatchewan

Leadership Saskatoon was founded in 2000, supported initially through McConnell Foundation and three founding partners: University of Saskatchewan, the Greater Saskatoon Chamber of Commerce, and the Saskatoon Community Foundation.

The program is organized around the core characteristics for community leadership programs as outlined above. Unlike Leadership Calgary, it has limited participation from the nonprofit sector.

Participant profile: Only three to four participants in the current class of 28 come from the nonprofit sector.

HR Council
for the Nonprofit Sector