

Nonprofit Leadership Skills Training to Offer *Your Employees*



NonprofitLibrary

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Introduction

I vividly remember my very first day at my very first nonprofit fundraising job. It was February 1988. I was so excited. I was to be the Director of Corporate Relations for the engineering school at a large, private university. I got to the campus and made my way to my Dean's office, where I had been told to report. The Dean was friendly but vague about his expectations and my duties.

"Get settled," he told me. "Then in a week or so, we'll get together."

Compared to my boss, however, he was a font of information. My boss, the Executive Director of Development for the school, then showed me to my office, punched me in the shoulder and said (and this is an exact quote): "Make money, kid." He then informed me that he would be off for the next three months.

Great. I didn't have a clue as to what I was supposed to do.

I figured things out—but not everything and certainly not some things that would have made my life easier, not just there but at subsequent positions. And when I became the boss, I was determined not to let my staff flounder, but to ensure that I provided them with the skills they needed, not just to do their jobs but also to navigate the often treacherous political waters that do roil every single organization.

As a nonprofit leader, part of your job is to ensure that your staff have the skills both hard and soft and that they need to be successful in their jobs and to become leaders themselves. These include:

- Understanding their job description—and what they are expected to accomplish
- Having clarity about the mission of the organization
- Understanding how the organization is governed (and, yes, this includes how they should be interacting with the Board)
- The basics of nonprofit law and accounting
- Where to find needed information
- How to be a great ambassador for the organization
- Time Management

One resource that will be of great help to you are the many webinars and other resources at [CharityHowTo](#) as well as the ebooks available at Nonprofit Library.

LET'S START WITH THE MOST IMPORTANT OF WHAT YOUR EMPLOYEES NEED TO UNDERSTAND:

What their job description is all about, the skills they must master, and what they are expected to accomplish.



01. Understanding The Job Description

Many job descriptions, particularly those in smaller nonprofits, seem to work under the misconception that more is better. There are pages and pages of things the successful candidate will be responsible for, including that catch-all: **Other tasks as assigned.**

In many public institutions and agencies, job descriptions are centrally mandated and are focused on a class of jobs. This means that it may or may not be descriptive of the job you will actually be performing.

Even when the job description is very specific to a narrowly defined job (and this doesn't happen often in the nonprofit sector) they tend to be a list of duties and responsibilities, along with a title and the person to whom you will report. That's important, but the descriptions offer scant information on what you will actually be doing and how your performance will be evaluated.

BUILDING THE FOUNDATION

While this on the surface, may not sound like leadership skills training, it is the foundation on which your staff members can excel and become leaders. And, ensuring that your staff is the best they can be is a skill that every leader must have.

By modeling this skill to your staff, you are offering your employees great insight into what it means to be a true leader.

Whether you are talking with a new employee, or a staff member who has just received a promotion, or one who has been in the job for a while, if you have not provided a thorough job review and set expectations with your staff member, now is the best time to do this. And then, do it every year as you provide staff evaluations, which should be viewed as a positive, leadership training for them rather than the time for them to be shaking in their boots, wondering what they didn't do right.

Making sure that your staff understands what they are expected to accomplish and what the priorities are for what they are to do is essential.

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For example, many nonprofits hire development directors with job descriptions that include everything AND the kitchen sink. There is an expectation that this person will increase fundraising by some huge amount by overseeing events, writing grants, building a major gift program and increasing annual giving all by him or herself. I look at these job descriptions and know that there is a sad misunderstanding about fundraising, and that the person who takes this job won't actually succeed.

EXPLAINING EXPECTATIONS

Instead of letting this person flail about, you can help that person become a leader by ensuring he or she has clarity on what you expect them to focus on. If you feel that the most important thing your development director can do would be to increase individual giving—tell them that. And work with them to explore how that can be done.

It's not enough to say you must accomplish this. Among the leadership skills you should be offering your employees by ensuring they have the knowledge to figure out how to do their job.

That means identifying the skills needed to accomplish the tasks you've identified together and ensuring that your staff member has the requisite skills. It also means setting clear goals and metrics for projects and setting up a system to track progress.

Teaching your staff to set appropriate goals, create benchmarks and measurable outcomes, and having a way for them to stay on track will provide them with skills that will allow them to take on leadership roles in the future.



02.

Having Clarity About Mission

Raising money for an organization, running programs, or performing administrative tasks, means working to help move the mission forward. But all too often, staff members don't actually understand the mission or purpose of the organization and don't always have clarity about what the organization accomplishes.

Ensuring that each and every staff member understands not just the purpose of the organization but why it matters and how it fulfills its goals is essential.

Being able to articulate the organization's mission is a skill that is crucial for success. That means that you must teach your staff about the mission and help them to be able to speak in a way that pushes your mission forward.

COMMUNICATION SKILLS

Getting people excited about your mission takes a lot more than an elevator speech. It encompasses communication skills that allow your staff to have actual conversations with potential supporters and advocates. And in order to do that, they must be able to discuss your programs and your accomplishments.

Discussing, mind you, is not the same as giving a recital of what your organization does. It is being able to have a conversation about your work and, especially, finding out what is of interest to the other person. It's having the ability to answer hard questions, talk about the exciting challenges facing your organization, and helping the other person see how they might fit in.

THE IMPORTANCE OF LISTENING

Talking is one thing, but it is also important to be able to listen to what others are saying and to hear what is really of interest.

Too often, we listen just to be able to respond and turn the conversation back to us. For many nonprofit staff members, "us" is the organization, the clients we serve, and the needs we must meet in order to do our work.

But if you are not tracking what matters to your audience, you are not communicating, and you are not bringing people closer. Leaders understand this, and it is a skill you want your staff to learn.

An easy listening exercise would be to put your staff into dyads (two people) and have one person take 2 minutes to tell the other person about a project they are working on or a vacation they are looking forward to. Then have the listener take 45 seconds to tell the speaker what she heard. And then have them switch roles.



WRITTEN COMMUNICATION

A lot of communications happen in writing — from formal letters and reports to informal email and texts. Clarity in written communication is a hallmark of a leader and is a skill your staff needs to have. This includes good grammar as well as cultural sensitivity.

Effective written communication starts by understanding who the audience is. Writing to a friend is different than writing to a colleague. Your staff should be trained in what is appropriate – and what is not. This is the tone of your written communication and you want to ensure that your staff understands what tone they must be using when communicating with different audiences.



They must also understand e-communications. When working with younger staff, this sometimes gets tetchy. They feel, because they are “digital natives” they understand better than, well, OK... Boomers. But if email is being used for business purposes, you must be more careful than you need to be with a friend.

While there are many pointers you can give your staff about email etiquette—including proper punctuation, scrapping those emojis, good grammar—perhaps the most important is avoiding sarcasm or irony. Too often, this can lead to misinterpretation and coming off as non-professional. Do yourself and your staff a favor and remind them that this and most humor is best served in-person where the recipient can actually hear your tone of voice and your facial expressions and other body language.

We write things (including email) to provide others with information. This is easily done if your staff remembers the old 5W’s and an H: Who, What, When, Where, Why, and How. Making sure that all written communication by your staff contains these points and you will be offering them great leadership training.

BEYOND WORDS

Not all communication is verbal, of course, and training your staff in the importance of nonverbal communication is an important leadership skill you can offer to them.

Leaders tend not to fidget, make faces, or slouch. They stand straight, look you in the eye. Leaders appear to be comfortable in their own skin, but they do dress to impress. That doesn't always mean an expensive article of clothing. It does mean that the clothes a leader wears is clean, appropriate, well fitting.

In today's world, it is very important that you offer your employees training in appropriate communication skills, both verbal and nonverbal. For nonprofits, this often starts with our mission and ensures that everything we write and say is in service of that.



03 • How the organization is governed

Part of leadership skills training is ensuring that your staff understand how the organization functions. That means they should be clear how it is governed and who is in charge of what.

At most nonprofits, the board of directors (or trustees) is at the top of the food chain. They are the people who set the strategic direction and have the ultimate oversight for the organization. However, that doesn't mean that they are the group a staff member should go to if he or she is having a problem with another staff member, or even with their ultimate boss, the CEO.

The Board has one employee: The CEO. The CEO, in turn, hires—with the approval of the board—the rest of the staff. The staff, either directly or indirectly, all report to the CEO. A good CEO empowers managers and allows them to hire and supervise their direct reports.

MANAGEMENT STYLES

While there are many management styles, effective organizations tend to function somewhat hierarchically. While a great organization encourages flow

of information and ideas both downward from the top AND upward from the bottom, there are certain protocols that should be followed.

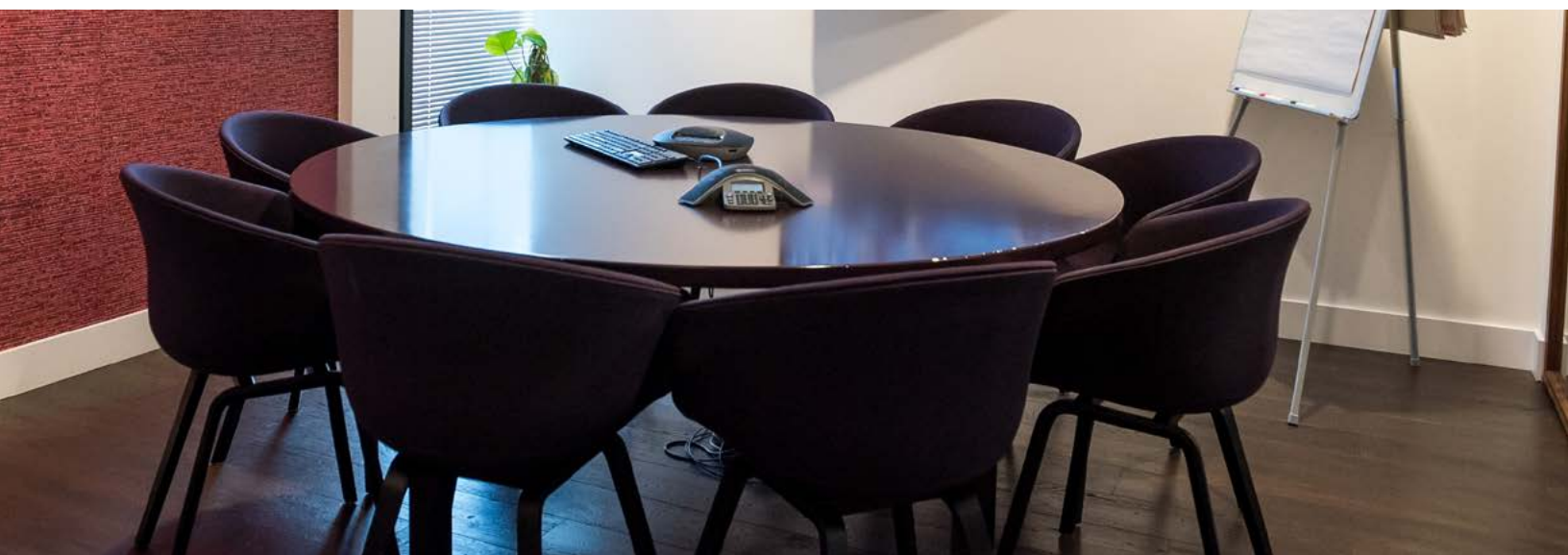
Stephen Sample, the late former President of USC, wrote in his book the Contrarian's Guide to Leadership, that while he would listen to any employee, he would never resolve a dispute, make a decision, etc. without first engaging with that employee's direct boss. This is in large part why he was recognized as such a strong leader.

Too often, board members try to "jump that line," and tell the CEO how to manage, reward, and discipline staff. To help avoid this, employees must be trained to know how things work at your organization. This is a leadership skill that you must impart both to your employees and, yes, to your Board members.

WHO DOES WHAT?

Every organization works in its own peculiar way. Making sure that your staff understands how the lines of authority work in your organization will not only help you to develop leadership within your staff, it will help you to avoid a lot of headaches.

In simplest terms, the Board looks at the big picture and sets strategy, while the CEO develops the plans for how to implement that strategy, and the staff does much of the actual day to day work. More specifically, some of the ways the Board and CEO ensure effective management include:



BOARD	CEO
<i>Sets mission, vision, and approves the strategic plan</i>	<i>Provides input and insight for strategic issues and ensures these issues are implemented and followed on a daily basis</i>
<i>Hires, nurtures, and sometimes fires the CEO</i>	<i>Hires, nurtures, and sometimes fires — or helps managers to fire — staff</i>
<i>Provides oversight to ensure that resources and assets of the organization are utilized properly.</i>	<i>Conducts the day to day operations of the organization</i>
<i>Sets fiscal policies and ensure internal controls</i>	<i>Provides financial management</i>
<i>Approves annual budget and reviews (carefully!) financial reports</i>	<i>Prepares budget and oversees financial reports</i>
<i>Provides oversight to ensure programs are achieving objectives</i>	<i>Oversees the development and implementation of programs and evidence of program effectiveness</i>
<i>Support fundraising activities</i>	<i>Manages development and execution of fundraising strategies</i>
<i>Ensures appropriate succession for the CEO and, especially, board member</i>	<i>Ensures appropriate succession plans for his position and for board members</i>
<i>Evaluates CEO, themselves, and the board as a whole</i>	<i>Ensures that staff have annual evaluations</i>

Of course, there are many more things that could be added to each column. The main point is that an effective CEO makes sure that her staff knows the difference between Board and CEO roles and works with the CEO when and if Board members overstep their boundaries.

04. The Basics Of Nonprofit Law And Accounting

BOARD MEMBERS MUST ADHERE TO THREE DUTIES:

- The duty of due care
- The duty of obedience
- The duty of loyalty

These are fiduciary responsibilities that ensure that the organization is run well, follows appropriate laws, and works for the good of the organization. Staff need to understand these duties and to follow them as well. To do that, employees must have a working knowledge of the laws that govern nonprofits and how nonprofit accounting works.

THE LEGAL SIDE OF THINGS

Nonprofits, like all of us, have to comply with local, state, and federal laws. While the IRS defines what type of nonprofit your organization is, your corporation operates according to state law. And yes, laws vary from state to state. Your staff needs to understand that and recognize that if, for example,

your nonprofit is registered in Ohio and is also collecting money, holding an event, or running programs in Nebraska, then there is probably additional registration required.

They don't need to know all the details, but as you are training them in leadership skills, always think—and have them think—about the bigger picture.

There are about 29 different types of nonprofits, all of which are exempt from some federal income taxes. While not every staff member needs to be conversant with every detail of the IRS code, they all should have clarity about what type of a 501(c) organization you are and broadly what that means.

For example, if you are (as most of our organizations are) a 501(c)3 organization, you want to ensure that your staff—especially those you are training for leadership roles—understand that means the organization may not participate in political campaigns. To do so would jeopardize your nonprofit status.

If, however, you are a 501(c)4 organization, within certain guidelines you can lobby and you can support a particular candidate for election.

YOUR ORGANIZATION'S BYLAWS

Too often, a nonprofit's bylaws were something put together when the organization first got its 501(c) status and never looked at again. I have asked organizations for a copy of their bylaws, only to discover there was not a copy to be found.

In fact, your bylaws are much more than a hoop you must jump through to appease your secretary of state. They are your overall organizational handbook and help to guide you through an orderly and effective operation of your nonprofit. Every staff member should be given a copy of the bylaws and told to read them and ensure that the work you are doing complies with that very important document.

MONEY MATTERS

Nonprofit accounting is different than for profit accounting. It is also very much the same. Both track credits and debits, account for ongoing business expenses. But for profits and nonprofits use different financial statements:

FOR PROFIT COMPANIES	NONPROFIT ENTITIES
Balance Sheet	Statement of Financial Position
Profit/Loss Statement	Statement of Activities
Statement of Cash Flows	Ditto — the one that stays the same
Statement of Owners' Equity	Change in Net Assets

The most important difference for accounting is the issue of ownership.


In a for profit company, individuals (and other entities) can own equity, which is percentages or shares of the company. And these owners expect to get a positive financial return on their investments. In the nonprofit world, there are no owners. The organization is run by the board and staff as a public trust.



FUND ACCOUNTING

The second big difference between for profit and nonprofit accounting is the concept of fund accounting. For profit organizations focus on profitability while nonprofits are concerned with accountability. One way to be accountable is to ensure that is through Fund accounting. Fund accounting ensures that revenue that comes into the nonprofit goes into specific funds. The general or unrestricted fund can be used for whatever the organization needs as long as it stays within the mission of the nonprofit. Typically, these are the operational funds.

Other funds are restricted and can only be used for the stated purpose. Only donors—both individual and institutional — can place a restriction on revenue. The grants your organization receives usually are restricted. Even if you get a “core operations” grant — something that is becoming more common—the grant will define specific operations that may be covered. Smaller gifts from individuals are unrestricted, while larger, major gifts are likely to carry specific restrictions.



Fund accounting ensures that revenue that comes into the nonprofit goes into specific funds.

05.

Where to Find Needed Information

Confession Time: I watch and read a lot of crime tv shows, movies, and novels. One thing that never fails to impress me is when the more senior police officer tells the rest of the team to check something out, get some data, track something down, the rest of the team nods and gets to it.

As someone who was a manager for over 40 years, I find that amazing. I would tell my staff to do something, find something, check something, and as often as not I would get blank stares.

Something all managers should aspire to is employees who know what tools are available, how to utilize them, and what are the best ways to find needed information.

These are leadership skills training you must offer your employees! It starts by ensuring that every employee knows not just what the organization does, but how it does what it does. When I worked in higher education, the staff pretty uniformly understood that what we did was teach students. Most of us also knew that many of the faculty did research.

But it seemed that few of us outside of the various departments knew how admissions worked—and what beside admitting students to the institution happened there. Student services? For many, a black hole.

WHAT HAPPENS WHERE?

Alas, this black hole exists in many nonprofits. Staff know broadly what the organization does. They probably understand what certain individuals do. They know what his or her department is charged with doing. Sadly, they might not know anything else about the organization.

Recently, a development director confided in me that she had lost a really big gift. The donor was particularly interested in one type of program. The development director was sure that the organization did not work in that area. She guided the donor to an organization that did. However, she discovered much too late that indeed, the organization had just started such a program, and the charitable gift from this generous donor would have been nothing short of a miracle.

Making sure that your employees know what happens in every department and who is the “go to” person in each area will help to ensure that your staff isn’t giving out the wrong information.

One important way to do this is to have a really robust orientation when someone starts at your organization. This orientation shouldn’t just be one or two hours. In fact, consider two or three days to get the person truly positioned.

Another way is to invite representatives of the various departments in your organization to present on what they do at a staff meeting. Talk with the presenter about what you want the rest of the employees to learn.

One thing that really worked for me as a manager was—as we were reviewing the employee’s job description—to have them jot down what kinds of information they would likely be needing. I might add to that, then I would send them on a “treasure hunt” to find out where they could best get information they needed. Making them find out by themselves had the added benefit of providing skills that helped them figure out the best ways for them to get what they required from others.



06. How to Be A Great Ambassador for The Organization

Peter Drucker, the world-famous management guru, frequently noted that **“culture eats strategy for lunch.”** This is particularly true when we talk about a “culture of philanthropy.” In my years of working in the field, I have seen that the most successful nonprofit organizations were those that have that culture.

But what does that actually mean?

A CULTURE OF PHILANTHROPY

While there are a number of factors that contribute to a philanthropic culture, these three are at the very top of the list:

- Fundraising sits at the center of the organization: Everyone (yes, that includes staff) must be committed to getting and giving charitable gifts.
- Everyone at the organization can talk about why and what the organization needs to fulfill its mission — and how the potential donor can join with the organization to make that happen.
- Everyone — regardless of role — sees him or herself as an organizational ambassador — helping to identify new prospects and partners

One of the most important skills for an ambassador is being able to talk about the organization's mission and to communicate why the organization is successful. Ambassadors also need to understand the nuts and bolts such as how the organization is governed, what programs you have, how they are measured. By ensuring that your employees have been trained in leadership skills we've previously discussed, you will also be ensuring that they can be great ambassadors.

EXTERNAL AMBASSADORS

Not so long ago, I called a nonprofit client and asked for the development director. The person answering the phone had no idea who I was or what I wanted, but simply told me "He's out. Call back in an hour." And then that person hung up the phone.

Beyond being a poor Ambassador for the organization, that person could have turned off a potential large donor or foundation program officer — who could have been calling to say they had more money than anticipated and wanted to talk about a possible grant. At the very least, whoever was calling, would have (as I did) a bad feeling about the organization.

Ambassadors are also the face of the organization to the outside world. By their actions, they interest others in being involved. They invite people to join them in supporting the organization with their time, their talents, and their treasure.

INTERNAL AMBASSADORS

Yes, ambassadors are often out there in or speaking to the public. But internal Ambassadors are equally important. These are the people who take it upon themselves to make sure that others inside the organization know of all the good things that are happening.

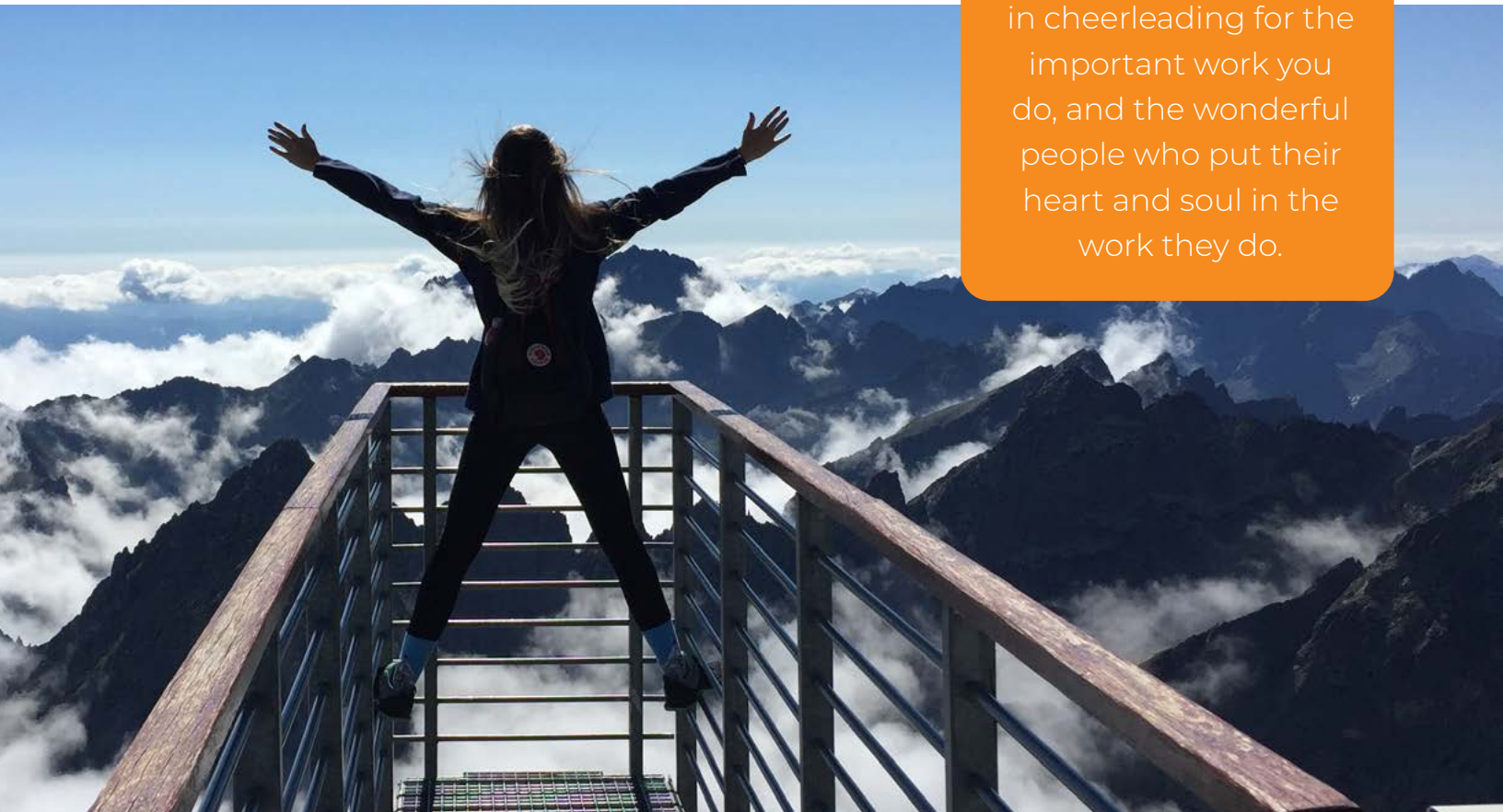
MOST GREAT LEADERS ARE ALSO GREAT INTERNAL AMBASSADORS.

They see that recognition is given to those who go beyond and do more for the organization than that which is required. They share successes and take on responsibility for those things that are not so successful. They create teams, encourage creativity, and help make employees more efficient and effective.

Make sure that you offer leadership skills in cheerleading for the important work you do, and the wonderful people who put their heart and soul in the work they do.

TIP:

Make sure that you offer leadership skills in cheerleading for the important work you do, and the wonderful people who put their heart and soul in the work they do.





Time Management

“Busy” is the buzzword of the day. Maybe of the century. We are all so busy busy busy. And for many nonprofits, resources are short. Boards love it when the organization runs lean. On the plus side, this could mean more money for programs. On the minus—well, let me count the ways. If “busy” is the big buzzword, “frazzled” is the one that defines most nonprofit employees. Consequently, if you want to train your staff in nonprofit leadership skills, time management should definitely be on that list.

When I first moved from working in the for-profit world to my first fundraising job in a university, I was shocked to discover that the word immediately — as in “I need this immediately ”— seemed to have no meaning. Things that I really needed ASAP didn’t show up until the next semester, often too late for my purposes.

As a consultant, I am always amazed at how the vast majority of my clients (and would be clients) seem to have no notion of timeliness. I get panicky calls in December because the development staff hasn’t managed to put together an end of the year appeal. Donors don’t get thanked for weeks on end, or sometimes ever. Grant and government contract reports are

filed late. Sometimes very late. I pride myself on not missing deadlines. For most of the nonprofit world it appears that deadlines are like traffic laws in Italy—totally optional.

BEING TIMELY

I'm not trying to badmouth nonprofits or their employees. I am saying that if you want to help your employees move into leadership positions, they need to grasp the importance of doing things on or before time, and that means knowing how to manage their time.

There are tons of time management books, apps, coaches out there. Each of your employees may resonate with different ones.

Over the years, I've tried a lot of them. Most didn't work for me. As a minimalist, I am always looking for the thing that has less—fewer moving parts, fewer steps to take to get me where I want to go. But that is not right for everyone.

What is right is to train your staff to value others time. That means ensuring that not only are their deadlines, but that you set benchmarks that must be reached on the way to reaching where they need to go. In that way, they will learn the value of managing their time.

TRAIN YOUR STAFF

Ensure that there are deadlines, but that you also set benchmarks that must be reached on the way to reaching where they need to go.



A close-up photograph of two hands, one from a person with dark skin and one from a person with light skin, shaking in a firm grip. The hands are positioned in the upper half of the page, with the word 'Conclusion' overlaid in a white script font.

Conclusion

If you do an internet search on Leadership skills, you will find articles and blog posts that talk about things like Motivation, Creativity, Delegating, Empathy, Active Listening, etc. And many of these are great skills for leaders to possess. I'm suggesting that you offer more concrete leadership skills training.

To be a leader means being able to see around corners and get the full picture of what is going on in your organization. It is understanding that all parts of who you are and what you do — the “you” as in your nonprofit organization—are intertwined, and the more you know about each part, the more effective you can be.

It truly starts with employees understanding their job description. I say (and write) this a lot, but as baseball legend Yogi Berra, known for his turn of phrase, famously said, “If you don’t know where you are going, you may end up somewhere else.” A job description is the most important roadmap your employees have, and it is critical that they understand how to read that map.

Knowing their job, however, would be unimportant if they didn’t have clarity about why what they do matters. Understanding the mission of the organization makes it easier to connect the dots.

All the skills we’ve described will help your staff to do a better job. Make sure you offer these leadership skills to your employees so they—and your organization — will shine.

And don’t forget to encourage them to join [CharityHowTo](#), seek out pertinent webinars, and download books and other resources from [Nonprofit Library](#) that will help them become better leaders.

Meet the Author

Janet Levine of [Janet Levine Consulting](#) has worked with hundreds of nonprofit organizations taking them from mired to inspired. Janet focuses on working with staff and boards to increase fundraising capacity and build sustainability. Her philosophy is one of collaboration. Working closely with her clients to develop and implement comprehensive programs that fit the needs and resources of the organization.

Janet began her development career in 1988 at the School of Engineering at USC. She held senior advancement positions at the Reason Foundation, the University of Oregon, the American Film Institution, El Camino College and Pasadena City College. Just prior to opening Janet Levine Consulting in September of 2007, Janet served as Vice President of University Advancement at Cal State Dominguez Hills.

Clients run the gamut from small, all volunteer organizations to large, national organizations. Of special pride is the number of clients who hire Janet Levine Consulting for follow on assignments.

In addition to her consulting practice, Janet regularly leads workshops in fundraising and board development across Southern California. She has taught in the Fundraising Certificate program at UCLA and facilitates four online courses (Get Grants, Introduction to Nonprofit Management, Marketing Your Nonprofit, and Essentials of Fund Development) that are available through libraries, universities and colleges in the US and overseas. She is also a sought-after presenter at professional conferences. She is also the co-author of *Compelling Conversations for Fundraisers*, available at Amazon, and this ebook and others are available as free resources of Nonprofit Library.

For more from Janet Levine, visit her [website](#).



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