

Leadership development in not-for-profit strategic plans



Many not-for-profit organizations recruit groups of talented professionals as volunteers whom work together to manage complex operations. Recruiting, training and retaining the most skilled professionals who can work effectively together, and whom share common values and intent is vital for any not-profit. Leadership skills are a key element in each board position and among staff.

In Canada, a charitable organization managing nearly \$30 million Canadian wanted to develop a strategic plan that included individual, organizational and community leadership strategic directions. With organizational, community and individual leadership as a priority, strong leadership and a full understanding of individual and group leadership traits was very important.

The Executive Director was very interested in using the High Potential Traits Instrument (HPTI) assessment, as he was relatively new to the organization, and could clearly see the potential of using HPTI to discuss individual and group leadership traits. The board and staff were high functioning, and there were myriad opportunities to fine tune individual, committee and group performance, using HPTI.

Using the (HPTI) provided an opportunity for the board and staff members to consider their individual leadership traits and profile. We first attended a board and staff meeting to discuss HPTI and the reasons for using the assessment as part of the strategic plan. All participants we provided with a detailed set of instructions to complete the assessment, including timeframes for completion, individual debriefs and group discussions as part of the strategic planning session.

Each individual first received their own HPTI to read and review prior to the telephone discussion of their results. The individual debriefs were very effective in several ways. Each participant had an opportunity to complete their assessment and have a 30 - 45 minute discussion about their results. This process provides a forum for individual self-assessment of leadership traits and how individual traits and the resulting behaviours help and hinder their performance, and their impact on their colleagues and the organization.

From the individual results, we created a group Leadership Capacity Report that showed the range of results. These results demonstrated a strong alignment in many traits, with sufficient difference to ensure some diversity in individual behaviour, intent and method of operation.

The team report shows this group is conscientious. They effectively plan and implement, and the organization's board and committee structure, combined with comprehensive policy and procedures confirms that their recruitment, selection and performance review system has resulted in the right people in the right positions.

The team's adjustment scores demonstrate their ability to manage the demands of investing and distributing funds in a well-planned and non-reactive way. The curiosity results suggest that group has a strong similarity in their more mild curiosity. They may

be slightly inclined to follow tried and true policies, and in an organization that is focussed on financial management, and good decision-making, these results confirm strong alignment between individual traits and organizational mission and vision.

Courage and ambiguity acceptance show more range of results. These results indicate traits that support some measured risk-taking. Ambiguity acceptance has the largest range of results, confirming that board and staff members have some differences in their comfort with diverse opinions and viewpoints.

The competitiveness results are much lower than you might expect. However, in a charitable organization, with the following mission statement, high individual competitive scores would not provide the fit required to meet the organizations mission and vision.

The use of HPTI with individual board and staff members, combined with its inclusion in the final strategic planning session was very effective. The individual and full board and staff discussions resulted in a series of strategic directions that highlighted the importance of carefully considering individual and group leadership traits and behaviours in recruitment, committee positions and structures, retention, succession planning and modelling leadership in the community.

Using the HPTI Team Report will support assessment, development and awareness of the importance of leadership in the organization and in the strategic plan. The process will confirm individual and team leadership traits; assess and discuss the capacity and capability to leverage leadership traits in meeting their strategic objectives; continue in building on demonstrated strong leadership.