Nonprofit Competency Model for Inclusive Leadership

Align mission-area expertise
with role-specific excellence.

Dorothy A. Johnson Center
FOR PHILANTHROPY

GRAND VALLEY
STATE UNIVERSITY

Dorothy A. Johnson Center for Philanthropy

The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University was established in 1992 with support from the W.K. Kellogg Foundation. Our mission is to be a global leader in helping individuals and organizations understand, strengthen, and advance philanthropy, resulting in a smart, adaptive sector that helps create strong, inclusive communities.

We put research to work with and for professionals across the country and the world. Through professional education offerings; research, evaluation, and consulting services; and bold thinking to advance the field, we support a philanthropic ecosystem defined by effective philanthropy, strong nonprofits, and informed community change.

Nonprofit Competency Model for Inclusive Leadership

Resources to Support a More Inclusive Workforce for Philanthropy

There are a variety of routes to a career in the nonprofit sector. People become leaders by leveraging undergraduate and graduate degrees, working their way up through organizations, and, particularly in the case of board service, through personal and professional connections. Once you're in, performance and promotion practices vary widely in method and quality.

The paths to these positions have contributed to a sector whose leadership is lacking in diversity — especially racial diversity — and by extension, inclusive leadership practices. Because competency models rely on KSAOs, they have the potential to contribute to a stronger, more diverse sector that leads with inclusiveness.

Many frameworks for nonprofit leadership already exist in the field. We've synthesized the collective wisdom of many organizations and tools — and our own decades of experience in nonprofit leadership — and integrated it all into two summative and interrelated tracks (one for nonprofit staff leaders, one for board members), with an emphasis on KSAOs that contribute to cultures of belonging.

We encourage you to use, adapt, and share this model to map your professional journey, structure position descriptions, design training programs, and so much more.

Interested in learning more? Let's talk.

The Johnson Center offers a variety of competency-based professional development — open courses, private courses for organizations and networks, and fully customized programs — to support you and your team.

Do you have questions about competency models or training opportunities? We're here to help. Give us a call at **(616) 331-7585** or email **jcp@gvsu.edu** to get started.

Introduction

What is a competency model?

A competency model delineates the knowledge, skills, abilities, and other characteristics (KSAOs) that are required for effective performance in a particular job or profession. Many fields/professions (e.g., human resources and social work) are already using competency models to frame and inform professional development activities and position descriptions.

Competency models typically delineate a limited number of high-level categories of KSAOs, then break these down into sub-competencies, and then identify the behaviors that demonstrate that an individual has this competency.

How do I use a competency model?

By defining the KSAOs that underpin effective performance, competency models enable those hiring or evaluating staff or designing professional development activities or other offerings to base decisions explicitly on the requirements of the position, thereby decreasing the influence of extraneous factors and unconscious bias.

How do I use this competency model?

This model is intended to be broad and widely applicable in scope. While the model narrows in focus as the user moves to the right, the depth of the model reaches to learning objectives under behaviors. It is then recommended that users of the model overlay specific lenses as it relates to their intended audience.

Definitions & Terminology

Competencies	The knowledge, skills, abilities, and other characteristics (KSAOs) that are required for effective performance in a particular job or profession.
Competency Model	A collection of competencies that are relevant to performance in a particular job, job family, or functional area.
Competency Dimension	A cluster of closely related competencies.
Sub-competencies	The competencies that comprise or are related to connected to a particular competency.
Behaviors	The observable activities demonstrated by individuals proficient in a particular competency.
Practice	The actual application or use of an idea, belief, or method, implying an understanding methods, approaches, and processes.
Stakeholder	A person or group with an interest or concern in the organization and/or its actions. This may include other staff members, donors, populations that the organization serves and/or is impacted by, and the broader community.

Sources: Campion et al., 2011; Shippmann et al., 2000

Competency Dimensions

In our model, there are three major sets of competencies, plus a fourth set of cross-cutting competencies that show up across the other three major areas:

Cross-Cutting	Financial Management	Strategic Thinking	Systems Thinking
Ethical & Values-Based Decision Making	Financial Risk Management & Scenario Planning	Strategy Development	Systems Knowledge
Communication	Resource Development & Planning	Program Development	Community Empowerment, Partnership, & Trust Building
Organizational Culture	Asset Management	Evaluation Design & Management	A/advocacy
Governance			

Cross-Cutting

These four cross-cutting competencies represent the professional skills and knowledge executive staff and board members need in order to be successful across all aspects of their work.

Ethical & Value-Based Decision Making

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of identifying, assessing, and acting on ethical issues, duties, and obligations so as to maintain the integrity of the organization and oneself.	• Assesses and mitigates potential gaps between intent and impact both on a personal and organizational level. • Promotes and models collaborative decision making within and outside of the organization • Appraises and advances ethical standards set by the nonprofit/philanthropic sector and by the organization. • Exercises self-awareness of privileges, biases, and cultural preferences and how they manifest within one's own ethical behaviors.	• Establishes ethical standards, values, and policies to shape a culture of accountability within the organization. • Ensures that staff leadership is employing ethical & values-based decision making. • Knows to whom and for what nonprofits are accountable, internally and externally, and how that accountability impacts the organization. • Models, through example and regular discussion values (embodied in philanthropy), such as trust, stewardship, service, voluntarism, civic engagement, shared common good, freedom of association, and social justice.

Communication

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of effectively exchanging information with and between internal and/or external stakeholders.	• Engages across stakeholder groups to generate input from multiple points of view and perspectives. • Respectfully clarifies and organizes complex information in the service of lessening power dynamics. • Identifies potential barriers and implements appropriate and effective communication strategies based on communication type, purpose, audience, and platform.	• Engages in constructive discourse and provides and receives feedback appropriately. • Creates training opportunities for the board to explore various cultural values of communication. • Establishes policies and practices that promote the participation of appropriate voices and stakeholders.

Organizational Culture

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
Influencing and contributing to the underlying beliefs, values, and practices of interacting that shape the internal environment and operations of the organization.	• Regularly conducts an equity assessment to identify disparities at the staff level and address challenges through the creation and adoption of policies and practices. • Assesses organizational processes, structures, and practices to ensure they account for and value lived and experiential expertise. • Contributes to a sense of belonging by assessing and establishing shared group/team norms. • Models and sets expectations to share power across organizational units and teams. • Fosters a pipeline for the identification and growth of emerging talent up to and including leadership positions. • Reflects an understanding and ability to articulate societal obstacles to race equity and how they manifest within organizations. • Seeks and provides feedback in a manner that promotes accountability and transparency.	• Regularly conducts an equity assessment of the board level to identify disparities and address this challenge through the creation and adoption of policies and practices. • Educates itself on historical barriers to board service and executive positions. • Engages in ongoing succession planning to assure continuity, encourage internal promotion and professional development, and align with strategic directions. • Promotes collaborative efforts by using a variety of strategies and creating opportunities to develop trust between staff, board, and stakeholders. • Seeks and provides feedback in a manner that promotes accountability and transparency.

Governance

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The process and function of providing strategic leadership while ensuring accountability.	• Understands and respects the separation of roles among staff, the board, and individual board members. • Appropriately supports board functions through the strategic and inclusive deployment of staff. • Implements strategy that is developed in partnership with the board of directors. • Ensures that internal and external stakeholder perspectives and experiences are represented in strategy discussions and planning. • Develops a constructive working relationship with the board and board chair.	• Understands and respects the separation of roles among staff, the board, and individual board members. • Continually reviews, assesses, and adapts the organization's structure, bylaws, and committees to ensure effective planning for organizational sustainability. • Drives, monitors, and aligns strategy with organizational mission and values. • Assures the organization is in legal and ethical compliance. • Implements a regularly scheduled assessment of the executive director/lead staff member that is aligned and informed by the organization's strategy, mission, vision, and values. • Engages in continuous learning within the board, assessing and challenging board practices and embedding lessons learned.

Financial Management

Directing and overseeing the financial operations and obligations of the organization in a strategic manner.

Financial Risk Management & Scenario Planning

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
Ongoing analysis of current and potentially disruptive events and the development of solutions that keep equity centered in the analysis.	• Creates financial and other scenarios to analyze in partnership with the board and for the purposes of balancing and responding to events including those that have not yet occurred. • Demonstrates an understanding of liability risk. • Evaluates and routinely includes impact and potential impact of scenarios on operations, programs, internal and external stakeholders, and the future fulfillment of the vision of the organization.	• Analyzes financial and other scenarios and makes decisions that control for risk and are equitable, proactive, and aligned with mission. • Analyzes financial position and draws connections to resource development and mission impact. • Interprets and fulfills compliance standards, particularly from donors, IRS, and state.

Resource Development & Planning

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The design and development of strategic resource development plans that utilize and balance a variety of revenue sources.	• Applies knowledge of the philanthropic landscape to inform the development of options for creating a diverse portfolio of revenue streams. • Ensures revenue strategies are accessible to a diverse audience of stakeholders by addressing and challenging race and wealth disparities. • Advocates for the community by helping supporters understand the community context & impact of their support in advancing equity.	• Challenges preconceived notions around external cultures of philanthropy (naming rights, which communities donate, etc.). • Establishes the role of the board of directors in fund development. • Promotes a culture of philanthropy within the organization.

Asset Management

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
Understands and evaluates the appropriate role and degree of utilization of various revenue sources to propose a strategic and sustainable resource development plan.	• Assesses and manages contributed andearned revenue, financial trends, and investment strategies. • Creates processes for handling andoverseeing cash and assets. • Oversees cash and asset management. • Prepares financial reports, monitors budgets, and ensures they are accessible. • Allocates financial resources in amanner that reflects organizational values.	• Analyzes financial position and draws connections to mission impact. • Understands financial reports and articulates the story they tell to support mission fulfillment. • Leverages asset portfolio (space, savings,investments) to support mission fulfillment. • In partnership with staff, creates, approves, and continuously monitors and adapts annual budget.

Strategic Thinking

The ability to identify, gather, interpret, and learn from relevant data from a variety of sources to design organizational and programmatic strategies that are aligned with organization's mission, vision, and values — OR — the iterative practice of combining organizational awareness and trend analysis to design organizational and programmatic strategies that are aligned with organization's mission, vision, and values.

Strategy Development

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of developing organizational and programmatic strategies.	• Partners with the board and stakeholders to research, test, develop, and create strategic options. • Organizes and appropriately allocates resources in support of the strategy. • Articulates the impact of strategy on internal and external stakeholders. • Leads in the implementation of the strategy.	• Actively seeks, considers, and applies input from stakeholders when developing strategy. • Leads strategic planning focused on mission fulfillment. • Partners with and supports the executive staff to ensure strategic goals are shared and understood. • Oversees and evaluates progress of strategy implementation. • Applies knowledge of the sector and appropriate sub-sectors to inform strategy.

Program Implementation

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of developing, implementing, and refining programs which are informed by community needs and voices and fulfill strategic priorities.	• Prioritizes the end user experience when identifying new markets, programs, and services. • Executes action plans to ensure that essential program elements are implemented. • Incorporates a wide range of stakeholder feedback and recommendation mechanisms.	• Assesses the impact of program's role and how it supports mission fulfillment. • Monitors indicators for program effectiveness to inform decision making. • Assesses and recognizes the strategic return on investment (ROI) of each program.

Evaluation Design & Management

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of creating and managing evaluations that are aligned with the organization's goals and outcomes and appraise program effectiveness.	• Able to understand and apply a range of evaluation methods and processes relative to the stated outcomes and goals of a strategy and related programs. • Ensures methodology and results are accessible to the intended audience. • Employs various data collection strategies that center and promote participant ownership. • Implements analysis techniques to track outputs and report on outcomes. • Interprets and applies evaluation results to assess progress, identify trends, and share lessons.	• Connects evaluation results to decision making. • Analyzes the evaluation process and understands the impact on stakeholders. • Sets and regularly monitors strategic goals and revises strategy as lessons are learned.

Systems Thinking

The ability to understand separate parts of a system, how those parts are interconnected, and their potential influence.

Systems Knowledge

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
Understanding existing public, private, and cultural systems and how they intersect with and impact individuals, groups, communities, and other systems through their history, role, approach, purpose, and design.	• Understands the historical and current content of racial inequity and can discern the impact of stakeholders. • Understands, implements, and iterates strategies for sharing power and addressing systems of privilege within the organization's community role. • Educates stakeholders on making connections between systems and their relationship to equity. • Identifies, understands, and interprets data from a variety of systems to understand impact. • Advocates for equity within the sector based on current and emerging trends and in alignment with their own organization's mission.	• Is aware of how systems impact individuals, groups and communities in general and specific to their organization's mission. • Connects contemporary topics, trends, and debates in the philanthropic sector to the organization's mission, vision, strategy, and culture. • Challenges the status-quo operation standards in the sector as it relates to equity. • Develop, implement, and evaluate recruitment, cultivation, and retention practices that prepare the board to support and participate in systems change.

Community Empowerment, Partnership, & Trust Building

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The practice of connecting, authentically engaging, building and maintaining trust.	• Listens to various perspectives, and actively assesses and shapes the practices related to how the organization engages with stakeholders. • Creates equal partnerships with community members in order to identify needs and design mutually agreed upon solutions. • Advocates for and with communities experiencing injustice and oppression. • Recognizes the capacity and unique experiences and culture of community partners.	• Initiates and navigates necessary conversations around equity, internally as a board and externally with stakeholders. • Reflects on and encourages environments that generate a sense of belonging among and between stakeholders. • Promotes the organization and invites engagement by stakeholders.

A/advocacy

DEFINITION	EXECUTIVE STAFF BEHAVIORS	BOARD BEHAVIORS
The ability to drive, manage, and participate in activities with stakeholder groups to influence and achieve equity through social change.	• Creates a shared vision, understanding of challenges, and solutions with other nonprofits or cross sector organizations. • Collects and shares knowledge about system roles and functions, identifies intersections among systems, in the service of developing a plan of action. • Recognizes and works to balance power between partners in a manner that mitigates the impact of systemic inequities. • Exercises timely information sharing, problem discussion, and resolution while actively deconstructing dominant cultures represented within the collaborative effort. • Applies knowledge of the sector to inform the development of options for generating broader impact within advocacy campaigns.	• Understands and can articulate the role of public policy as it relates to the organization's mission and the lives of stakeholders. • Considers social change and systems' advocacy in the setting of strategy. • Complies with/maximizes what is allowable under IRS rules.

Referenced Frameworks

Reviewed:

- BoardSource
- Ecosystem
- Johnson Center Program Officer Model
- Michigan Community Resources
- NACC
- Nonprofit Leadership Alliance
- ProInspire
- The Talent Development Platform
- United Way of the Midlands
- TRIEC - Toronto Region Immigrant Employment Council

Currently Sourced:

- BoardSource
- Johnson Center Program Officer Model
- Michigan Community Resources
- NACC
- ProInspire
- The Talent Development Platform
- TRIEC - Toronto Region Immigrant Employment Council

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