How social performance indicators and leadership contribute to the development of non-profits – an approach to long-term care homes

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Abstract: Presently, non-profit organisations (NPOs) are increasingly representative in society and largely contribute to the economic and social development of countries. This development is linked to the creation of social value through their proximity to citizens, flexibility, and sensitive format, since most NPOs are service providers. Our paper focuses on long-term care (LTC) homes, a very particular type of NPO, and aims to understand how social performance indicators and leadership contribute to the development of such organisations. For that purpose, we will identify the most important social performance indicators and the main leadership characteristics. Our results provide a better understanding of the non-profit sector, and we intend to raise awareness to the importance of NPO boards' characteristics and leadership traits, emphasising the need for a more professionalised NPO management style.

Keywords: non-profits organisations; NPOs; social performance indicators; leadership; long-term care homes; LTC.

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1 Introduction

The global economic downturn, combined with all the recent challenges faced by social protection mechanisms, has given rise to a new social issue in which the main challenge is to simultaneously create models of socially integration and sustainable development (Chad, 2014; Costa et al., 2011). In this context, more and more non-profit organisation (NPOs) have emerged in recent years and their impact on social development is becoming increasingly evident, since the way they are economically organised and develop their services and activities appears in response to a wide variety of situations (Monzón-Campos and Chaves-Ávila, 2012). For this reason, the ability to adjust to both adversities and the specific needs of each context make these organisations a robust and undeniable element of social development.

The current economic crisis, intrinsically linked with the recent pandemic context of a new coronavirus (Barcaccia et al., 2020), has exposed some fragilities in our systems, namely in social protection, stressing the need for more sustainable development models (Broman and Robèrt, 2017; Freitas et al., 2012). In this context, more NPOs have emerged and their impact on social development is increasingly notorious, since the way they are economically organised and develop their services and activities emerges in response to a wide range of circumstances. So, the ability to adjust to adversities and the specific needs of the context make these organisations a robust and undeniable social development factor. However, this sector is plagued by great asymmetries, and therefore it seems adequate to divide the sector and separately analyse different typologies (Salido-Andres et al., 2020; Shier and Handy, 2015). At the same time, the board of directors is vital to the stability of the organisation and the future of its mission (Stewart and Twumasi, 2020). In our research, we will study LTC homes, used by people who do not need to be treated in a hospital, but cannot be cared at home.

2 Theoretical context

2.1 Leadership

NPOs have particular characteristics, so their leaders must first think and work on the mission of these institutions (Catano et al., 2001) and pay attention to three factors that enhance development: opportunities, skills and involvement (Drucker, 1990, 1999). It is also important to mention that the core of leadership in organisations is, on the one side, influencing and facilitating individual and collective efforts to achieve joint objectives (Yukl, 2012), and, on the other side, the vital ability to integrate and adapt to change and/or specific contexts and guidelines (Shier and Handy, 2016).

The ability to influence groups of individuals based on characteristics that have been developed and learned contradicts the innate character that some previous theories advocated. Thus, leading becomes a demanding process of learning and development, which can become a taxing physical and psychological experience (Cunha et al., 2006), since the whole dynamics of the process is centred on the individual.

Regarding behaviour, the leader can use two different types of guidance:

1   task-oriented behaviour, such as setting goals, planning and assigning tasks to group members and meeting deadlines

2   people-oriented or interpersonal relationships behaviour (such as concern for the group's climate and development of good interpersonal relationships) (Neves, 2000).

Strategy number one reproduces the extent to which the leader structures and defines the tasks and roles of the group members in order for the group to achieve the objectives set out; strategy number two reflects the degree to which the leader trusts the group members, taking into account their individual differences, while also seeking to develop positive interpersonal relationships.

We can mention two distinct types of leadership:

1   transactional leadership

2   transformational leadership (Bass, 2000; Herman and Associates, 2016).

In transactional leadership, the leader advocates dealing out rewards according to the behaviour observed; whereas in transformational leadership, the leader is seen as someone capable of articulating a vision of the future that can be shared with colleagues and subordinates, intellectually encouraging them and paying attention to their individual differences. The transactional leader appeals to the personal interests of his assistants, using techniques such as constructive reward, praise and promises of success if the subordinate is able to comply with the established commitments, with the leader or the organisation.

Recent studies also stress the importance of analysing these two types of leadership on a gender basis (Altındağ and Kösedağı, 2015; Ogbonna and Harris, 2000; Walumbwa et al., 2008). More and more women in industrialised countries are now holding leadership positions in society, which has aroused interest in understanding how their roles are played in contrast to men's. Several researchers have demonstrated the contribution of the transformational leader to increased organisational satisfaction, commitment and effectiveness, in addition to furthering a better understanding of the dynamics of transformational leadership (Altındağ and Kösedağı, 2015).

Leaders and their performance are underpinned by two important concepts:

1   the perception of self-efficacy

2   emotional intelligence (Bandura, 1990; Bass, 2000).

The perception of self-efficacy is related to the individual's assessments of their competencies to achieve certain levels of performance. These self-perceptions are not defined or measured in terms of the driving components underpinning an action, and therefore the perception of self-efficacy describes the individual's ability to mobilise motivation, cognitive resources and actions necessary to achieve specific goals in a given situation (Grano et al., 2008; Krajcsák, 2018; Manganelli et al., 2015; Saksida et al.,

2016). Emotional intelligence, in turn, has often been referred to as involving concepts complementary to the ability to perceive, assimilate, understand and manage emotions. These concepts include not only emotion and intelligence per se, but also motivation, dispositions and other traits unrelated to capabilities and global and personal functioning (Chell, 2008; Peter and Honea, 2012; Riggio, 2010).

2.2   *Social performance indicators*

Both context and adopted operational practices affect NPOs' strategic guidelines (Sawhill and Williamson, 2001). It is important to mention that NPOs are under growing pressure to reveal their impacts in many dimensions – social, economical, environmental, among others, and not all of them should measure their impact in the same way. Some organisations would be better off determining shorter-term outputs or individual outcomes, and others opting for long-term results (Austin and Seitanidi, 2012; Ebrahim and Rangan, 2014).

The board team is responsible for the organisation's final performance and achievements, which may be influenced by a group of variables that impact the organisation's structure and functions (Balduck et al., 2010). One of such variables is NPO size. In our research, NPO size is defined by the number of its users, since larger NPOs feature characteristics – in terms of structure and functioning – that are different from smaller institutions', and are usually more tightly organised and structured. Also, board size is positively associated with the organisation's social performance (Doherty and Hoye, 2011; Preston and Brown, 2004). The volunteer nature of these boards is also deemed as a positive feature, since being volunteer allows the administrative board to maintain some independence and impartiality (Stewart and Twumasi, 2020). Gender and education might also be considered as central aspects, because higher levels of education could foster positive outcomes (Renz, 2001), and having women in the board teams is seen as a positive indicator of social performance (Basuony and Mohamed, 2014).

NPO development and growth are underpinned by a wide range of factors, and environment has a clear influence on NPOs. Many decisions made by the board team, together with various organisational behaviours, can only be understood by probing the connections between a particular organisation and its environment, being that fundraising is an imperative and robust tendency (Belleflamme et al., 2013; Hughes et al., 2014; Rey-Martí et al., 2019; Salido-Andres et al., 2020). Firstly, it is expected that younger organisations are more active and dynamic, since as an organisation ages over time, it may become less active – for instance, in terms of fundraising, although it is important to note that NPOs desire to amplify and enhance the creation of social value, looking to strike a balance between social and financial value (Austin and Seitanidi, 2012; Sonnino and Griggs-Trevarthen, 2013), Secondly, the identification and understanding of NPO relationships with different stakeholders, because relationships and collaboration with other organisations, and the positive effects of these collaborations, can be fundamental to improve NPO performance and yield benefits such as greater innovation, synergies of skills and competences, improvement of coordination, resources sharing (Austin and Seitanidi, 2012; McNichol, 2005; Moshtari, 2016), among others.

Organisations often mutually shape each other, and the application of innovative practices can positively impact performance and boost development (Kim et al., 2012; Laurett and Ferreira, 2018; Martins et al., 2020; Scoppetta and Geyer, 2019). Characteristics related to staff engagement and development of the executive leadership

team are important to foster the expansion of a social innovation-oriented managerial culture (Shier and Handy, 2016). NPOs are generally grounded on the aptitude to maximise the shaped social value expressed both through the NPO mission and its interaction with several stakeholders (Felício et al., 2013; Ferreira et al., 2017). Economic sustainability is a central objective that combines maximisation of social value with investment in innovation and innovative outputs (Brown and Kalegaonkar, 2002; Casais and Santos, 2019; Wells, 2015), partnerships (Barroso-Méndez et al., 2016; Carvalho et al., 2019; MacDonald et al., 2019), and also different forms of support and benefits, sometimes materialised through a diversity of funds (Casais and Santos, 2019; Ferreira et al., 2017; Wells, 2015).

Our paper investigates an important but under-researched area of work inside a very specific NPO context – long-term care (LCT) homes – and how social performance indicators and leadership contribute to the development of an organisation. We accomplished this goal by examining particular aspects. Firstly, there is still some ambiguity associated with the performance of the leader's role, either due to motivational or cognitive factors. Secondly, it is not always understood or completely clear which performance indicators rule the work of a leader. Several conditions that influence and guide behaviours are described in the literature, but further research is needed (Yukl, 2012), particularly regarding NPOs (Townsend et al., 2017). The profile of the ideal leader will certainly depend on their attitudes and behaviours within a specific NPO, but do these factors impact the development of the institution? Does the way the leader plays his role also influence the way an NPO operates? Do individual attributes have a significant weight? We will try to answer these questions throughout this paper.

Our paper focuses on LTC homes, which offers the chance to achieve significant understandings into the way work is tailored in very specific resource-constrained NPOs where little previous research has been conducted, and more specifically:

1 Which are the most important social performance indicators identified by LTC homes?

2 What leadership characteristics do those boards members have?

3 How social performance indicators and leadership contribute to the development of an organisation?

3 Methodology

We will use a qualitative approach, as our objective is to better understand the reality of LTC homes, a very specific type of NPO, considering social performance and leadership and how these factors can enhance the social development of these organisations. A qualitative and descriptive methodology was used through semi-structured interviews. It has a descriptive format as it seeks to describe the reality according to a specific context and allows to describe the reality as it is observed by the players (Qu and Dumay, 2011).

Regarding the procedure of collecting information, collaboration was initially requested via e-mail, with the formalisation of scheduling an interview, and afterwards via telephone. After authorisation, one member per NPO board was interviewed, totalling 14 board members from 14 different LTC homes. The interviews were recorded in audio

format, and the collected information was transcribed and analysed through descriptive analysis, and the software IRAMUTEQ was used.

The information was coded according to two levels after the participants' validation of the transcriptions: coding the units of analysis into categories and comparing the categories with each other in order to group them into themes and search for possible associations. This coding results in a system of mixed categories, integrating a deductive process through the use of literature review and defined research questions, and simultaneously an inductive process through the empirical information collected.

Table 1   Questions and objectives

Questions	Research questions and objectives	Authors
NPO age	Research questions 1 and 3	Carvalho et al. (2017) and Ebrahim and Rangan (2014)
	The age factor might give stability and reputation, potentially allowing an NPO to achieve ambitious projects	
Considering the board team: number of members, number of volunteers and staff, gender composition and education	Research questions 1 and 3	Altındağ and Kösedağı (2015) and Doherty and Hoye (2011)
	Social performance indicators related to the board's structural and functional characteristics	
Number of beneficiaries	Research questions 1 and 3	Townsend et al. (2017)
	NPO size might influence structural and functional characteristics	
Factors that enable NPO development and growth	Research questions 1 and 3	Carvalho et al. (2017), Ebrahim and Rangan (2014) and Preston and Brown (2004)
	Finding out which social performance indicators actually exist in the NPO (board perception) and how they contribute to its development	
NPO differentiating characteristics	Research questions 1 and 3	Winand et al. (2012)
	Identifying innovation and innovative practices. Innovation might have a positive impact on performance	
NPO partnerships	Research questions 1 and 3	Barroso-Méndez et al. (2016) and MacDonald et al. (2019)
	Partnerships might improve NPO performance	
NPO forms of support and benefits	Research questions 1 and 3	Townsend et al. (2017) and Winand et al. (2012)
	Identifying the number of support and benefits, and verifying if they are indicators of social performance	
NPO leaders' characteristics	Research questions 2 and 3	Saksida et al. (2016), Shier and Handy (2016), Stewart and Twumasi (2020) and Walumbwa et al. (2008)
	Identifying leaders' characteristics (board perception)	

Our research questions are:

1   Which are the most important social performance indicators identified by LTC homes?

2   What leadership characteristics do those boards members have?

3   How social performance indicators and leadership contribute to the development of an organisation?

In order to better understand our methodology, in Table 1 we present the questions, the research questions and its objectives, as well as the authors that investigated them.

4   Results and discussion

In our sample of 14 NPOs, nine are less than 20 years old; one of those institutions is centenary and another one exists for more than 60 years; the remaining are between 20 and 40 years old. The question that arises now is whether the older ones are less active in the community. We can mention that the most recent LTC homes have proven to be cohesive structures for the provision of elderly support services and very dynamic in their community. The age factor enables stable conditions for NPOs, namely with regard to structural and functional dynamics, that is, as institutions evolve, it is expected that they will enjoy increasing reputation and funding to expand their projects (Ebrahim and Rangan, 2014). Nonetheless, considering the NPOs from our sample, the age factor does not necessarily make an NPO less active.

Regarding board team characteristics, most of the LTC homes have five persons on their board, all of them are volunteers and predominantly composed by men, and in all the boards there is at least one member with a university degree. Considering the number of beneficiaries, nine of the 14 institutions have more than 20 beneficiaries; five have 20 or less. Three LTC homes have 100+ beneficiaries. On average, the LTC homes from our sample have 48 beneficiaries. This set of variables might affect the organisation's structure and functions and, consequently, its performance (Balduck et al., 2010). Our data confirms the literature results, since board size is positively associated with the organisation's social performance (Doherty and Hoye, 2011; Preston and Brown, 2004). The LTC homes from our sample have a relatively low number of board members, and another positive aspect is that all of them are volunteers, thus maintaining some degree of independence in relation to the administrative board. The level of education can also be considered as a positive aspect, but gender is a negative item, since the existence of women in leadership positions is pointed out as a positive indicator of social performance (Basuony and Mohamed, 2014).

Considering the factors that enable NPO development and growth, some LTC homes mention the importance of not only the financed projects, but also the projects that they apply to and do not get funds, since all of them show the organisation's dynamics, which is in line with what is described in the literature, since NPOs want to maximise and emphasise the creation of social value, seeking to strike a balance between social and financial value (Austin and Seitanidi, 2012; Sonnino and Griggs-Trevarthen, 2013). In this dimension, it can also be shown that NPO size and internal characteristics are strong indicators of social performance and development (Doherty and Hoye, 2011), because it is clear that the NPO-stakeholder interaction plays an integral and active part of NPO activity. This is apparent when we analyse our data, where elderly, employees, community, beneficiary families and parish where identified as very important stakeholders that contribute to NPO value and work mission.

With respect to NPO differentiating characteristics, the quality of services provided was considered by the overwhelming majority of respondents to be the 'innovation' factor, although it cannot be considered innovative per se if there is no feature that differentiates one NPO from others, and some board members said "I think we all do a little bit of the same thing", thereby confirming the inexistence of innovation factors. We can see that in Figure 1, since the most cited words are 'organisations', 'service' and 'senior'. Implementing innovative practices might produce a very positive impact on performance, enhancing development and increasing organisational skills (Kim et al., 2012; Laurett and Ferreira, 2018; Martins et al., 2020; Scoppetta and Geyer, 2019). In our sample of LTC homes, factor innovation seems to be non-significant, and may even harm NPO performance and growth.

Figure 1   NPO differentiating characteristics

About NPO partnerships, we obtained a variety of answers: nine out of the 14 NPOs have established partnerships; five have no partnerships. Nine LTC homes mention education, health, sport and public partnerships (with the municipality and social security). The most important partner mentioned is the municipality, which underlines the importance of proximity (McNichol, 2005). LTC homes with established partnerships have generally more than one, which emphasises the importance of context and collaboration, since these partnerships significantly improve NPO performance (Moshtari, 2016), and produce positive impacts through the creation of networks with similar-oriented organisations (Austin and Seitanidi, 2012). All the LTC homes in our sample perceive and admit that working together with other entities can be very advantageous, because combining synergies and competences might improve service provision, although some mention the need to adjust NPO strategy to expand the scope and time frame of partnership benefits.

In regard to NPO forms of support and benefits, seven LTC homes mention that they receive cash support; five receive support other than money (usually clothes, food and several materials, like computer equipment). The most important donors belong to the community where the LTC home is located; most donors are individuals, but occasionally there are also companies; five LTC homes report not receiving any kind of support or benefit from their communities or other entities. This question aimed to validate whether supports and benefits constitute an indicator of social performance, as

fundraising is crucially important for some projects (Belleflamme et al., 2013; Hughes et al., 2014; Rey-Martí et al., 2019; Salido-Andres et al., 2020).

About NPO leadership characteristics, this question was identified as the most difficult to answer. There were some lingering hesitations, doubts and silences, and several interviewees tried to answer in a negative way – 'a leader must not'. Although a leadership profile was identified, these hesitations stemmed from what the interviewees considered to be the practices, i.e., they were able to identify important leadership characteristics, but were not sure if themselves truly embodied these characteristics and if they applied the practices in their working daily lives. It is worth mentioning that an organisation's effectiveness depends mainly on the leaders, since they are the ones eligible to carry out strategic planning, resource development, financial management and conflict resolution (Álvarez González and Sanzo Pérez, 2009; Balduck et al., 2010; Carvalho et al., 2017). Hence, leading means dealing with change and having the ability to adapt to new challenges and circumstances (Catano et al., 2001).

Some leadership characteristics that influence performance are self-awareness, self-regulation, motivation, empathy and social skills (Renz, 2001; Townsend et al., 2017). The literature also identifies 14 categories of leadership behaviour to influence others and achieve maximum performance: planning and organisation; problem solving; clarification; information/motivation; monitoring; consultancy; recognition; support; conflict management and team building; networking; delegation; skills development; and reward (Yukl, 2012). The majority of our interviewees mentioned that a good leader boasts universal characteristics: ability to motivate others; satisfaction with their job; understanding the team; capacity to solve problems; be committed and present. These features underline some aspects that are mentioned in the literature, such as the ability to involve the other in shared goals; the ability to seduce; integrity; and ability to adapt to change (Shier and Handy, 2016). These are the most important indicators regarding leadership within an NPO. Other characteristics where also mentioned, such as being a good listener, a good mediator and a good financial manager. The respondents were unanimous regarding the characteristic 'assertiveness', i.e., self-confidence and consistency in expressing opinions, which validates some arguments presented in the literature, which mention assertiveness, dominance, level of activity and energy, fluency in speech, sociability, emotional stability, and awareness as fundamental leadership characteristics (MacKenzie et al., 2014; Souder, 2016). As an emotional competence, assertiveness determines if an individual can assume a clear, correct and responsible position, showing confidence and commitment to goals. All respondents considered these to be the ideal characteristics, but they also stressed that it is not always easy to put them into practice. They were aware and informed of what a good leader should be and do, but it was not clear whether they themselves truly embodied these characteristics and applied them.

One aspect that did not arise in our interviews, despite being mentioned in the literature, is the concept of emotional intelligence, pointed out by several authors who study the phenomenon of leadership as a strong indicator of a good leader (Altındağ and Kösedağı, 2015; Warner et al., 2011; Winand et al., 2012), since the ability to motivate, understand and manage emotions is facilitated by leaders with high emotional intelligence.

Next, we present Table 2 with all the questions, as well as the objectives, the answers obtained and the main conclusions, in a briefer format.

Table 2 Results

Questions	Objectives	Answers	Conclusions
NPO age	The age factor might give stability and reputation, potentially allowing NPOs to achieve ambitious projects	Very different ages	The age factor gives stability and reputation, therefore it does not make an NPO less active
Considering the board team: number of members, number of volunteers and staff, gender composition and level of education	Social performance indicators related to the board's structural and functional characteristics	The answers to this question confirm the literature: adequate number of elements (5); volunteer status; gender: mostly men; mostly high school education	Strong performance indicators related to the board's structural and functional characteristics, which are important for NPO performance. Gender is a negative aspect
Number of beneficiaries	NPO size might influence structural and functional characteristics	Average of 48 beneficiaries	NPO size influences structural and functional characteristics
Factors enabling NPO development and growth	Finding out which social performance indicators actually exist in the NPO (board perception) and how they contribute to its development	The most important indicators are institution activity, the economic factor, community and family, the quality of services and human resources	LTC homes boast strong indicators of social performance and development regarding the number of elements described that contribute to the creation of social value and development
NPO differentiating characteristics	Identifying innovation and innovative practices. Innovation might positively impact performance	"… I think we all do a little bit of the same." The overwhelming majority considered quality of services provided as the 'innovation' factor	Implementing innovative practices enhances performance and development. NPOs do not present significant innovation indicators
NPO partnerships	Partnerships might improve NPO performance	Social security is the most important partnership. Several partnerships established in the areas of health and sport with the municipality	Partnerships significantly improve the performance of organisations and facilitate objective achievement, especially regarding coordination of resources. NPOs perceive that working together is advantageous. The strategy still needs to be fine-tuned to expand the scope and time frame of partnership benefits
NPO forms of support and benefits	Identifying the number of supports and benefits, and verifying if they are indicators of social performance	Nine NPOs receive support and benefits: seven institutions receive cash and five non-cash support. The community is the highest donor. Five NPOs do not receive any type of support.	Philanthropy and voluntarism help NPOs to fulfil their mission
NPO leadership characteristics	Identifying leadership characteristics (board perception)	Leaders should be able to motivate others; should enjoy their work; should understand the team; should have the ability to solve problems and be present; should be good listeners, good mediators and good financial managers, as well as being assertive	Leading means dealing with change and be able to adapt to new challenges and circumstances. It is important to develop certain personality traits to meet these competencies. This question was identified as the most difficult to answer. In spite of some lingering hesitations, doubts and silences, it can be concluded that the leaders of the institutions under study know which are the ideal characteristics of a leader

5   Conclusions

According to the United Nations, population aging is about to become one of the most significant social transformations of the 21st century, with implications across all sectors of society: in the labour and financial markets; in the search for goods and services such as housing, transport and social protection; and in family structures and intergenerational ties. It is estimated that the number of elderly people aged 60 and over will double by 2050 and more than triple by 2100. Senior people are increasingly seen as contributors to development, whose skills must be intertwined with cross-cutting policies and programs. However, in the coming decades, many countries will face fiscal and political pressures in the sphere of public health systems, welfare and social protection regarding the most advanced age group.

In this scenario, LTC homes play an important role, particularly when seniors require help in full-time mode, because this type of senior nursing homes provides the majority or the whole range of the LTC services they need, which typically include nursing care, 24-hour supervision, meals, and assistance with everyday activities; rehabilitation services might also be available. So, having in mind the relevance and the specificities of this kind of NPO, our paper emphasises the importance of understanding how social performance indicators and leadership contribute to the development of an organisation, based on three main questions:

1   Which are the most important social performance indicators identified by LTC homes?

2   What leadership characteristics do those boards members have?

3   How social performance indicators and leadership contribute to the development of an organisation?

Considering NPO age, board team and number of beneficiaries, all the results are very positive. The LTC homes from our sample present management plans, either internal and/ or in partnership with other institutions, with several activities that show dynamism and proactiveness, regardless of their institutional age. The board team, according to what is indicated in the literature, presents an adequate number of people, all of them are volunteers, with secondary education, and the only less positive aspect is that the team is mainly composed by men.

With respect to performance indicators, values such as philanthropy and voluntarism are important factors that contribute to the development of institutions, as well as to the quality of the services provided and the efficiency of the human resources team. Therefore, it is critical that these indicators are identified and perceived by the board team. The economic factor is also described as imperative.

Regarding innovation and partnerships, the LTC homes from our sample do not present innovation indicators, but have established some partnerships, mainly with public organisations. They are aware that the combination of efforts and practices is beneficial to all the stakeholders and allows providing higher quality services, thereby requiring less human and financial effort. However, they recognise the need to improve the way they develop their partnerships.

In terms of leadership, the most important characteristics were identified in line with the characteristics identified in the literature, such as responsibility, objectivity, initiative, integrity and ethical management.

In a world of multifaceted and systemic problems of social inequalities, NPOs represent essential and assertive answers. Therefore, an important challenge faced by all the players is to understand the importance of NPOs, identify their main constraints and limitations, and bring about long-term improvements regarding organisational behaviour and social conditions. In future studies, it would be pertinent to investigate other social performance indicators and work closely with institutions to apply and monitor leadership practices. Another possibility is to study other NPO typologies, such as art or sport NPOs.

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