



Namaste مرحبا Bem Vindo Selamat Datang  
Willkommen  
Bienvenidos Bienvenute Croeso أهلا وسهلا  
Benvenuti  
Welkom  
Bienvenue  
Bienvenidos مرحبا Welcome Welkom Bem Vindo  
Selamat Datang أهلا وسهلا أهلا وسهلا مرحبا Croeso Namaste  
Welcome Bienvenue Bem Vindo  
Willkommen Willkommen Selamat Datang Croeso  
добре дошъл Benvenuti Willkommen  
καλώς ήλθατε  
*Tansi ta-we-oh ALOHA*



# Purposeful Organization Growth

Nowshad Ali, CFRE, CPBA, CPVA



# *Where I Live!*



Nowshad Ali

- CFRE, CPBA, CPVA, TriMetrix HD
- President & CEO On Purpose Leadership Inc.
- I have:
  - Chaired AFP Canada Research Committee
  - Served on AFP Int'l Research Council, Plus
- Member of Aloha Chapter, Greater Toronto Chapter, plus



**onpurpose**  
Leadership inc.

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## PURPOSE WITHOUT COMPROMISE OF CORE VALUES

At On Purpose Leadership, we help people, organizations and communities achieve and sustain: organization growth and effectiveness; individual and team excellence; and hire and retain top talent.

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ORGANIZATION GROWTH  
>

How it grows, impacts your



INDIVIDUAL & TEAM  
EXCELLENCE >

The combination adds to your



HIRE & RETAIN TOP  
TALENT >

Discover how you find top talent



# Session Objective

- Strategic (Not Tragic) Growth and Operational Success requires the right mindset, leadership approaches and sustaining performance at the excellence level. This session will expose new learnings in these regards.
- We will explore the insights gained from James Fisher's research and the Stages of Growth Model.
- We will also look at what can drive success and improved performance.



# Paulo Coelho

*“When we least expect it, life sets us a challenge to test our courage and willingness to change; at such a moment, there is no point in pretending that nothing has happened or in saying that we are not yet ready.*

*The challenge will not wait.*

*Life does not look back.”*



# Market Overview - Canada

- A review in 2022 by Bloomberg of 82,667 Canadian charities Indicates:
  - ✓ Increase of charities' assets by 4%
  - ✓ Total revenues from all sources down 3%
  - ✓ Total expenses before gifts to QD up 4%
  - ✓ Many expenses were down (Occupancy – 3%; Vehicle – 9%; office supplies -1%)
  - ✓ Compensation however up 5%



# Market Overview - Canada

➤ 83,991 charities filed T3010

- ✓ \$166 Billion on compensation related expenses
- ✓ \$304 Billion in Revenues (204.8 Billion from Government sources)
- ✓ \$281 Billion in Expenses
- ✓ 8.1% of Canadian GDP
- ✓ 2 million employed by Charitable and non-profit sector
- ✓ 78% have less than \$500K, 90% employ 10 or fewer people; 58% fully volunteer run.





# Market Overview - US

- According to the National Philanthropic trust and Giving Report:
  - ✓ Americans gave \$484.5 Billion in 2021 a 4% increase form 2020
  - ✓ In 2021, the largest source of charitable giving came from individuals, who gave \$326.87 billion, representing 67% of total giving
  - ✓ Giving in 2021 increased in nearly every sector, with double-digit growth in gifts for arts, culture and humanities (27.5%), public-society benefit (23.5%) and environment/animals (11%).<sup>1</sup>
  - ✓ There are more than 1.54 million charitable organizations in the US (15% of worldwide)



# Market Overview - US

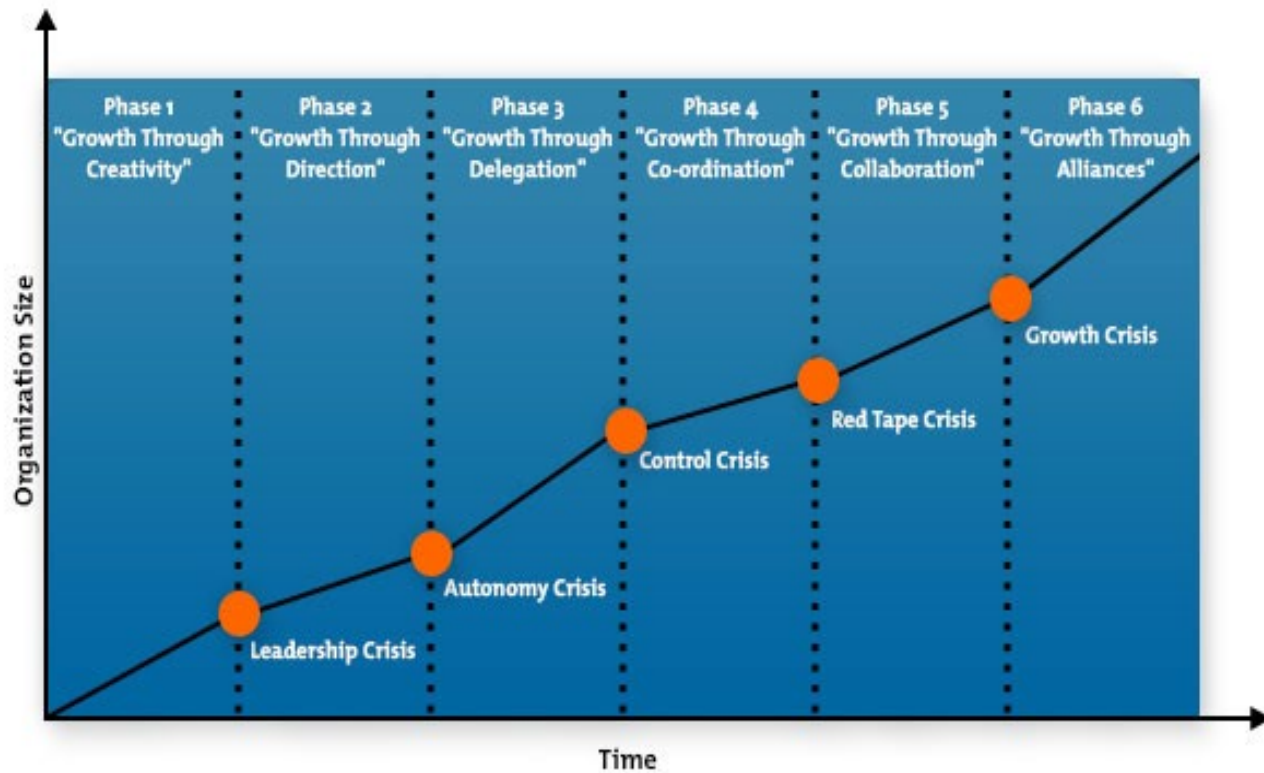
- ✓ Employs 16 million people or 10% of workforce
- ✓ 5.7% of GDP in the US
- ✓ Percent of Americans donating – 2019 – 65%; 2020 – 55%; 2021 – 56%
- ✓ 10% of Revenue comes form Individual donations, while 80 cents of every dollar comes from Government.



# A Couple of Questions

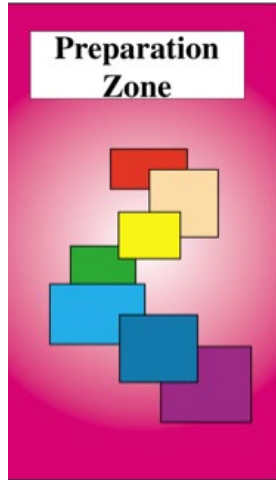
Given the profile presented:

- What do you believe to be the largest challenges to the success of charitable organizations?
- What is your sense of these organizations' capability and capacity to respond to the challenges and opportunities in front of them?
- How would you characterize the outlook for the sector given the market overview and your response to the above two questions?





# Three Unavoidable Zones



Planning and Preparation



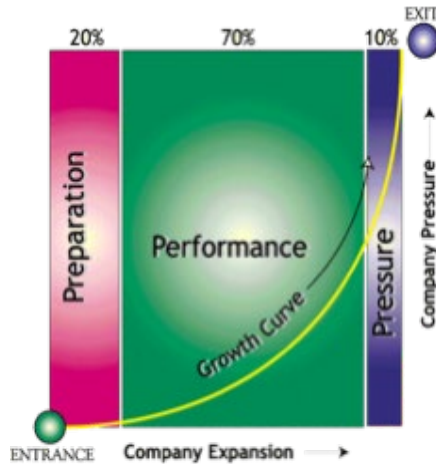
Execute The Plan



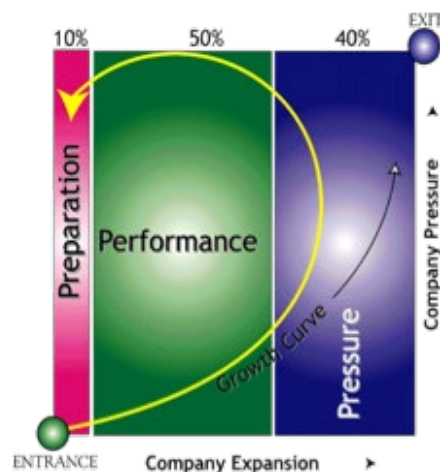
Dodging Bullets Daily  
• Payroll  
• A/R



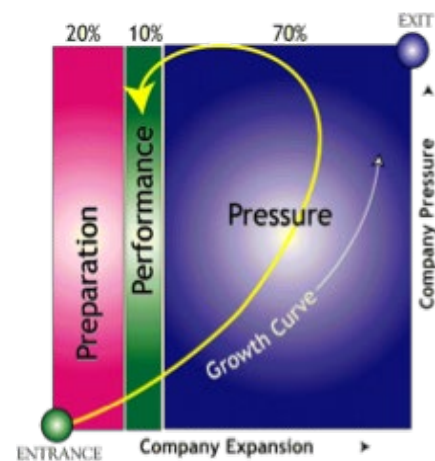
# Company Performance Portrait



**Ideal**  
*Healthy*



**Unhealthy**  
*Increased Pressure  
Due to Little or No  
Preparation*



**Troubled**  
*Dramatic Pressure Due to  
Poor Performance or  
Execution*



# James Fisher – Growth Curve

- The 7 Stages of Growth is an enterprise growth model designed to help organizations and their leadership Diagnose, Predict, and Solve the challenges associated with growing companies.
- 6 years and 650 CEOs
- 35 Industries
- Small and mid-sized companies



# Hidden Agents

- Three Faces of a Leader

Modalities

27 Challenges/27 Strengths

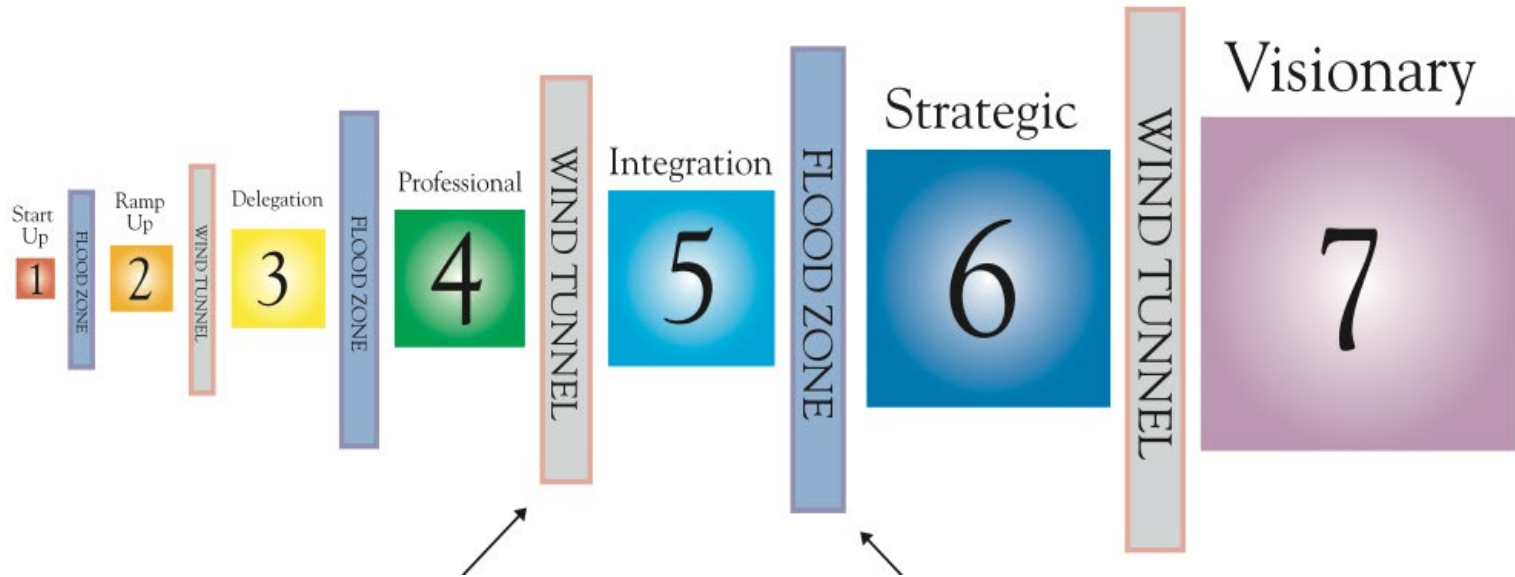
Builder/Protector Ratio

- Non-Negotiable Leadership Rules



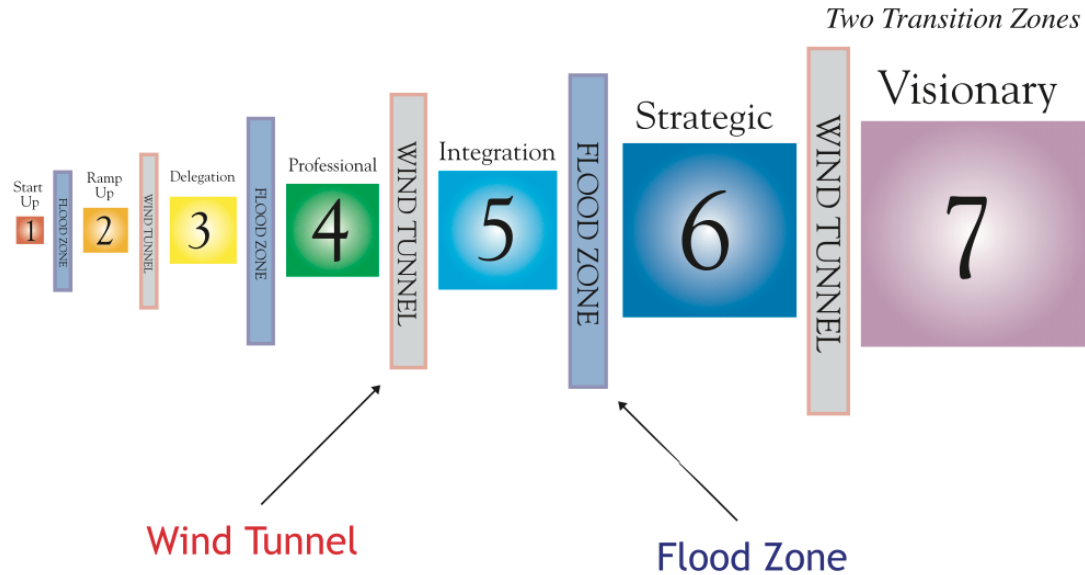


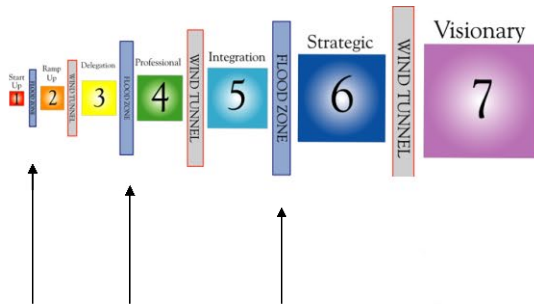
Stage 1 1 - 10	Stage 2 11 -19	Stage 3 20 -34	Stage 4 35 - 57	Stage 5 58 - 95	Stage 6 96 -160	Stage 7 161 -500
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# The 7 Stages of Entrepreneurial Growth

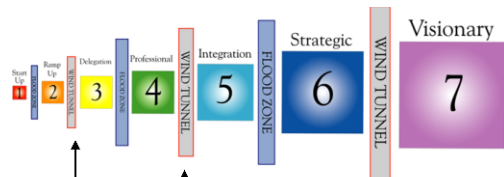




*Transition requires bearing up to an increase in the **QUANTITY** of activity*

Flood Zones occur between stages  
1 and 2, 3 and 4, 5 and 6





*Transition requires letting go of methodologies that no longer work & acquiring methods that do work.*

**Wind Tunnels occur between stages  
2 and 3, 4 and 5, 6 and 7**





# Three Gates of Focus



• Profit



• People



• Process



# Three Gates of Focus

- **Profit/Revenue Gate**
  - Predicting growth by maximizing and anticipating profit and revenue, protection and capacity issues
- **People Gate**
  - Building competency and innovation through the conscious development of people
- **Process Gate**
  - Transforming complexity into clarity through systems



## The Three Gates by Stage of Growth

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6	Stage 7
Profit People Process	Profit Process People	People Profit Process	Process Profit People	Profit People Process	People Profit Process	People Process Profit



# Leadership Profile Facts

- Good moods in leaders lower voluntary turnover.
- For every 1% improvement in employee service climate, there's a 2% improvement in revenue.
- Happy people = Happy profits





# Leadership Profile Facts

- How people feel about working at an organization can account for 20 – 30% of business performance.
- Leaders have more trouble than anyone else when it comes to receiving candid feedback, particularly about how they are doing as leaders.



# Why Competencies are Important

- There are 18 Leadership Competencies utilized in this model; 12 are critical for a leader to understand
- A CEO needs to first understand how competencies affect their ability to run a successful organization
- Then a CEO can start aligning their competencies to help them take their organization to the next stage of growth



1. Self confidence
2. Initiative
3. Achievement
4. Adaptability
5. Transparency
6. Empathy
7. Organizational Awareness
8. Inspirational Leadership
9. Teamwork
10. Developing Others
11. Influence
12. Change Catalyst





# Five Key Competency Areas

(Zenger, Folkman and Edinger, HBR – Oct 2011 – Make Yourself Indispensable)

- Character
- Personal Capability
- Getting Results
- Leading Change
- Interpersonal Skills



Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6	Stage 7
Self Confidence	Emotional Self Awareness	Accurate Self Assessment	Adaptability	Transparency	Initiative	Emotional Awareness
Emotional Self Awareness	Accurate Self Assessment	Achievement	Organizational Awareness	Organizational Awareness	Service	Empathy
Empathy	Initiative	Conflict Management	Service	Influence	Organizational Awareness	Inspirational Leadership
Inspirational Leadership	Empathy	Developing Others	Developing Others	Conflict Management	Conflict Management	Transparency
Developing Other	Developing Others	Teamwork and Collaboration	Teamwork & Collaboration	Teamwork & Collaboration	Teamwork & Collaboration	Change Catalyst



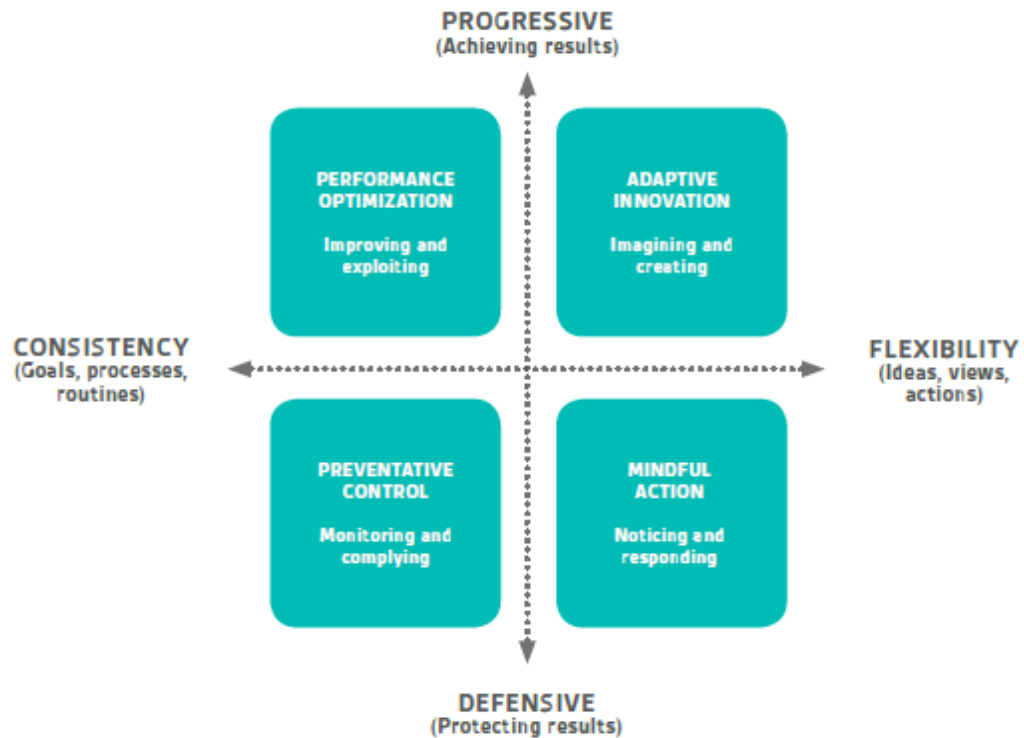
## Three Key Issues Why Organizations Fail

- They don't have a sustainable revenue model
- They aren't able to create a work community that produces a high level of staff satisfaction
- They don't have a model for which they can understand and predict the growth of their organization
- *Bottom Line-* Most organizations are operating in a state of 'figuring it out as they go'.



## Malcolm X

***“There is no better than adversity. Every defeat, every heartbreak, every loss, contains its own seed, its own lesson on how to improve your performance.”***









## PDCA

### Approach

Plan (defining your policy, objectives and targets)

Do (Implement your plans within a structured management framework)

Check (Measure and monitor your actual results against your planned objectives)

Act (Correct and improve your plans to meet and exceed your planned results)

## 4Sight

### Approach

Foresight (Anticipate, predict and prepare your future)

Insight (Interpret and respond to your present conditions)

Oversight (Monitor and review what has happened and assess changes)

Hindsight (Learn the right lessons from your experience)

Act (Respond to and create disruptions and opportunities)



# Reflection

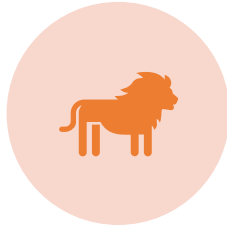
- What are some of your key insights and take aways?
- What Action Commitments are you going away with?
- What Questions remain?



# Samuel Rayburn



***READINESS FOR  
OPPORTUNITY***



***MAKES FOR  
SUCCESS...***



***OPPORTUNITY  
OFTEN COMES BY  
ACCIDENT,***



***READINESS NEVER  
DOES!***



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***Thank You!***



Спасибо Gracias | شكر  
Grazie Ευχαριστώ Dank U  
Obrigado Спасибо Dank U  
Danke  
Dziękuję Ευχαριστώ  
Merci  
Thank You  
Ngyabonga  
Dank U  
Diolch  
Ngyabonga  
Obrigado  
Thank You  
Tack  
Dank U  
Dziękuję  
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