



Not-For-Profit Corporations

Principles of Leadership

Change Management

ROBERT S. BUDD, MPS, CEC

NOT-FOR-PROFIT ISNT CUTTING IT?

- ▶ Although philanthropists and social impact organizations differ in many ways—from their approaches to funding to their levels of transparency and innovation—the sector collectively seems to agree on one thing: The word “nonprofit” isn’t cutting it.
- ▶ “Why should groups describe themselves by what they are not?” Nonprofit professionals, after all, don’t focus their energy on not enriching shareholders, as the word implies.
- ▶ “The word ‘profit’ comes from the Latin noun profectus for ‘progress’ and the verb proficere for ‘to advance.’
- ▶ ‘Nonprofit’ means, etymologically, **nonprogress.**
- ▶ This is not a simple case of mistaken meaning. It’s a dangerous unconscious statement of intent, or lack of it.”



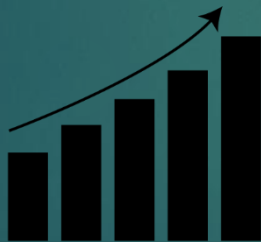
Roles in society

Human Services- Social Change
Agents & Social Solutions



Contributions to individual and
community well-being

Impact on civic engagement



Economic impacts

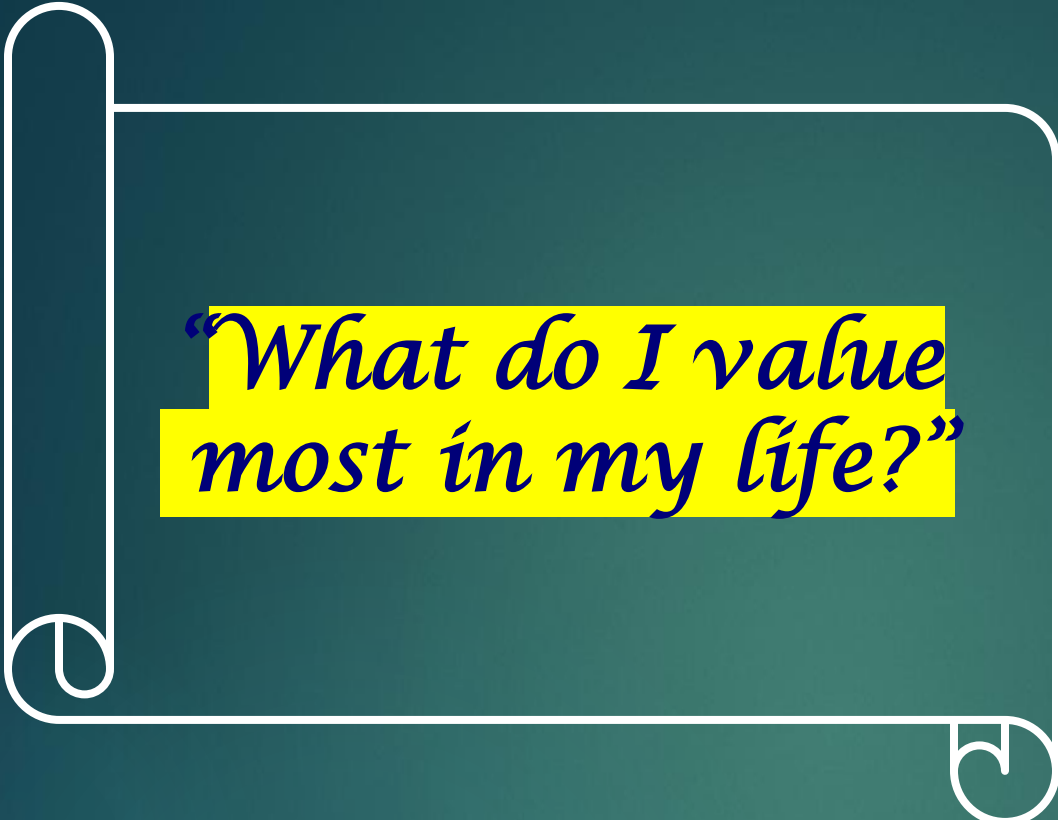


Relationships with government and
business

CHALLENGING OUR ASSUMPTIONS & BELIEF SYSTEMS



- <https://youtu.be/DZYXDcfsoNc?si=3ysRskPEN7qV-I0H>



*“What do I value
most in my life?”*



values.

**Your Unique Gifts!
Your Unique
Contributions!
Vision for the
Future!**

Definition of Leadership?

**The case for
Positive Psychology
and Strengths
Based Leadership**

KEYS TO EFFECTIVE LEADERSHIP

- ▶ Adaptability
- ▶ Assessment of complex problems
- ▶ Unpopular decisions
- ▶ Interdependent philosophy
- ▶ Influence not imitation
- ▶ Helping people to reinvent
- ▶ Leaders don't look for followers ----

LEADERS seek ENGAGEMENT!!!!

HOW DO YOU EXPERIENCE CHANGE?



WHAT HAPPENS WHEN CHANGE IS NOT IMPLEMENTED WELL?



CHANGE AGENTS



- ▶ Circle of Influence
- ▶ Circle of Concern

From Covey 7 Habits



MISSION IS KEY TO SUCCESS

**Mission/Higher Purpose
(High Trust)**

vs.

**Fear/Personal History
(Low Trust)**

How many types of not-for-profits exist?

TYPES	CATEGORIZATION
▶ Social Advocacy Groups	501 (c)-1, 501 (c)-2
▶ Charitable Organizations	501 (c)-3
▶ Foundations	
▶ Civic League, Social Welfare, LEA	501 (c)-4
▶ Context for Human Service Agencies	Local/ State/ Federal/ International Perspectives



4 DISCIPLINES OF EXECUTION

1. Focus on What is Important
2. Create a Compelling Scoreboard
3. Translate Lofty Goals into Specific actions
4. Hold Each Other Accountable

ALL OF THE TIME

**“Vision without
execution is
hallucination”**

Mauritius

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=GU9VCZJ9W-K](https://www.youtube.com/watch?v=GU9VCZJ9W-K)

WE ARE ALL IN THIS TOGETHER.
Individual choices support group
changes!
Creating positive synergies *





STONE

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=U-DISWKADJO](https://www.youtube.com/watch?v=U-DISWKADJO)

Measurement vs. Possibility Thinking

If you embrace possibility thinking, your dreams will go from molehill to mountain size, and because you believe in possibilities, you put yourself in position to achieve them.

John C. Maxwell

quote fancy

A large, ancient tree with a thick trunk and sprawling roots stands at the edge of a split landscape. The left side of the ground is covered in vibrant green grass under a bright blue sky with scattered white clouds. The right side is a parched, cracked, and brown landscape under a hazy, orange-tinted sky. The tree's roots extend across both terrains, with some roots exposed on the cracked earth. The text 'ABUNDANCE VS SCARCITY' is centered over the tree's trunk.

ABUNDANCE VS SCARCITY



Change Agents

- **Circle of Influence**

- **Circle of Concern**



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ACCELERATING CHANGE

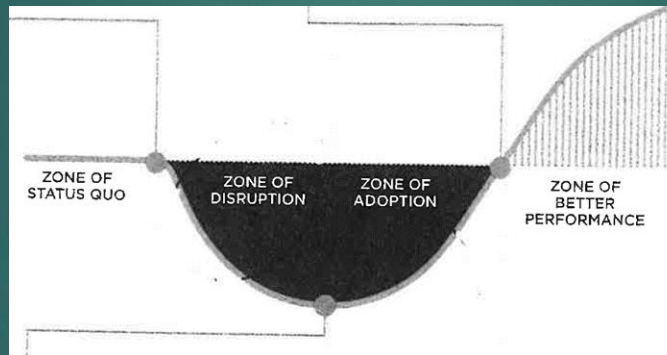
It's only when you reach the Zone of Better Performance that your results are better than before the change. As a leader, your role is to help your team members get to the Zone of Better Performance as quickly as possible. Time and effort expended in the Zone of Disruption and Zone of Adoption add tangible and intangible costs. So make your team's change curve short and shallow to maximize the benefits of change and minimize the costs.

CHANGE IS INTRODUCED

Either by outside forces or an Internal decision.-----

THE ZONE OF BETTER PERFORMANCE

begins when the results are better than the results you saw before the change was introduced.



THE POINT OF DECISION is crossed when you:

- Are aware of what's changing and why.
- Know what it means for you personally.
- Have decided what you will do about it (as opposed to doing nothing).



Becoming A Data-Driven Organization: A 12- Step Roadmap for Executive teams

By Dee DeWitt, Senior Associate, Open Minds

In an increasingly volatile health and human services market, the ability to respond to change with agility and evidence is no longer optional. Market disruptions, shifting payer models, workforce challenges, and consumer expectations require data: reliable, timely, actionable data. Payer contracts are tying reimbursement to measurable outcomes. Consumers are making decisions based on ratings, reviews, and comparative data. Boards are expecting more transparency and accountability. And internally, organizations are being pushed to do more with fewer resources—faster, more efficiently, and with greater impact.

But becoming a data-driven organization isn't just about dashboards or metrics. It's about fostering a culture where leadership decisions are informed by evidence, strategy is translated into measurable outcomes, and teams at every level know how to course-correct based on what the numbers reveal. For many organizations, the path to this level of insight and coordination can feel overwhelming—especially when starting from a place of fragmented systems, inconsistent reporting, or leadership misalignment.



The journey begins with clarity. What exactly are you trying to measure? It is important to establish a clear vision for data, to define what being “data-driven” means for your organization. How do those metrics reflect your strategic goals and market opportunities? How do you ensure consistency in what’s being tracked—and trust in how it’s reported? For most organizations, the answers aren’t simple. Data often lives in silos, different teams have different definitions, and the executive team may not be aligned on priorities. Worse yet, many teams are swimming in data but starving for insight.

The goal isn’t to measure everything. It’s to measure what matters—and to make those insights actionable. The focus is not on having the most sophisticated technology or the longest list of KPIs—but rather on building a sustainable foundation for measurement, accountability, and strategic improvement.

Whether you are just beginning your journey or refining an existing data initiative, the following twelve steps provide a proven structure for turning data into a strategic asset—and using it to lead with clarity, consistency, and confidence. Each step is designed to move your organization toward a state where data is not just collected—but actively used to drive outcomes, support staff, and demonstrate value to every stakeholder you serve.

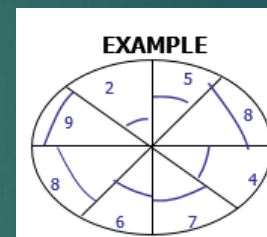
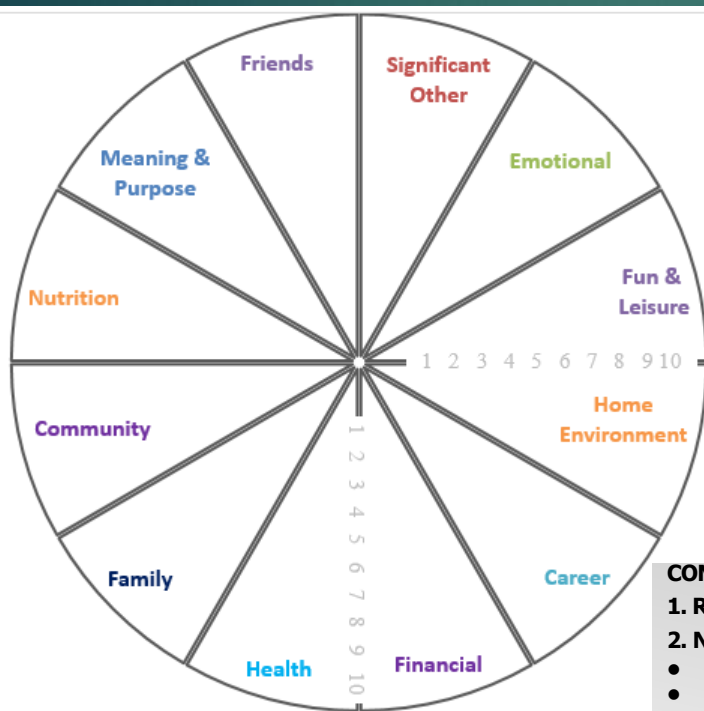
The Foundation: Metrics-Based, Data-Driven Management Practices & Culture

- 1 Market-Driven Strategy & The Metrics Of Success
- 2 C-Suite Technical Assistance – Linking Strategy To Metrics
- 3 The “Wish List” Of Metrics – Prioritized With Feasibility Assessment
- 4 Select The C-Suite Base Metrics Set
- 5 Operationalize The C-Suite Base Metrics Set In An Automated Format
- 6 Practice Data-Driven Decision Making At The C-Suite Level
- 7 Add High-Value Metrics That Require Investment (The ROI Question)
- 8 Extend Data-Driven Organizational Decision Making – With Transparency
- 9 Organization-Wide Education On Using Metrics In Service Delivery
- 10 Add Performance-Based Elements To Team Compensation
- 11 Share Selected Performance Data With External Stakeholders
- 12 Share Real-Time Performance Data With Partners



Wheel of Well-Being

College of Executive Coaching

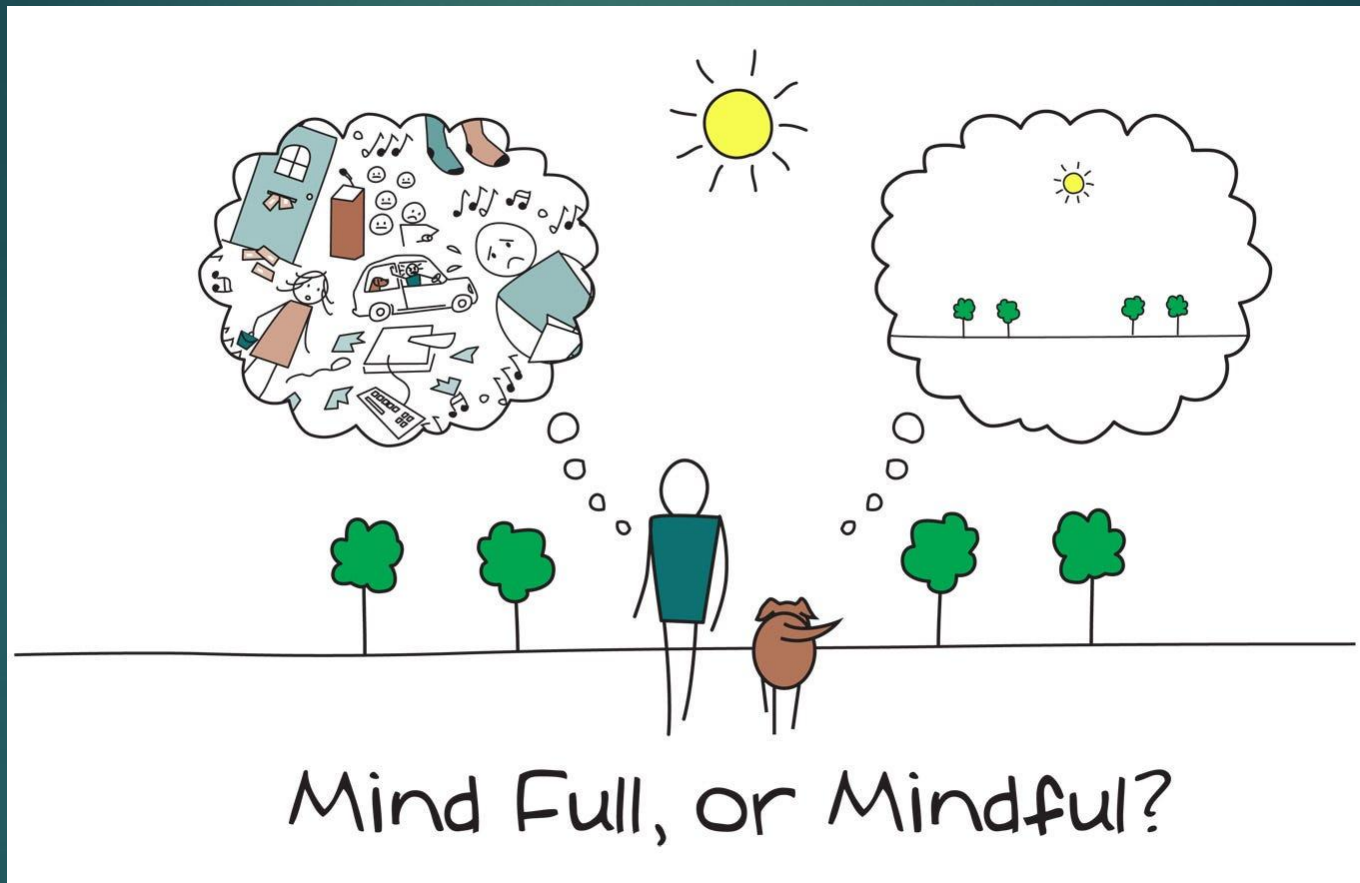


COMPLETE THE WHEEL:

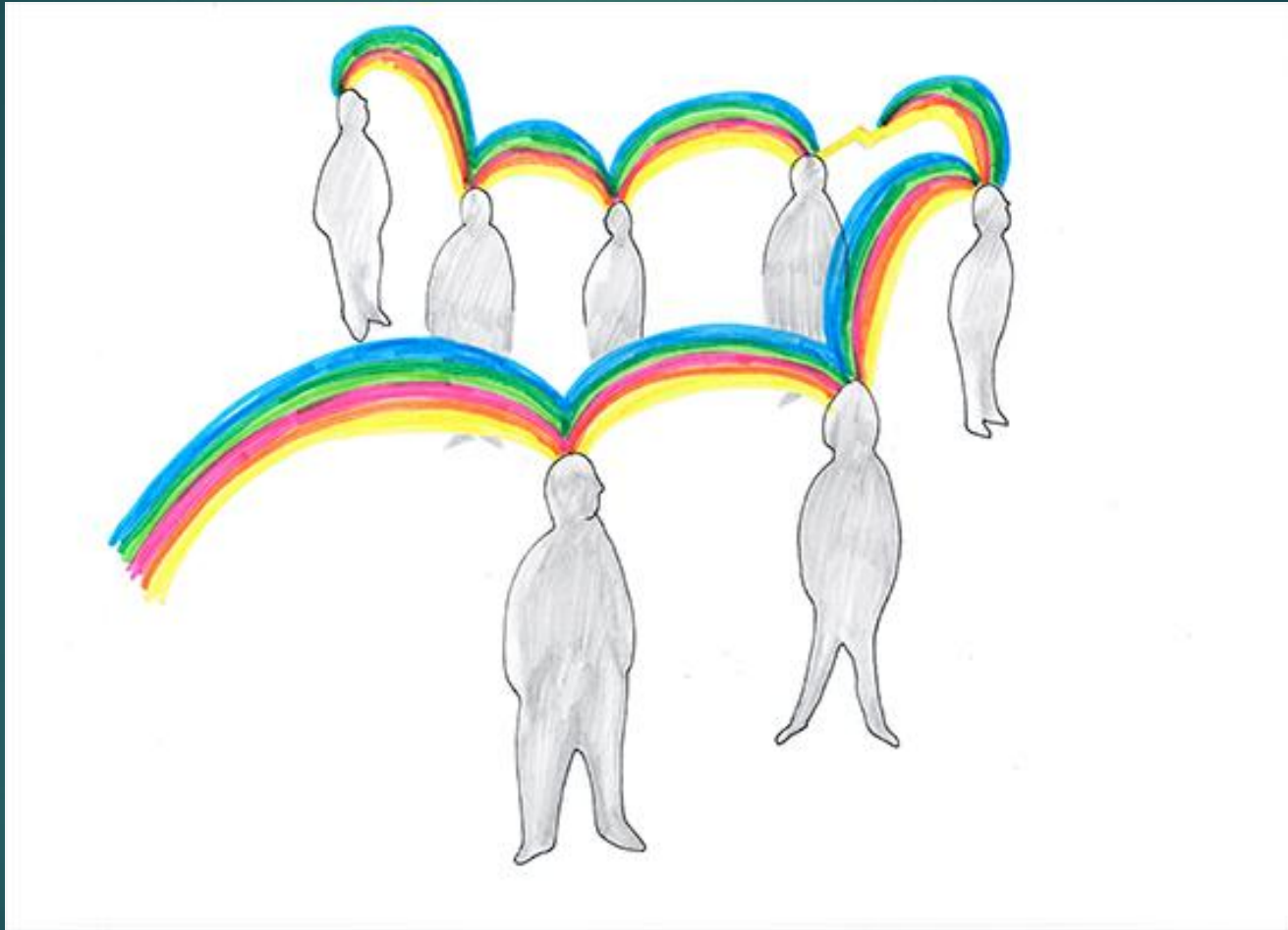
1. Review the 12 Wheel Categories - think briefly what a satisfying life might look like for you in each area.
2. Next, draw a line across each segment that represents your satisfaction score for each area.
 - Imagine the centre of the wheel is 0 and the outer edge is 10
 - Choose a value between 1 (very dissatisfied) and 10 (fully satisfied)
 - Now draw a line and write the score alongside (see example above)

IMPORTANT: Use the FIRST number (score) that pops into your head, not the number you think it *should* be!

1-to-25 ratio: Negativity Bias



Energy is Contagious!





FEAR:

False

Expectations

Appearing

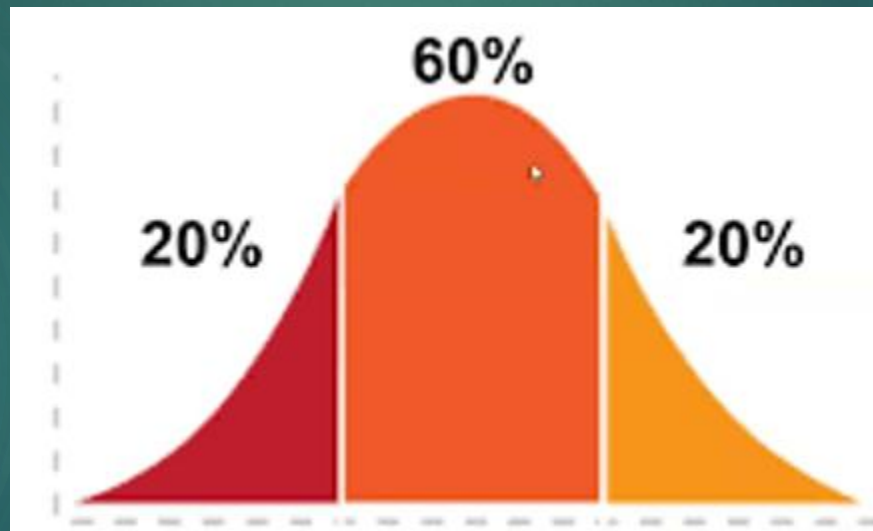
Real

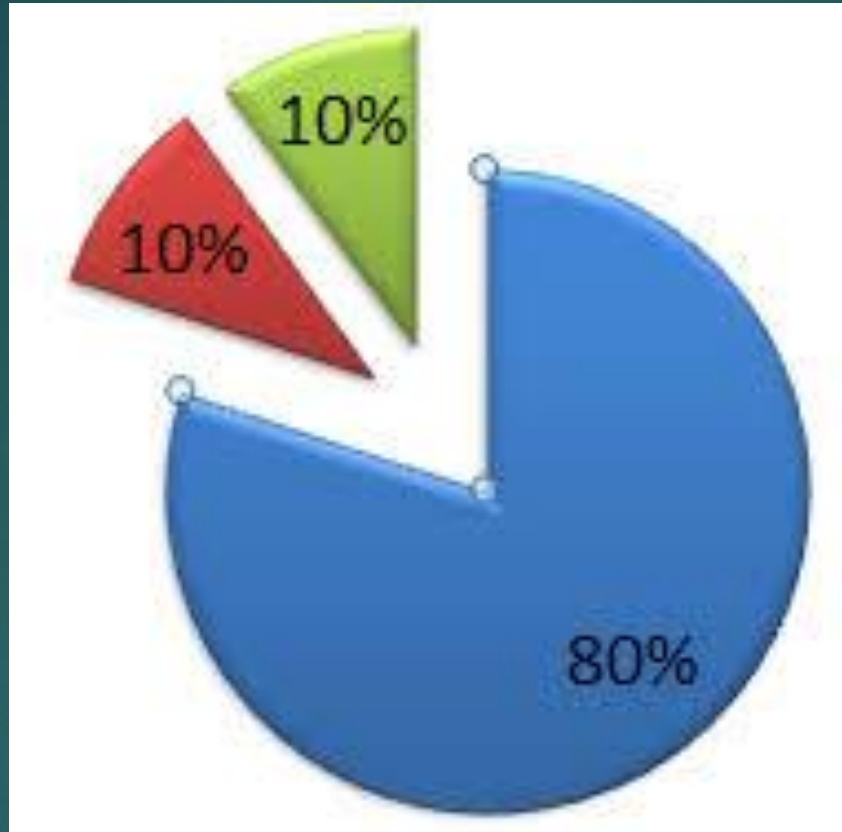


**The Pareto Principle states that,
For many outcomes,
Roughly 80% of consequences
Come from 20% of the causes.**

The 80/ 20 rule

Looking at team change:





CIRCLE OF KNOWLEDGE CONCEPT

COMMITMENT MATRIX

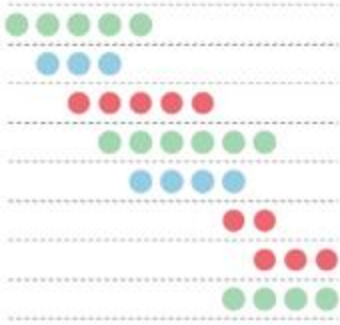
Interactions <i>How would you describe the level of commitment to address issues and make others successful between...</i>	Enforcer <i>None Avoid Beat Isolate Attack</i>	Scorekeeper <i>Minimal Strategize Self-interest/turf Even score Sabotage Blame others Talk to others</i>	Peacemaker <i>Moderate Follow the rules Avoid conflict Avoid Negative feedback Want approval Please others Self-righteous</i>	Rebel Producer <i>Above Average Task Oriented Prove myself Independent Sink or Swim</i>	Generator <i>Strong Give Feedback Chosen Vulnerability Face reality Tell the Truth Make others successful</i>
You and your peers					
You and your team members					
Other key individuals, groups within or outside the organization with whom you interface.					
You and you (self-reflection)					

4 Factors Making Change Ungovernable

Gartner has found that leading through change today is more difficult than ever due to the convergence of four factors, which creates ungovernable change.

Stacked changes

There aren't just more changes, they're stacked on top of each other.



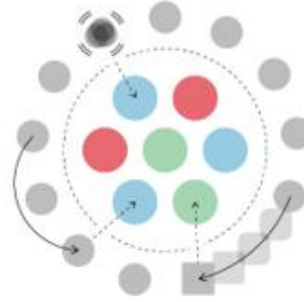
Interdependent changes

Changes aren't only complex, they're interdependent.



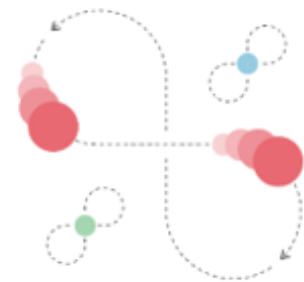
Externally driven changes

Changes are driven largely by external factors, like technology, economic uncertainty, and more.



Continuous changes

Changes aren't only happening faster, they're continuous, with no clear start or end date.



Meeting Principles and Ground Rules



Principles

- Our work together is done best with generative thinking, a process of open inquiry which calls on us to be clear about our deep purpose.
- We match the decision speed to the issue to allow for the right preparation for decision making
- We are committed to making choices in alignment with the goals.

Meeting Principles and Ground Rules - Continued

Ground Rules

1. Be prepared

Members will come to meetings on time having read the agenda and related materials

2. Members will remain present

During a meeting, members will remain focused on the dialogue in process by taking action like silencing devices.

3. Assume positive intent

Members will assume that we are all equally committed to a open collaboration with positive results.

4. Actively engage

Members reflect many points of views, skills and abilities. All of those differences will be a valued as we learn from each other and create opportunities together. We will all contribute our views, ask questions, offer ideas, speak honestly and openly with each other.

5. Remain focused

6. Celebrate and be grateful

7. Conflict of Interest and confidentiality

8. Promote full participation

Power of the Pattern

Power of the Pause

Power of the Purpose

Power of the Passion





Turning intentions into outcomes!

Connecting to higher purpose!

Change Agent Connection!

OPEN DISCUSSION

Reading Resource List

- Uncharitable by Dan Pallotta
- Leaders Eat Last by Simon Sinek
- Strong Ground by Brene Brown
- Dare to Lead by Brene Brown
- Workbook for Dare to Lead by Brene Brown
- The Heart of Business by Hubert Joly
- Strengths Based Leadership
- The 4 Disciplines of Execution by Chris McChesney and Sean Covey
- Immunity to Change by Robert Kegan and Lisa Laskow Lahey
- The 7 Habits of Highly Effective People by Stephen R. Covey
- The Art of Possibility: Transforming Professional and Personal Life by Rosamind Stone Zander and Benjamin Zander
- Workbook for The Art of Possibility: Transforming Professional and Personal Life by Rosamind Stone Zander and Benjamin Zander



MUSICAL INSTRUMENTS VIDEO



<https://www.youtube.com/watch?v=yYbORpgSmjg>



Thank
You!

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