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I am here to help you

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Leading a Charity

It's Your Turn to Make the World a Better Place

What you need to know to be a CEO



CEO Job Description

1. Ensure there is always money in the bank and you account for it accurately and ethically
2. Ensure employees, volunteers and donors are hopeful and engaged
3. Ensure you live up to your mission



Before You Become a CEO...

you need more than fundraising
experience

more than a great interview

more than a plan



You Need a

Theory of Change

How do you plan to expand the
impact of your work?



Expanding the Impact of Your Work (Theory of Change)



Inspired by the Levi Strauss Foundation's Theory of Change

Expanding the Impact of Your Work (Theory of Change)



Those Who Benefit from Your Organization

Expanding the Impact of Your Work (Theory of Change)



Those Who Benefit from Your Organization

Leader



Hope

The future will be better than the present.
I have the power to make it so.

To solve global issues, people need to be hopeful. When people are hopeful, they are more successful in achieving their goals, keeping good health, more positive, and in general, they are happier (Lopez, 2013).

Leader



Inspiration

Leaders influence followers to make self-sacrifices and put the needs of the missions or organization above their materialistic self-interests.

(Yukl, 2013).

Leader

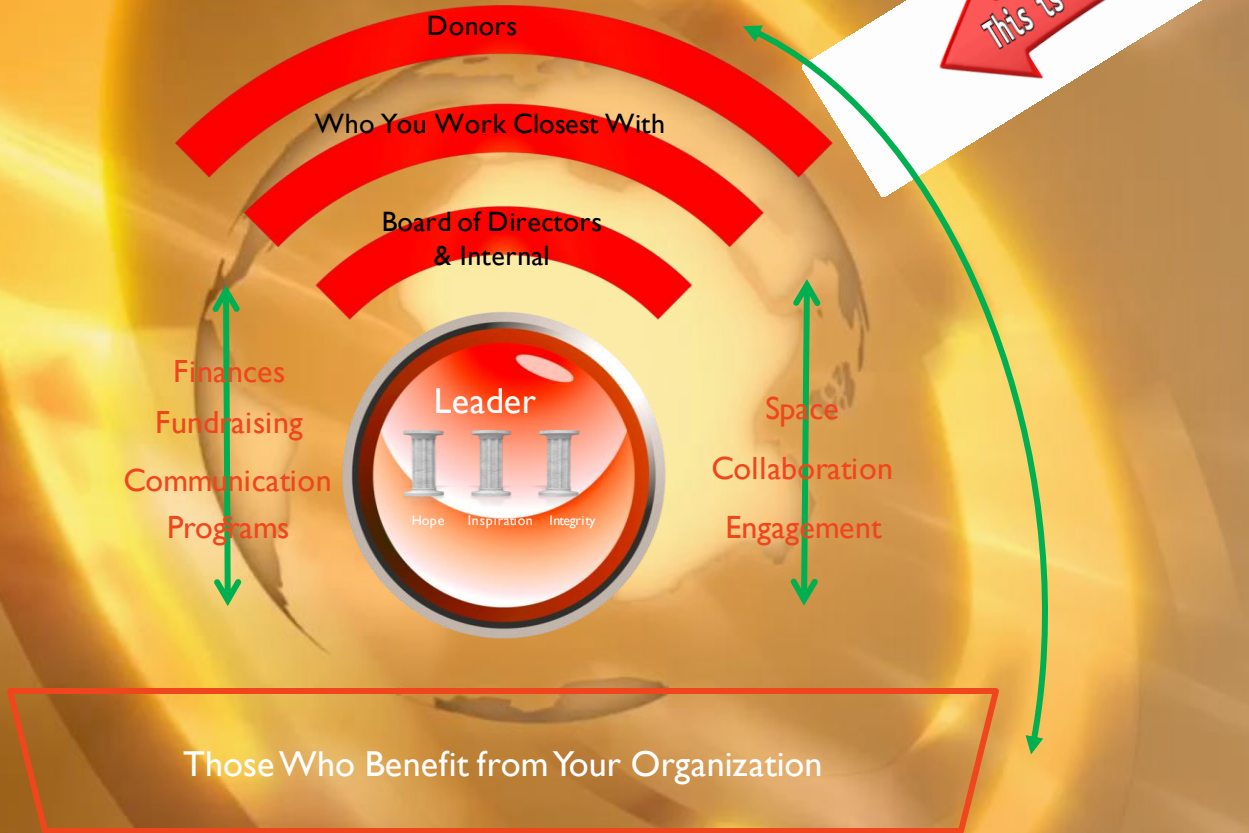


Integrity

Integrity is a primary determinant of interpersonal trust. Unless one is perceived to be trustworthy, it is difficult to retain the loyalty of followers or obtain cooperation and support from peers and superiors.

(Yukl, 2013).

Expanding the Impact of Your Work (Theory of Change)



Job Description Item One

Ensure there is always money in
the bank and
you account for it
accurately and ethically



Financial Statements

The Big 3

Become One with Income Statement

Know the Variances

Clarity



The Canada Revenue Agency

The Big 3

Fundraising Guidance

Tax Receipting

Charity Issues and Latest News



T3010

Six Categories for Expenditures

Charitable

Qualified Donees

Management

Political

Fundraising

Other



Your Finance Team

The Big 3

Accountant or Bookkeeper

Credit Cards and Paying Bills

Finance Committee



Job Description Item Two

Ensure employees, volunteers and donors are hopeful and engaged



Human Resources

The Big 3

Labour Laws

Human Resources Manual

Tough on Issues; Soft on People



Board of Directors

The Big 3

Moments - Stories - Space

Meeting Packages

Committees



Job Description Item Three

Ensure you live up to your mission



Programs and Services

The Big 3

Does it Move the Needle?

Output versus Outcome

Accountability



Sharing Your Story

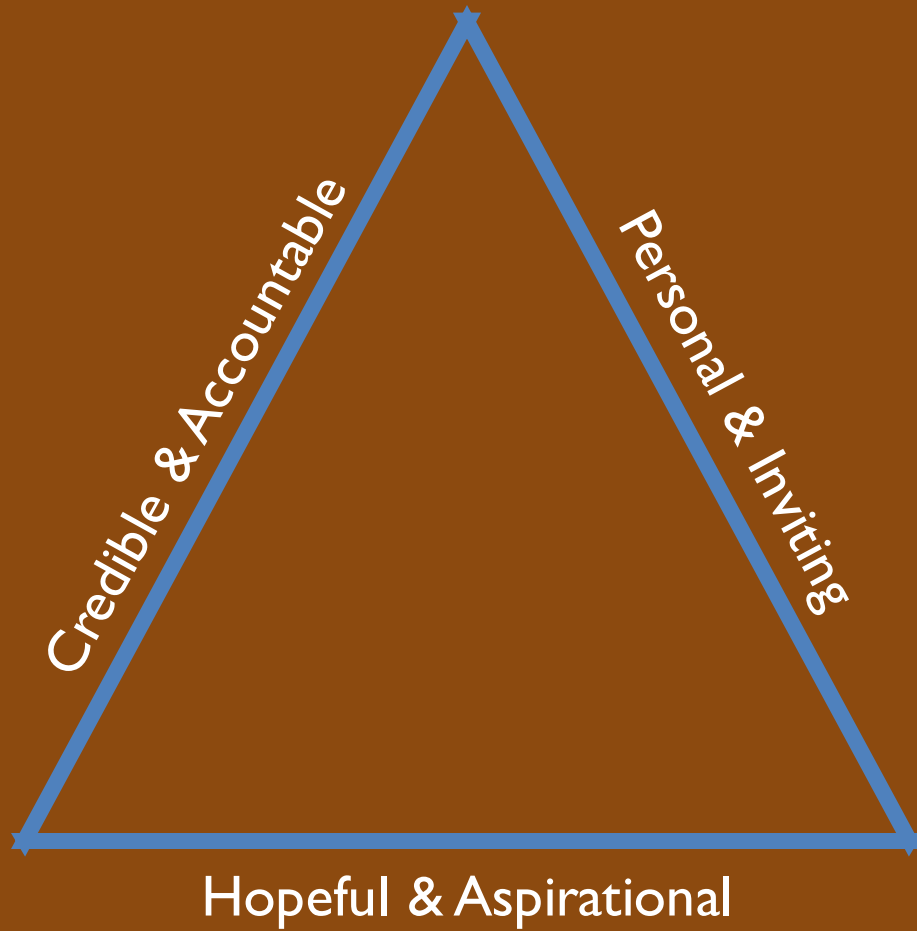
The Big 3

Credible and Accurate

Personal and Inviting

Hopeful and Aspirational





The First 90 Days – 4 Ps

First 30 - **P**eople

Second 30 – **P**olicies and **P**rocesses

Last 30 - **P**erformance



First 30 - **P**eople

The Big 3

Appreciative Approach

Listen to the Final Period

Expectations



Second 30 – Policies Processes

The Big 3

The Minute Book

Human Resources and Cash Control

Contracts and Agreements



Third Month - **P**erformance

The Big 3

25 Most Loyal & 10 Most Generous

Mission Work

Make a Change – get a win



Third Month – **P**erformance
One Bonus Item

Time to Start Changing the Team



The Power of Words



All you need is love



Somewhere over the rainbow



And I think to myself what a
wonderful world



Stayin' Alive ah, ah, ah, ah
Stayin' Alive



And they call it puppy love



We all live in a yellow
submarine



If you liked it you should have
put a ring on it



I heard it through the
grapevine



To dream the impossible
dream



Ain't no mountain high enough



I gotta feeling



Imagine



I am here to help you

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