



Advancing Philanthropy Worldwide

CARTER



Ack! I am the CEO/ED!

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Presented by:

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I Am the CEO/ED!

Agenda

- ▶ Welcome and who we are
- ▶ Who are you?
- ▶ Why this forum?
Support, ideas, sounding board
- ▶ Safe Space!





Key Topics

CEO/ED Success Manual

- ▶ Critical Resources
- ▶ Self Care
- ▶ Crisis Management
- ▶ Peer/Colleagues
- ▶ Learning
- ▶ Adapt
- ▶ Other





10 Basic Responsibilities for Boards

▶ Set Direction

- Determine mission and vision
- Ensure effective planning (i.e., goals/strategic plan)

▶ Ensure Necessary Resources

- Hire capable executive leadership (CEO)
- Manage resources (i.e., Financial oversight)
- Promote positive public image
- Build a competent board

▶ Provide Oversight

- Monitor and Evaluate Programming for Impact
- Legal and moral (ethical) oversight
- Evaluate the Chief Executive
- Assess its own performance





BOARD

Hire & Delegate Daily Operations to CEO/Evaluate

Select Board Members

Ensure Thorough Education of Board Members

Approve Mission & Vision/Strategic Plan

Adopt Organizational Policies

Review/Approve Budget

Assess Org's Achievement of its Goals

Assess Board Performance

CEO/STAFF

Operationalize the Strategic Plan

Hire/Evaluate Staff

Enforce Policy

Manage Fiscal & Program Resources

Develop New Programs

Create the Budget

Provide Board with Information for all Informed Decisions

Liaison Between Board and Staff

Media Relations

SHARED

Fundraise

Schedule Strategic Planning

Generate Organizational Values

Thank Donors

Set Board Meeting Agenda

Advocacy

Board Training

Board Information System

Legal Obligations for Operations



Let's keep the conversation going!

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thank
★ you ★