



Chief Officers 3rd Sector

The CO3 Guide for New to Post

Chief Executives

Kindly supported by:



QUILTER
CHEVIOT

www.co3.org.uk

INTRODUCTION

ABOUT CO3



CO3 is the leading representative body for the leaders of the Community & Voluntary Sector all over Northern Ireland. We work to increase skills, capacity and the visibility of the third sector through a collaborative model that creates space for information training, sharing, development and support.

CO3 has 880 members comprising chief executives, senior managers, chairs, and trustees of community and voluntary organisations. We can connect and convene members and decision makers together to learn and share from one another through a range of forums, events, and networking opportunities.

Established in 1985, CO3 has a long history of supporting, developing and representing the leaders of Northern Ireland's charities, community organisations and social enterprises.

OUR VISION



...what success looks like

'A fair and connected society with a vibrant, valued third sector, led by influential leaders, delivering outstanding impact.'

OUR MISSION



...we will achieve our vision by

'Developing inspirational, innovative and highly skilled third sector leaders.'

OUR VALUES



Courage



**Empowering
Leadership**



Unity



Quality



Social Justice



Integrity

This CO3 Guide for New to Post Chief Executives sets out the key principles of effective third sector leadership in Northern Ireland. It is designed to support newly appointed leaders across community, voluntary and social enterprise organisations, providing a practical overview of core responsibilities, governance, strategy and sector context.

A key aspect of our support for third sector leaders is ensuring access to timely, relevant guidance during the critical early months in post. This guide offers a concise, accessible reference to help leaders navigate their new role with clarity and confidence.

The CO3 Guide for New to Post Chief Executives is supported by Quilter Cheviot.

FOREWORD



Welcome to the CO3 New to Post Chief Executives' Guide supported by Quilter Cheviot.

First, congratulations on your appointment as chief executive and welcome.

As a newly appointed chief executive you will be looking forward to the opportunity to lead your organisation, to set and deliver the strategy, to develop your team and of course to make a real impact in your community.

The role of chief executive is complex and can be demanding and this guide has been developed to serve as a "go to" manual for you in the first few months in the job.

It is an accompaniment to the CO3 New to Post Chief Executives Forum, supported by Quilter Cheviot, which meets quarterly for learning and networking. The forum provides vital connections with others who are also new into the role of CEO, and are experiencing the same types of issues that you are.

We know that running a community organisation, charity or social enterprise can be challenging at times with the ongoing pressures around funding, income generation, demand for services and staff resources. Positioned between the board of Trustees and the staff team, and carrying the responsibility for the organisation the chief executive can sometimes feel a little isolated and lonely.

The CO3 New to Post Chief Executives' Forum and this accompanying guide is designed to provide a support system and knowledge resource which we hope will make your transition to CEO smooth. It will provide the opportunity to build lasting peer connections and give you a safe space to air issues and to get support from other chief executives in the sector.

CO3 empowers leader, drive change and supports you, so lean in and get the best out of all the CO3 has to offer.

With best wishes on your leadership journey.

Valerie McConville
Chief Executive

FOREWORD



At Quilter Cheviot, we are proud of our long-standing commitment to the UK charity sector. Not only do we provide bespoke investment management services to charity clients, we also work closely with trustees and charity personnel to assist them with the discharge of their oversight and fiduciary responsibilities.

Given this commitment, we are delighted to be sponsoring the CO3 New to Post Chief Executives' Guide and Forum, seeing these initiatives as excellent opportunities to extend the support we give to the sector and its leaders.

Leadership roles in all organisations come with a multitude of opportunities and challenges, but this is especially the case in the charity sector. A programme designed specifically with newly appointed CEOs in mind is a valuable and useful resource, particularly one targeting the first 100 days in office. This period is a crucial time for new leaders to set out their charities' future direction and strategy as well as build relationships, both within and outside their organisations. The CO3 New to Post Chief Executives' Guide and Forum are focused on giving these individuals the support they need to settle into their new roles as quickly and smoothly as possible so that the vital work their charities do can continue seamlessly.

Finally, congratulations to all newly appointed CEOs - we wish you all the best in your new roles and we look forward to meeting you at the Forum's upcoming events!

A handwritten signature in dark blue ink, appearing to read 'Ben Murray'.

Ben Murray
Investment Manager
Ben.Murray@quiltercheviot.com

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CHAPTER ONE

INTRODUCTION

Congratulations on your appointment as Chief Executive. This guide is designed to support your transition into leadership by outlining what you need to learn, do, and achieve in your first three months.

Drawing on best practice from CO3, and bringing in learnings from ACEVO, the Charity Commission for Northern Ireland, and the Institute of Directors this guide will step you through the first critical period as a new chief officer.

You have put in the work to get appointed. Your experience, qualifications, values and leadership qualities have got you this far so congratulations!

The first few months in the role are a great opportunity to make an impact for your service users and clients, create alliances and build trust with staff, trustees and stakeholders, and to create the necessary support structures so that you can thrive in your new role.



CHAPTER TWO

UNDERSTANDING THE VOLUNTARY AND COMMUNITY SECTOR IN NORTHERN IRELAND



WHAT TO LEARN

As a new Chief Executive, it's essential to build a strong foundational understanding of the sector you're now leading within. This includes:

➤ SECTOR OVERVIEW

- **SIZE AND SCOPE:** There are over 6,000 registered charities in Northern Ireland, ranging from small community groups to large social enterprises.
- **CORE CHARACTERISTICS:**
 - Mission-driven and values-led.
 - Often filling gaps in public services.
 - Deeply embedded in local communities.

➤ KEY STRUCTURES AND BODIES

- **CO3 (Chief Officers 3rd Sector):** Leadership network for third sector CEOs. Visit co3.org.uk.
- **Charity Commission for Northern Ireland (CCNI):** Regulator for charities. Visit [CCNI](https://ccni.org.uk).
- **NICVA (Northern Ireland Council for Voluntary Action):** Umbrella body offering policy insight, training, and support. Visit nicva.org.

➤ POLICY AND FUNDING LANDSCAPE

- Understand the **Programme for Government, Department for Communities**, and **key funders** like:
 - [National Lottery Community Fund](#)
 - [Community Foundation NI](#)
 - Local councils and trusts

➤ LEGAL AND REGULATORY FRAMEWORK

- Charities Act (NI) 2008
- Annual reporting and registration obligations – CCNI/Companies House

WHAT TO DO

Here's a step-by-step guide to orient yourself in the sector:

STEP 1 MAP YOUR ORGANISATION'S ECOSYSTEM

- Identify your organisation's role in the wider sector.

STEP 2 ATTEND SECTOR EVENTS

- Join CO3 networking events and leadership forums.
- Attend policy briefings and training sessions run by CO3 and other organisations such as Volunteer Now, NICVA and those specific to the area you work in.

STEP 3 ENGAGE WITH KEY STAKEHOLDERS

- Schedule introductory meetings with funders, local MLAs, and peer CEOs.
- Subscribe to newsletters from CO3, NICVA and CCNI to keep up to date.

STEP 4 REVIEW SECTOR REPORTS

- Read [CO3's Valuing Our Sector Report \(2022\)](#).
- Read [NICVA's State of the Sector Report](#).
- Explore [ACEVO's leadership insights and sector trends](#).



TOOLS AND TEMPLATES

- Stakeholder Mapping Template (See Chapter 6)
- Create a Sector Landscape Checklist
- Create an Introductory Meeting Planner

WHAT TO ACHIEVE

By the end of your first 100 days, aim to have:

Outcome	Description
Sector Fluency	Confidently describe the sector's structure, challenges, and opportunities.
Peer Network	Established relationships with at least 5 sector leaders.
Strategic Context	Clear understanding of how your organisation fits into the wider ecosystem.

HOW TO ACCESS RESOURCES

Resource	Description	Link
CO3	Leadership network and events	🌐 Home - CO3
NICVA	Sector research, training, and policy updates	🌐 Representing, supporti...
Charity Commission NI	Legal and compliance guidance	🌐 Home The Charity Co...
ACEVO	Leadership development and sector insights	🌐 ACEVO





CASE EXAMPLE

CASE: COMMUNITY ROOTS NI

When a new CEO joined Community Roots NI, a medium-sized charity focused on rural development, she spent her first month attending policy forums and leadership events of CO3. Through these, she identified a funding opportunity from the Department for Agriculture and built a partnership with two other rural charities. Within 90 days, they submitted a joint funding bid and launched a collaborative pilot project.

CHAPTER SUMMARY

- The voluntary and community sector in Northern Ireland is diverse, mission-driven, and politically aware.
- Understanding the sector's structure, funding, and policy environment is essential for effective leadership.
- Early engagement with infrastructure bodies and peer leaders will accelerate your impact.

CHAPTER THREE

GOVERNANCE AND COMPLIANCE RESPONSIBILITIES

WHAT TO LEARN

As a new Chief Executive, you are a key guardian of your organisation's governance. While the board of trustees holds ultimate responsibility, your role is to ensure that governance is effective, compliant, and aligned with your mission.

➤ Core Governance Principles (from CO3 Guide to Great Governance 2022)

CLARITY OF ROLES

Clear distinction between governance (board) and management (CEO).

ACCOUNTABILITY

Transparent decision-making and reporting.

INTEGRITY

Ethical leadership and compliance with legal duties.

EFFECTIVENESS

Regular board reviews and skills audits.

PARTICIPATION

Inclusive and diverse board engagement.

SUSTAINABILITY

Long-term planning and succession.



➤ LEGAL AND REGULATORY FRAMEWORK

- **Charities Act (NI) 2008:** Defines charitable status and public benefit.
- **Charity Commission NI (CCNI):** Regulates registration, reporting, and compliance.
- **Governing Documents:** Your constitution or articles of association are legally binding.

➤ GOVERNANCE CULTURE

- The CO3 Guide to Great Governance emphasises that governance is a culture, not just a structure. It's about how decisions are made, how power is shared, and how values are upheld.



KEY READING

- [CO3 Guide to Great Governance \(PDF\)](#).
- [NICVA Code of Good Governance](#)
- [CCNI Governing Documents Guide](#)

WHAT TO DO

STEP 1 REVIEW YOUR GOVERNING DOCUMENT

- Understand your organisation's charitable purposes, powers, and decision-making processes.
- Identify any outdated clauses or inconsistencies.
- Consider the board Terms of Office, arrangements for the election and appointment of trustees and succession planning for Chair and honorary officers

STEP 2 MEET WITH THE CHAIR AND BOARD

- Clarify expectations, boundaries, and communication protocols.
- Discuss board development needs.
- Review and update board induction materials and processes

STEP 3 CONDUCT A GOVERNANCE HEALTH CHECK

- Use the Developing Governance Group's Governance Health Check to assess the standards of governance and identify gaps to be addressed.
- Use the CO3 Guide to Great Governance to adopt role descriptions for Chairs and honorary officers and to set down the terms of reference for committees.
- Identify gaps in skills, diversity, or engagement and plan to address these.

STEP 4 ENSURE REGULATORY COMPLIANCE

- Confirm that annual returns and accounts are up to date with CCNI.
- Review your serious incident reporting procedures.

STEP 5 ESTABLISH A GOVERNANCE CALENDAR

- Schedule board meetings, AGMs, and compliance deadlines.
- Include time for board training and strategic discussions.
- Manage a schedule for committee meetings with up to date Terms of Reference for each committee.



TOOLS & TEMPLATES

- Governance Health Check (<https://www.diycommitteeguide.org/governance-health-check/>)
- Board Skills Audit

WHAT TO ACHIEVE



Outcome	Description
Legal Compliance	All reporting obligations met and up to date with CCNI.
Governance Clarity	Clear understanding of board and CEO roles and responsibilities.
Board Development	Identified and addressed governance gaps through training, recruitment and succession planning.

HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3 Guide to Great Governance	Practical guide to board effectiveness	The CO3 Guide to Great Governance
Charity Commission NI	Legal and compliance guidance	Home The Charity ...
NICVA	Governance tools and training	Representing, supp...
CO3	Board development and CEO support	Home - CO3
Developing Governance Group	Governance Review Checklist	Governance Health ...
Developing Governance Group	Board Skills Audit	Management Skills Audit worksheet

CASE EXAMPLE

CASE: GREEN FUTURES NI

When the new CEO of Green Futures NI joined, he discovered that the board had not reviewed its governance practices in over five years. Using the CO3 Guide to Great Governance, he facilitated a board self-assessment, introduced a new trustee induction pack, and worked with the Chair to implement a board development plan. Within three months, the board had improved meeting effectiveness and recruited two new trustees with legal and fundraising expertise.



CHAPTER SUMMARY

- Governance is more than compliance—it's about culture, clarity, and accountability.
- As CEO, you are a key enabler of effective governance and must work in partnership with your board.
- Use the CO3 Guide to Great Governance to benchmark and strengthen your organisation's governance practices.

REFERENCES

CO3 GUIDE TO GREAT GOVERNANCE CODE OF GOVERNANCE

CHAPTER FOUR

STRATEGIC LEADERSHIP AND PLANNING

WHAT TO LEARN

Strategic leadership is about setting a clear direction, aligning people and resources, and adapting to change. In your first few months, you need to understand both your organisation's current strategy and the wider context in which it operates.



KEY CONCEPTS

- **Mission, Vision, and Values:** Understand how these guide decision-making and culture.
- **Strategic Planning Cycle:** From environmental scanning to implementation and review.
- **Theory of Change:** How your organisation creates impact.
- **Adaptive Leadership:** Balancing long-term vision with short-term responsiveness.



SECTOR-SPECIFIC INSIGHTS

- **Trends in the NI Voluntary Sector:** Funding volatility, digital transformation, co-design with communities.
- **Policy Environment:** Programme for Government, Department for Communities priorities.
- **Stakeholder Expectations:** Funders increasingly expect measurable outcomes and collaboration.



RECOMMENDED READING

CO3 LEADERSHIP RESOURCES
ACEVO'S FIRST 100 DAYS TOOLKIT

WHAT TO DO

STEP 1 REVIEW THE CURRENT STRATEGY

- Read your organisation's strategic plan and business plan.
- Identify when it was last updated and how it was developed and conduct a full review of the strategic plan or an update

STEP 2 ENGAGE KEY STAKEHOLDERS

- Hold strategic conversations with the board, senior team, and frontline staff.
- Ask: What's working? What's missing? What's changing?

STEP 3 CONDUCT A STRATEGIC HEALTH CHECK

- Use tools like SWOT, PESTLE, or Theory of Change mapping.
- Assess alignment between strategy, operations, and impact.
- Conduct a stakeholder perception survey
- Conduct surveys to assess satisfaction of service users/clients

STEP 4 BEGIN A STRATEGIC REFRESH (IF NEEDED)

- If your strategy is outdated or unclear, initiate a light-touch review.
- Use CO3 consultants or facilitators if external support is needed.

STEP 5 ALIGN THE TEAM

- Ensure everyone understands the strategic direction.
- Link team goals and KPIs to strategic priorities.



TOOLS AND TEMPLATES

- Strategic Health Check Template – see next
- [SWOT & PESTLE Analysis Worksheets](#)
- Theory of Change Model
- Create a Board Strategy Session Agenda

STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

MISSION & VISION ALIGNMENT

- ☐ Is our mission still relevant to the needs of our beneficiaries?
- ☐ Are our activities clearly aligned with our stated vision and values?
- ☐ Have we reviewed our Theory of Change in the past 12 months?

NOTES:



STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

GOVERNANCE & LEADERSHIP

- ☐ Do we have a diverse, skilled, and engaged board of trustees?
- ☐ Are we compliant with the Charity Commission for Northern Ireland (CCNI) regulations?
- ☐ Have we conducted a recent board skills audit and training?
- ☐ Are succession plans in place for key leadership roles?

NOTES:



STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

FINANCIAL SUSTAINABILITY

- ☐ Do we have a clear and diversified funding strategy?
- ☐ Are we managing reserves in line with our reserves policy?
- ☐ Have we reviewed our fundraising practices for ethical compliance?
- ☐ Are we maximising opportunities for Gift Aid and local grants?

NOTES:

STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

IMPACT & EVALUATION

- ☐ Are we measuring outcomes, not just outputs?
- ☐ Do we have recent impact data to share with funders and stakeholders?
- ☐ Are we using feedback from service users to improve delivery?
- ☐ Have we published an impact report or annual review?

NOTES:



STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

STAKEHOLDER ENGAGEMENT

- ☐ Are we actively engaging with beneficiaries, volunteers, and partners?
- ☐ Do we have a stakeholder map and engagement plan?
- ☐ Are we collaborating with other charities or public bodies in NI?
- ☐ Are we visible and trusted in our local community?

NOTES:

STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

COMPLIANCE & RISK

- ☐ Are we up to date with safeguarding, GDPR, and health & safety policies?
- ☐ Have we reviewed our risk register in the last 6 months?
- ☐ Are we insured appropriately for our activities?
- ☐ Are we prepared for cyber threats and data breaches?

NOTES:

STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

PEOPLE & CULTURE

- ☐ Do we have a clear HR strategy for staff and volunteers?
- ☐ Are we supporting staff wellbeing and development?
- ☐ Are we inclusive and reflective of the communities we serve?
- ☐ Have we conducted a recent staff/volunteer satisfaction survey?

NOTES:



STRATEGIC HEALTH CHECKLIST FOR NORTHERN IRELAND CHARITIES

STRATEGIC POSITIONING

- ☐ Are we aware of key policy developments in Northern Ireland (e.g. health, education, community)?
- ☐ Are we influencing or responding to relevant public consultations?
- ☐ Are we leveraging local networks (e.g. NICVA, CO3, local councils)?
- ☐ Are we prepared for political and funding uncertainty?

NOTES:

WHAT TO ACHIEVE

Outcome	Description
Strategic Clarity	You and your board share a clear understanding of the organisation's direction.
Team Alignment	Staff understand how their work contributes to strategic goals.
Roadmap for Action	A 12–18 month plan that outlines key priorities and milestones.

HOW TO ACCESS RESOURCES

Resource	Description	Links
NCVO	Theory of Change	Theory of Change
ACEVO Toolkit	Strategic planning and leadership tools	ACEVO
CO3 Leadership Resources (Financial Sustainability Risk/ Measuring Impact)	Strategy workshops and CEO support	Home - CO3
Institute of Directors (IoD)	Strategic leadership training	Home





CASE EXAMPLE

CASE: THRIVE TOGETHER NI

The new CEO of Thrive Together NI inherited a strategic plan that was three years old and no longer fit for purpose. He conducted a rapid review using a SWOT analysis and stakeholder interviews. With board support, he led a six-week refresh process, resulting in a new 18-month roadmap focused on digital inclusion and partnership working. Staff reported greater clarity and motivation, and the organisation secured two new grants aligned with its updated priorities.

CHAPTER SUMMARY

- Strategic leadership is about clarity, alignment, and adaptability.
- Use your first 100 days to assess your organisation's direction and engage others in shaping the future.
- A clear, shared strategy builds confidence and enables impact.

CHAPTER FIVE

FINANCIAL OVERSIGHT AND RISK MANAGEMENT

WHAT TO LEARN

As Chief Executive, you are accountable for the financial health and risk management of your organisation. You don't need to be an accountant, but you must understand the financial story behind the numbers and ensure robust systems are in place.

➤ FINANCIAL FUNDAMENTALS

- **Income Streams:** Grants, contracts, donations, trading, investments.
- **Reserves Policy:** Understand your organisation's approach to financial sustainability.
- **Management Accounts:** Monthly or quarterly reports showing income, expenditure, and variances.
- **Annual Accounts:** Audited or independently examined financial statements.

➤ RISK MANAGEMENT

- **Risk Register:** A live document identifying key risks, likelihood, impact, and mitigation.
- **Types of Risk:**
 - Financial (e.g. funding cuts)
 - Operational (e.g. staff turnover)
 - Reputational (e.g. safeguarding issues)
 - Strategic (e.g. mission drift)
 - Compliance (e.g. GDPR, charity law)

➤ REGULATORY REQUIREMENTS

- **Charity Commission NI:** Annual returns and financial reporting.
- **Funders:** May require specific financial reports or audits.

➤ KEY RESOURCES:

- [CCNI Financial Reporting Guidance](#)
- CO3 Leadership Resources – [Leaders Guide to Financial Resilience](#)
- [The CO3 Guide to Great Governance](#)

WHAT TO DO



STEP 1 MEET WITH YOUR FINANCE LEAD

- Review current financial position, cash flow, and reserves.
- Get familiar with the current year's budget, note variances, ask questions to understand the "why"
- Understand key income sources and funding timelines, in particular it is vital to understand the impact on cash flow.

STEP 2 REVIEW FINANCIAL DOCUMENTS

- Examine the latest management accounts and annual accounts.
- Check for any audit recommendations or flagged issues.

STEP 3 ASSESS FINANCIAL CONTROLS

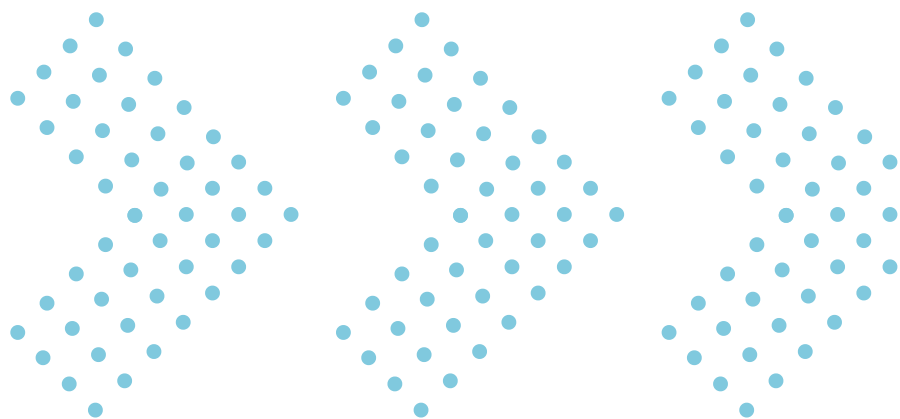
- Review financial policies and procedures.
- Ensure segregation of duties, authorisation limits, and fraud prevention measures are in place.

STEP 4 UPDATE THE RISK REGISTER

- Review existing risks and mitigation plans.
- Add any new risks identified during your onboarding.

STEP 5 ENGAGE THE BOARD

- Ensure the board receives timely, accurate financial reports.
- Work with the Finance Committee on the board to ensure robust financial oversight.
- Discuss financial strategy and sustainability planning.



TOOLS & TEMPLATES

- **RISK REGISTER TEMPLATE**

An approach to managing risk is set out in the [CO3 Guide to Great Governance](#) Section 12.

- **RESERVES POLICY CHECKLIST**

- **FINANCE INDUCTION PACK FOR CEOS**

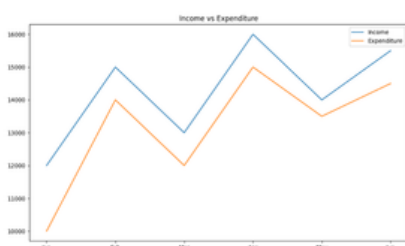
- **FINANCIAL DASHBOARD TEMPLATE**

The financial dashboard should include information on:

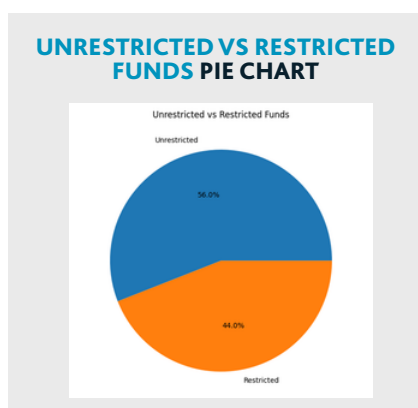
- Total Income vs Expenditure
- Surplus / Deficit
- Unrestricted vs Restricted Funds
- Total Reserves and Target
- Reserves Status
- Funding Source Breakdown (Government, Trusts, Donations, Trading, Other)

So, it may produce visualisations like this:

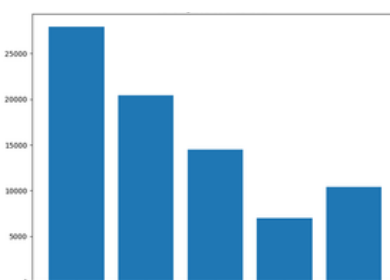
**INCOME VS EXPENDITURE
LINE CHART**



**UNRESTRICTED VS RESTRICTED
FUNDS PIE CHART**



**FUNDING SOURCE BREAKDOWN
BAR CHART**



WHAT TO ACHIEVE

Outcome	Description
Financial Confidence	You understand the organisation's financial position and funding model.
Risk Awareness	Key risks are identified, monitored, and mitigated.
Board Assurance	The board is confident in financial oversight and sustainability planning.

HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3	Leadership and financial governance support	🌐 Home - CO3
Charity Commission NI	Financial reporting and compliance	🌐 Home The Charity ...





CASE EXAMPLE

CASE: BRIDGEWAYS NI

The incoming CEO of Bridgeways NI discovered that the organisation had no formal reserves policy and a risk register that hadn't been updated in two years. They worked with the finance officer to develop a new reserves strategy and facilitated a board workshop on risk. Within 90 days, the organisation had a refreshed risk register, improved financial reporting, and a new funding pipeline in development.

CHAPTER SUMMARY

- Financial oversight is a core leadership responsibility—understand the numbers and what they mean.
- Risk management is not just about avoiding problems; it's about building resilience.
- Work closely with your finance lead and board to ensure transparency, sustainability, and strategic foresight.



CHAPTER SIX

STAKEHOLDER ENGAGEMENT AND COMMUNICATIONS

WHAT TO LEARN

Effective stakeholder engagement is essential for building credibility, securing funding, and delivering impact. As CEO, you are the face and voice of your organisation—internally and externally.

➤ STAKEHOLDER LANDSCAPE

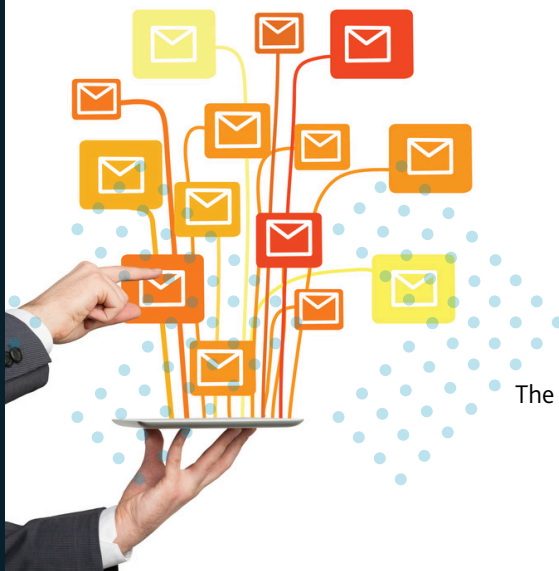
INTERNAL	Staff, volunteers, board members.
EXTERNAL	Funders, service users, partners, regulators, media, local communities.
INFLUENCERS	Local councillors, MLAs, sector leaders, journalists.

➤ COMMUNICATION PRINCIPLE

AUTHENTICITY	Speak with clarity and purpose.
CONSISTENCY	Align messaging across platforms and people.
AUDIENCE AWARENESS	Tailor messages to different stakeholders.

➤ SECTOR-SPECIFIC CONSIDERATIONS

- Many stakeholders in NI's voluntary sector are **relationship-driven**—trust is built through personal connection.
- Funders increasingly expect **impact storytelling** and **evidence-based communication**.



WHAT TO DO

STEP 1 MAP YOUR STAKEHOLDERS

- Identify key individuals and organisations.
- Categorise by influence, interest, and relationship status.

STEP 2 REVIEW YOUR COMMUNICATIONS STRATEGY

- Assess current channels (website, social media, newsletters).
- Evaluate tone, frequency, and effectiveness.

STEP 3 ENGAGE KEY STAKEHOLDERS

- Schedule introductory meetings with funders, partners, and community leaders.
- Attend sector events and forums (e.g. CO3, NICVA, local networks).

STEP 4 REFRESH YOUR NARRATIVE

- Develop a clear, compelling message about your organisation's mission, impact, and future direction.
- Align messaging across staff, board, and communications materials.

STEP 5 ESTABLISH FEEDBACK LOOPS

- Create opportunities for stakeholders to share input (e.g. surveys, listening sessions).
- Use feedback to inform strategy and build trust.

RECOMMENDED READING

[CO3 – Chief Officers 3rd Sector](#)

[Visit CO3 website](#)

[Givebutter – Nonprofit Communications Plan Template](#)

A step-by-step guide with a free downloadable template

[CharityComms – Comms Templates Library](#)

[Explore Charitycomms templates](#)





TOOLS & TEMPLATES

STAKEHOLDER MAPPING GRID

The Power-Interest Grid is a valuable tool for managing stakeholders in a project. It helps you categorise stakeholders based on their level of power and interest in the project, allowing you to tailor your engagement strategies accordingly. Here's how to use it:

1. IDENTIFY STAKEHOLDERS

Start by listing all individuals, groups, or organisations that are affected by or can affect your project. This could include funders, board members, staff, volunteers, service users, and community partners.

2. ASSESS POWER AND INTEREST

For each stakeholder, assess their level of power (the ability to influence the project) and interest (the degree to which they care about the project's outcomes). Power can be high or low, and interest can be high or low.

3. MAP STAKEHOLDERS

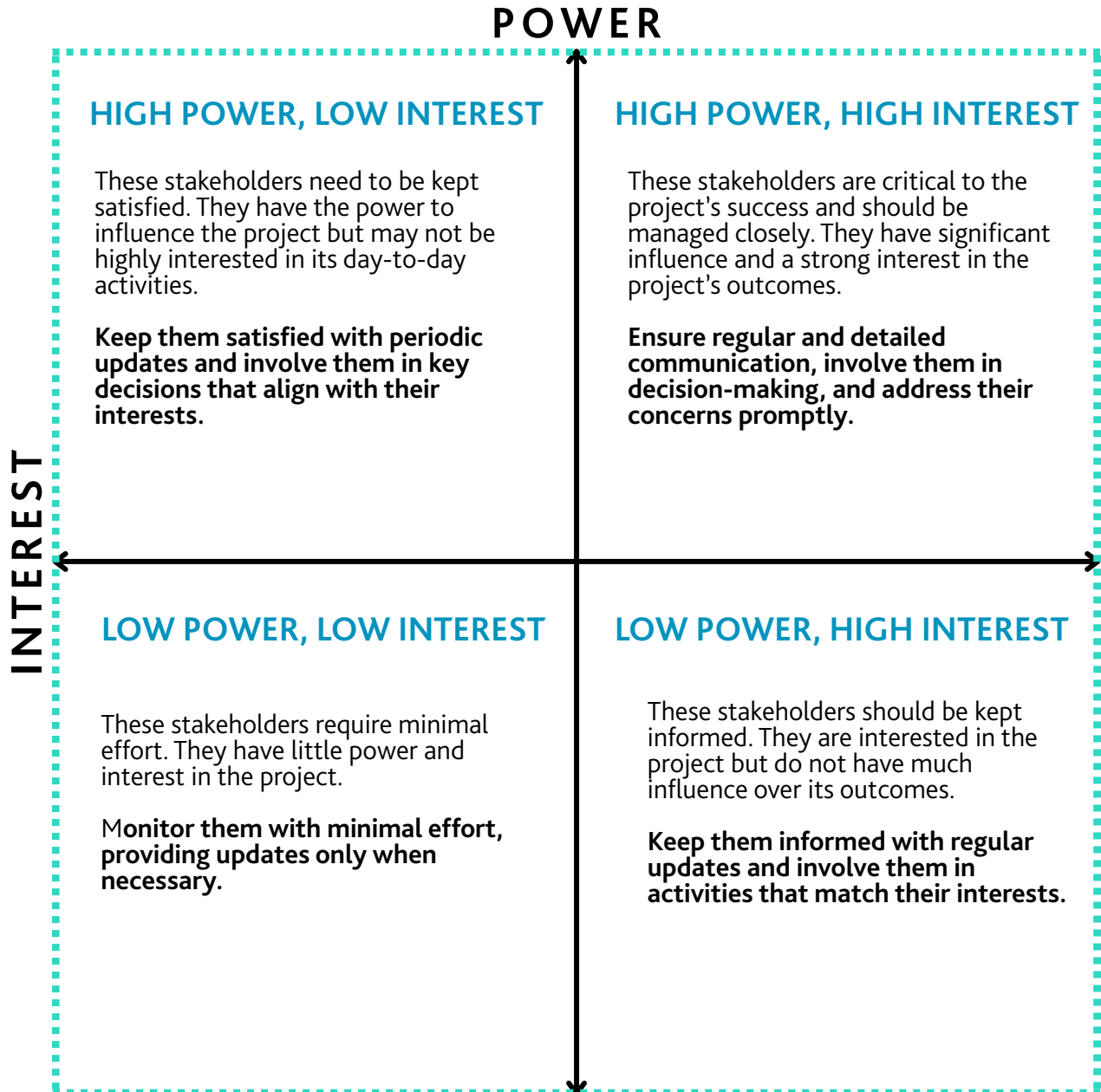
Place each stakeholder on the Power-Interest Grid, which is divided into four quadrants (see next page).

4. DEVELOP ENGAGEMENT STRATEGIES

Based on their position in the grid, tailor your communication and involvement strategies for each stakeholder group.



TOOLS & TEMPLATES



Using the Power-Interest Grid helps you prioritise your efforts and ensure that you are effectively managing your stakeholders based on their influence and interest in the project. This approach can lead to better stakeholder relationships and a higher likelihood of project success.

COMMUNICATIONS AUDIT CHECKLIST

A communications audit checklist is a tool used to evaluate the effectiveness of an organisation's communication strategies and practices. It helps identify strengths, weaknesses, and areas for improvement in both internal and external communications. Here's a detailed explanation of what it typically includes and how to use it:

COMPONENTS OF A COMMUNICATIONS AUDIT CHECKLIST



1 OBJECTIVES AND GOALS

Define the purpose of the audit. What do you want to achieve? This could include improving stakeholder engagement, enhancing brand visibility, or streamlining internal communications.

2

STAKEHOLDER ANALYSIS

Identify key stakeholders and assess how well your communications meet their needs. This includes employees, board members, funders, service users, and community partners.

3

COMMUNICATION CHANNELS

List all the communication channels you use, such as email, social media, newsletters, website, and face-to-face meetings. Evaluate the effectiveness of each channel.

4

MESSAGE CONSISTENCY

Check for consistency in messaging across different channels. Ensure that your core messages align with your organisation's mission, vision, and values.

5

CONTENT QUALITY

Define the purpose of the audit. What do you want to achieve? This could include improving stakeholder engagement, enhancing brand visibility, or streamlining internal communications.

6

AUDIENCE ENGAGEMENT

Measure how well your communications engage your audience. Look at metrics such as open rates, click-through rates, social media interactions, and feedback from stakeholders.

7

FEEDBACK MECHANISMS

Evaluate the systems you have in place for receiving and responding to feedback. This could include surveys, comment sections, and direct communication channels.

8

COMPLIANCE AND LEGAL CONSIDERATIONS

Ensure that your communications comply with relevant laws and regulations, such as data protection and privacy laws.

9

RESOURCE ALLOCATION

Review the resources allocated to your communications efforts, including budget, staff, and technology. Determine if they are sufficient and used effectively.

10

ACTION PLAN

Based on your findings, develop an action plan to address any identified issues and improve your communication strategies.



HOW TO USE A COMMUNICATIONS AUDIT CHECKLIST

PREPARATION

Gather all relevant documents and data, such as communication materials, feedback reports, and performance metrics. Define the scope and objectives of the audit.

STAKEHOLDER INVOLVEMENT

Engage key stakeholders in the audit process. This could include interviews, surveys, and focus groups to gather their perspectives on your communications.

DATA COLLECTION

Use the checklist to systematically review each component. Collect data and evidence to support your assessments.

ANALYSIS

Analyse the data to identify patterns, strengths, and areas for improvement. Compare your findings against best practices and benchmarks.

REPORTING

Compile your findings into a comprehensive report. Highlight key insights, strengths, weaknesses, and recommendations for improvement.

ACTION PLAN

Develop a detailed action plan based on your findings. Set clear goals, timelines, and responsibilities for implementing improvements.



IMPLEMENTATION

Execute the action plan, making necessary changes to your communication strategies and practices.

MONITORING AND EVALUATION

Continuously monitor the effectiveness of your communications and evaluate the impact of the changes. Adjust your strategies as needed to ensure ongoing improvement.

Using a communications audit checklist helps ensure that your organisation's communications are effective, aligned with your goals, and responsive to the needs of your stakeholders. It provides a structured approach to identifying and addressing communication challenges, ultimately enhancing your overall communication strategy.

MESSAGING FRAMEWORK TEMPLATE

CORE MESSAGE

This is the central idea or value proposition that you want to communicate. It should be concise, compelling, and reflect the essence of your organisation or project.

SUPPORTING MESSAGES

These are the key points that reinforce the core message. They provide additional context, evidence, or benefits that support the main idea.

AUDIENCE SEGMENTS

Identify the different groups you need to communicate with, such as funders, board members, staff, volunteers, service users, and community partners. Each segment may require tailored messages.

KEY MESSAGES FOR EACH AUDIENCE

Identify the different groups you need to communicate with, such as funders, board members, staff, volunteers, service users, and community partners. Each segment may require tailored messages.

PROOF POINTS

These are facts, statistics, testimonials, or examples that provide evidence to support your key messages. They help build credibility and make your messages more persuasive.

TONE AND STYLE

Define the tone and style of your communications. This could be formal, informal, friendly, authoritative, etc., depending on your audience and the context.

CHANNELS

List the communication channels you will use to deliver your messages, such as email, social media, newsletters, website, and face-to-face meetings.

Be sure to regularly review and refine your messaging framework to ensure it remains relevant and effective. Gather feedback from your audience and adjust your messages as needed.



WHAT TO ACHIEVE

Outcome	Description
Stakeholder Map	A clear overview of key relationships and engagement priorities.
Refreshed Messaging	A consistent, compelling narrative aligned with your leadership.
Early Engagement Wins	Positive meetings or collaborations with key funders or partners.

HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3 Events	Networking and leadership forums	🌐 Home - CO3
CO3 Training Courses	Power up your Networks & Maximise LinkedIn	🌐 Home - CO3
Givebutter	Nonprofit Communications Plan Template A step-by-step guide with a free downloadable template	🌐 Free Download: Non...
CharityComms	UK-wide communications network	🌐 CharityComms



CASE EXAMPLE

CASE: CONNECT NI

The new CEO of Connect NI inherited a fragmented communications approach and limited visibility with funders. She conducted a stakeholder mapping exercise, refreshed the organisation's messaging, and launched a monthly impact newsletter. Within 60 days, she had met with three major funders, secured a speaking slot at a CO3 event, and increased social media engagement by 40%.

CHAPTER SUMMARY

- Stakeholder engagement is about building trust, not just broadcasting information.
- As CEO, your visibility and authenticity set the tone for the organisation.
- Early, intentional communication builds credibility and opens doors for collaboration and funding.

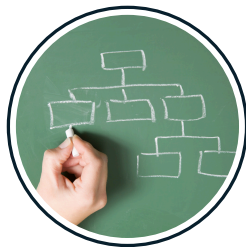
CHAPTER SEVEN

BUILDING RELATIONSHIPS WITH THE BOARD, STAFF, AND COMMUNITY



WHAT TO LEARN

Strong relationships are the foundation of effective leadership. In your first 3 months, you will need to understand the people, culture, and dynamics that shape your organisation.



ORGANISATIONAL STRUCTURE

FORMAL VS. INFORMAL STRUCTURES

Understand both the official hierarchy and the informal influencers.

VALUES IN ACTION

Understand both the official hierarchy and the informal influencers.

COMMUNICATION NORMS

How do people share information, raise concerns, and celebrate success?



BOARD DYNAMICS

ROLES AND EXPECTATIONS

Clarify the board's expectations of you and vice versa.

CHAIR-CEO RELATIONSHIP

This is your most important governance partnership—build it early.

BOARD CULTURE

Is it strategic, operational, passive, or engaged?

CHAPTER SEVEN

BUILDING RELATIONSHIPS WITH THE BOARD, STAFF, AND COMMUNITY



STAFF AND VOLUNTEER ENGAGEMENT

MOTIVATIONS AND MORALE

What drives your team? What challenges do they face?

TEAM STRUCTURE

Understand reporting lines, responsibilities, and capacity.

WELLBEING AND INCLUSION

How are people supported and included?



COMMUNITY CONNECTIONS

SERVICE USERS AND BENEFICIARIES

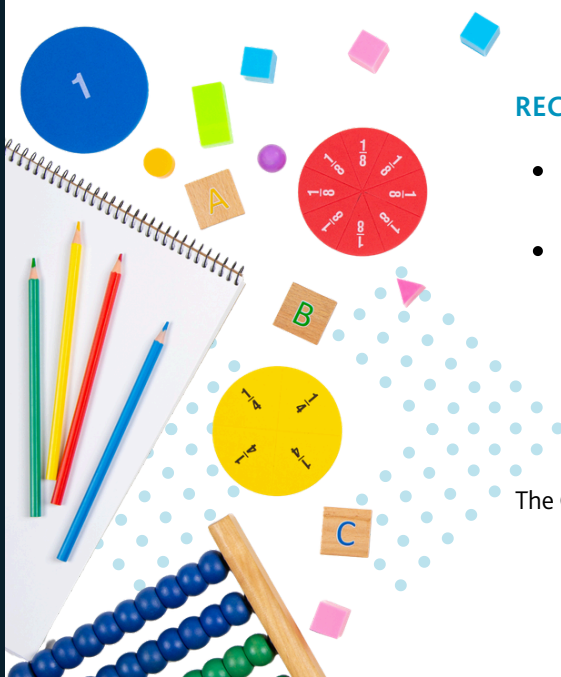
Clarify the board's expectations of you and vice versa
What do they value most about your organisation?

LOCAL NETWORKS

Who are your allies, collaborators, and champions?

RECOMMENDED RESOURCES:

- CO3 Leadership and Governance Resources & Support
- ACEVO CEO Support



WHAT TO DO

STEP 1 HOLD ONE-TO-ONE MEETINGS

- Meet individually with all board members and senior staff.
- Use open questions to understand their perspectives, hopes, and concerns.

STEP 2 VISIT FRONTLINE SERVICES

- Spend time with staff, volunteers, and service users.
- Listen more than you speak—observe culture and operations.

STEP 3 FACILITATE A TEAM LISTENING SESSION

- Create a safe space for staff to share what's working and what's not.
- Use this to inform your early priorities.

STEP 4 BUILD THE CHAIR-CEO RELATIONSHIP

- Agree on communication frequency, decision-making boundaries, and mutual expectations.
- Schedule regular check-ins.

STEP 5 ENGAGE WITH THE WIDER COMMUNITY

- Attend local events, forums, or community meetings.
- Introduce yourself to key partners and stakeholders.



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

LEADERSHIP BEHAVIOURS

- ☐ Are leaders visible and approachable?
- ☐ Do leaders model the organisation's values?
- ☐ Is leadership style more directive or collaborative?
- ☐ How do leaders respond to feedback or challenge?

NOTES:



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

COMMUNICATION NORMS

- ☐ What are the common channels of communication (email, meetings, informal)?
- ☐ Is communication open and transparent?
- ☐ Are staff encouraged to share ideas or concerns?
- ☐ How is information cascaded through the organisation?

NOTES:



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

DECISION-MAKING

- ☐ Who is involved in decision-making processes?
- ☐ Are decisions made quickly or slowly?
- ☐ Is there clarity on how decisions are made and by whom?
- ☐ Are staff empowered to make decisions within their roles?

NOTES:



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

STAFF MORALE AND WELLBEING

- ☐ What is the general mood or energy in the workplace?
- ☐ Do staff appear motivated and engaged?
- ☐ Are there visible signs of stress or burnout?
- ☐ What support systems are in place for staff wellbeing?

NOTES:



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

INCLUSION AND DIVERSITY

- ☐ Is the organisation reflective of the community it serves?
- ☐ Are diverse voices represented in leadership and decision-making?
- ☐ Is inclusive language and behaviour evident?
- ☐ Are there active efforts to promote equity and belonging?

NOTES:



ORGANISATIONAL CULTURE OBSERVATION CHECKLIST

PHYSICAL AND VIRTUAL ENVIRONMENT

- ☐ Is the physical workspace welcoming and accessible?
- ☐ Are there visual cues of the organisation's mission and values?
- ☐ Is the virtual environment (e.g. intranet, remote tools) user-friendly?
- ☐ Are staff equipped with the tools they need to work effectively?

NOTES:



WHAT TO ACHIEVE

Outcome	Description
Trust and Rapport	Built strong relationships with board, staff, and key community members.
Cultural Insight	Gained a deep understanding of organisational values, dynamics, and morale.
Leadership Credibility	Demonstrated approachability, empathy, and commitment to listening.

HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3	CEO peer support and leadership development through the CO3 New to Post Chief Executives Forum including four events a year and participation in the WhatsApp group.	🌐 Home - CO3
ACEVO	CEO mentoring and leadership tools	🌐 ACEVO





CASE EXAMPLE

CASE: HARBOUR HAVEN

The new CEO of Harbour Haven, a community mental health charity, began his role by conducting one-to-one meetings with every staff member and trustee. He also hosted a “listening lunch” with service users. These conversations revealed a disconnect between the board’s strategic vision and frontline realities. By surfacing these insights early, he facilitated a joint board-staff workshop that led to a shared set of priorities and renewed energy across the organisation.

CHAPTER SUMMARY

- Relationships are your most valuable asset as a leader—invest in them early.
- Listening builds trust, reveals insight, and sets the tone for your leadership.
- A strong Chair-CEO partnership and engaged staff team are essential for long-term success.



CHAPTER EIGHT

SETTING PRIORITIES AND ACHIEVING EARLY WINS

WHAT TO LEARN

Early wins are small but meaningful achievements that demonstrate leadership, build trust, and create momentum. In your first few months, it's important to identify what matters most and where you can make a visible difference quickly.

➤ STRATEGIC PRIORITISATION

- **Urgent vs. Important:** Use tools like the Eisenhower Matrix to distinguish between tasks that demand immediate attention and those that drive long-term impact.
- **Organisational Pain Points:** Identify areas of friction, inefficiency, or low morale.
- **Quick Wins vs. Deep Work:** Balance short-term achievements with foundational work that takes longer.

➤ LEADERSHIP PSYCHOLOGY

- **Credibility Building:** Early wins help establish your authority and leadership style.
- **Confidence Boosting:** They reassure staff, board, and stakeholders that progress is possible.
- **Change Management:** Small successes pave the way for larger transformations.



Recommended Reading:

- [ACEVO's First 100 Days Toolkit](#)
- [CO3 Leadership Development Resources](#)
- [Harvard Business Review: Early Wins in Leadership](#)
- Eisenhower Matrix

CHAPTER EIGHT

EISENHOWER MATRIX

		URGENT	NOT URGENT
IMPORTANT	QUADRANT I: URGENT AND IMPORTANT	DO Critical tasks that need immediate attention.	QUADRANT II: Important but Not Urgent SCHEDULE Tasks that are essential for future success but don't require immediate action.
	QUADRANT III: Urgent but Not Important	DELEGATE Tasks that need to be addressed soon but are not crucial. They can often be delegated.	QUADRANT IV: Urgent but Not Important DELETE Tasks that are low-priority and can often be eliminated.
NOT IMPORTANT			

WHAT TO DO

STEP 1 CONDUCT A RAPID ORGANISATIONAL REVIEW

- Use feedback from staff, board, and stakeholders to identify key issues.
- Look for areas where small changes could have a big impact.

STEP 2 SET 2-3 ACHIEVABLE GOALS

- Choose goals that are visible, meaningful, and aligned with your mission.
- Examples: improving internal communications, updating a policy, launching a new partnership.

STEP 3 COMMUNICATE YOUR PRIORITIES

- Share your goals with staff and board.
- Paint a picture of what success looks like.
- Explain why goals matter and how you'll measure success.

STEP 4 TRACK AND CELEBRATE PROGRESS

- Create simple dashboards or updates to show movement.
- Celebrate milestones publicly to build morale.
- Thank your team.

STEP 5 LINK EARLY WINS TO LONGER-TERM STRATEGY

- Position your achievements as stepping stones to broader goals.
- Use them to build support for future initiatives.

TOOLS & TEMPLATES

- Create a Priority Setting Worksheet Using Eisenhower Matrix
- Create early Wins Tracker
- Create a Quick Impact Assessment Tool



QUICK IMPACT ASSESSMENT TOOL

1. GOAL ALIGNMENT



Are short-term goals aligned with the charity's mission?

Rating (1=Low, 5=High): _____

NOTES:



Have key priorities been clearly communicated to staff and trustees?

Rating (1=Low, 5=High): _____

NOTES:



Are there measurable objectives in place for the first 6 months?

Rating (1=Low, 5=High): _____

NOTES:

2. STAKEHOLDER FEEDBACK



Have you gathered feedback from staff, trustees, and beneficiaries?

Rating (1=Low, 5=High): _____

NOTES:

QUICK IMPACT ASSESSMENT TOOL



Is there evidence of improved stakeholder confidence?

Rating (1=Low, 5=High): _____

NOTES:



Are communication channels open and effective?

Rating (1=Low, 5=High): _____

NOTES:

3. EARLY WINS



Are there measurable objectives in place for the first 6 months?

Rating (1=Low, 5=High): _____

NOTES:



Are there visible signs of progress or change?

Rating (1=Low, 5=High): _____

NOTES:



Have you celebrated early successes with the team?

Rating (1=Low, 5=High): _____

NOTES:

QUICK IMPACT ASSESSMENT TOOL

4. OPERATIONAL IMPROVEMENTS



Have any processes been streamlined or clarified?

Rating (1=Low, 5=High): _____

NOTES:



Are roles and responsibilities clearer?

Rating (1=Low, 5=High): _____

NOTES:



Is there improved efficiency or responsiveness?

Rating (1=Low, 5=High): _____

NOTES:

5. CULTURE SHIFTS



Is there a noticeable change in morale or engagement?

Rating (1=Low, 5=High): _____

NOTES:

QUICK IMPACT ASSESSMENT TOOL



Are values being demonstrated in daily behaviours?

Rating (1=Low, 5=High): _____

NOTES:



Is there a shift toward a more inclusive or collaborative culture?

Rating (1=Low, 5=High): _____

NOTES:



WHAT TO ACHIEVE

Outcome	Description
Visible Progress	Achieved 2–3 tangible improvements that staff and stakeholders can see.
Leadership Credibility	Demonstrated decisiveness, responsiveness, and alignment with mission.
Organisational Momentum	Created a sense of possibility and forward movement.



HOW TO ACCESS RESOURCES

Resource	Description	Links
ACEVO Toolkit	Leadership planning and early wins guidance	🌐 ACEVO
CO3 Leadership Resources	Coaching, mentoring, and strategic support	🌐 Home - CO3
Harvard Business Review	Leadership and change management articles	🌐 Harvard Business R...





CASE EXAMPLE

CASE: INSPIRE YOUTH NI

The new CEO of Inspire Youth NI identified that staff felt disconnected from leadership. Within his first 30 days, he launched a weekly internal newsletter, introduced monthly team check-ins, and updated the staff handbook. These quick wins improved morale, increased transparency, and laid the groundwork for a broader organisational review.

CHAPTER SUMMARY

- Early wins build trust, credibility, and momentum.
- Focus on actions that are achievable, visible, and aligned with your values.
- Use your first 100 days to demonstrate leadership and set the tone for long-term impact.

CHAPTER NINE

PERSONAL RESILIENCE AND LEADERSHIP DEVELOPMENT

WHAT TO LEARN

Leadership in the voluntary and community sector is deeply rewarding—but also demanding. You'll need to develop strategies to maintain your wellbeing, reflect on your leadership style, and invest in your ongoing development.

➤ UNDERSTANDING RESILIENCE

- **Emotional Resilience:** Managing stress, uncertainty, and emotional labour.
- **Boundaries and Balance:** Knowing when to say no, delegate, or pause.
- **Energy Management:** Prioritising rest, reflection, and recovery.

➤ LEADERSHIP SELF-AWARENESS

- **Leadership Styles:** Understand your natural style (e.g. transformational, servant, strategic).
- **Feedback and Reflection:** Seek honest input and create space for self-review.
- **Imposter Syndrome:** Common among new leaders—recognise it and reframe it.

➤ DEVELOPMENT PATHWAYS

- **Peer Learning:** Learning from other CEOs through networks like CO3 and ACEVO.
- **Coaching and Mentoring:** Structured support to reflect, grow, and problem-solve.
- **Formal Training:** Leadership programmes, governance courses, and sector-specific CPD.

Recommended Resources

- [CO3 Leadership Development](#)
- [ACEVO CEO Support](#)
- [IoD Leadership for Directors](#)
- [Mind's Workplace Wellbeing Resources](#)

WHAT TO DO

STEP 1 ASSESS YOUR LEADERSHIP NEEDS

- Reflect on your strengths, gaps, and aspirations.
- Use a leadership self-assessment tool or 360° feedback.

STEP 2 CREATE A PERSONAL DEVELOPMENT PLAN

- Set 2–3 development goals for the next 6–12 months.
- Include both formal and informal learning.

STEP 3 JOIN A PEER NETWORK

- Connect with other CEOs through CO3, ACEVO, or local networks.
- Attend leadership forums, roundtables, or retreats.

STEP 4 CONSIDER COACHING OR MENTORING

- Explore options through CO3 or ACEVO.
- Choose someone who understands the sector and your context.

STEP 5 LINK EARLY WINS TO LONGER-TERM STRATEGY

- Schedule regular breaks, reflection time, and wellbeing check-ins.
- Set boundaries around availability and workload.

TOOLS & TEMPLATES

- Check for Leadership Self-Assessment Tools
- Check for Personal Development Plan Template
- [CEO Wellbeing Checklist](#)



Use a Reflective Journal

Journalling is a powerful tool which can enhance both wellbeing and professional productivity. In terms of improving wellbeing journalling fulfils a number of practical techniques:



Emotional Release

Journalling provides a safe space to express and process emotions. Writing about your feelings can help you understand and manage them better, reducing stress and anxiety.



Problem-Solving

Writing about challenges and brainstorming solutions can help you approach problems more creatively and effectively. It can also provide a sense of control and clarity.



Self-Reflection

Regular journaling encourages self-reflection, helping you gain insights into your thoughts, behaviours, and patterns. This self-awareness can lead to personal growth and improved mental health.



Mindfulness

Journaling encourages mindfulness by bringing your attention to the present moment. This practice can reduce rumination and promote a sense of calm and focus.



Gratitude Practice

Including gratitude entries in your journal can shift your focus from negative to positive aspects of your life. This practice has been shown to increase overall happiness and life satisfaction.

Practical Tips for Effective Journaling



Consistency

Make journaling a regular habit, whether daily, weekly, or monthly.

Honesty

Be honest with yourself about your feelings, achievements, and challenges.

Self-Compassion

Practice self-compassion and avoid being overly critical of yourself.

Action-Oriented

Use your reflections to set actionable goals and make positive changes.

Seek Support

Share your reflections with a mentor, coach, or peer network for additional support and insights.

WHAT TO ACHIEVE

Outcome	Description
Self-Awareness	Clear understanding of your leadership style, needs, and goals.
Support Network	Connected with peers, mentors, or coaches for ongoing support.
Resilience Plan	Established habits and boundaries to sustain your energy and wellbeing.

HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3	CEO peer support, coaching, and leadership programmes	🌐 Home - CO3
Institute of Directors (IoD)	Leadership training and CPD	🌐 Home
Mind	Mental health and wellbeing resources	🌐 We're Mind, the me...



CASE EXAMPLE

CASE: LEADING FORWARD NI

The CEO of Leading Forward NI found himself overwhelmed by competing demands in his first few months. He joined the CO3 New to Post Chief Executives Forum, where he connected with other leaders facing similar challenges. Through regular meetings and check-ins, he developed a personal resilience plan, reduced his working hours slightly, and introduced reflective journaling. His confidence and clarity improved significantly, and he reported feeling more “in control and connected” by the end of his first three months.

CHAPTER SUMMARY

- You can't lead others effectively if you're running on empty—resilience is a leadership skill.
- Invest in your own growth through reflection, support, and structured development.
- Peer networks, coaching, and wellbeing practices are essential tools for sustainable leadership.



CHAPTER EIGHT

FINAL REFLECTIONS AND NEXT STEPS

WHAT TO LEARN

The first three months in the role of chief executive are just the beginning of your leadership journey. This is a time to reflect on what you've learned, how you've grown, and where you want to go next.

➤ KEY THEMES TO REFLECT ON

- **Leadership Impact:** How has your presence influenced the organisation so far?
- **Organisational Readiness:** What foundations have you laid for future success?
- **Learning and Growth:** What surprised you? What challenged you? What inspired you?

➤ TRANSITIONING FROM "NEW" TO "ESTABLISHED" CEO

- Move from listening and observing to leading and shaping.
- Shift from short-term wins to long-term strategy and culture-building.
- Begin to embed systems, values, and practices that reflect your leadership vision.

WHAT TO DO

STEP 1 CONDUCT A FIRST 3 MONTHS REVIEW

- Reflect on your goals, achievements, and lessons learned.
- Use feedback from staff, board, and stakeholders.

STEP 2 SHARE A FIRST 3 MONTHS REPORT

- Create a short internal report or presentation summarising:
 - What you've done
 - What you've learned
 - What's next
- Use this to reinforce transparency and build trust.
- Present this to your board.

STEP 3 SET MEDIUM-TERM GOALS

- Identify 3–5 strategic priorities for the next 6–12 months.
- Align these with your board and senior team.

STEP 4 SCHEDULE A BOARD STRATEGY SESSION

- Use your momentum to co-create a shared vision for the future.
- Consider external facilitation if helpful.

STEP 5 CELEBRATE AND RECHARGE

- Acknowledge your progress and the contributions of others.
- Take time to rest and reflect before the next phase.



TOOLS & TEMPLATES

- Create a First 3 Months Reflection Template
- Create an Internal Report Slide Deck
- Create a Strategic Priorities Planner
- Create a Board Strategy Session Agenda

WHAT TO ACHIEVE

Outcome	Description
Clarity and Confidence	You understand your impact and are ready to lead with purpose.
Shared Direction	Your board and team are aligned around the next phase of work.
Leadership Momentum	You've built trust, credibility, and a platform for long-term success.



HOW TO ACCESS RESOURCES

Resource	Description	Links
CO3 Leadership Resources	Coaching, mentoring, and strategic support	🌐 Home - CO3
ACEVO Toolkit	Leadership planning and early wins guidance	🌐 ACEVO
Institute of Directors (IoD)	Leadership and board development	🌐 Home





CASE EXAMPLE

CASE: FUTURE PATHWAYS NI

After completing their first 100 days, the CEO of Future Pathways NI shared a reflective report with their board and staff. It included key achievements, lessons learned, and a roadmap for the next year. This transparency, built trust and helped secure board approval for a new strategic planning process. Staff reported feeling "seen and heard," and the CEO felt more confident stepping into a long-term leadership role.

CHAPTER SUMMARY

- Your first few months are a foundation, not a finish line.
- Reflect, share, and plan forward with intention.
- Leadership is a journey—stay curious, stay connected, and stay grounded in your values.



QUILTER
CHEVIOT



Chief Officers 3rd Sector

To learn more about us:

www.co3.org.uk

