



[New CEO Leadership Roundtable](#)
Council on Foundations Annual Conference 2013
Sunday, April 7

A. Objectives:

1. Create a safe space for new CEOs to consult with each other and veteran leaders.
2. Build helpful peer-to-peer CEO connections that last beyond the conference.
3. Better position the Council as a leading resource for CEOs (new and established).

B. Takeaways

- ❖ Peer Network
- ❖ Management Tools and Resources
- ❖ Insider Insights
- ❖ Confidential, Expert Advice and Coaching

C. Program

Welcome and Introductions

Part 1: Overview of Philanthropy—Getting the Lay of the Land

Part 2: Why Were You Hired? Defining the CEO's Role in the Organization and Community

Part 3: If Only I Had Known... Your First 100 Days As CEO

Part 4: CEO Secrets—What CEOs Can't Tell...the Board/Staff/Donors/Partners/Etc.

Part 5: Private CEO Reception with Colleagues

D. Agenda

10–10:15 a.m. Welcome and Introductions

Introduce speakers and facilitators using the bomb and brilliance format. Each person will provide their name, foundation, number of years as a CEO, one thing they tried as a CEO that they failed at and learned from, and one thing that was a stroke of brilliance on their part as a CEO.

10:15–11 a.m. Part 1: Overview of Philanthropy—Getting the Lay of the Land

Design: Coffee and conversation setup with philanthropy focused video snippets or Council's Pinterest page as grounding in "why we do what we do."

What is the real power of philanthropy? What critical challenges does philanthropy face as a field? To better plan for the future, new CEOs (especially those from outside the field) will learn both key lessons and current trends, drawing on the rich history of philanthropy in all its variety and complexity. ("When you've seen one foundation, you've seen one foundation.")

11:30 a.m.–1:30 p.m. BREAK FOR OPENING PLENARY OF THE CONFERENCE

2–2:40 p.m. Part 2: Why Were You Hired? Defining the CEO's Role in the Organization & Community

Design: Role-play scenarios with table discussions on the best way to handle situations—report out.

How do you define your success as CEO? What do you keep or change in your organization? The first year for any CEO often requires rapid assessment, transition, and action – from staffing and operations to Board governance and community outreach. Find out what change management tools will help you best align internal expectations and systems with your unique vision and leadership style. Learn from fellow CEO’s how to navigate the minefield of potentially explosive issues such as human resources, communications, transparency, finances, CEO-board relations, and benchmarks and metrics for tracking the foundation’s success.

2:40–3:30 p.m. Part 3: If Only I Had Known... Your First 100 Days as CEO

What do you wish you had known in your first 100 days as CEO? New and seasoned leaders will share blind spots, surprises, and war stories. The role of a CEO is to facilitate the implementation of the foundation’s mission; set the culture of the organization; and even act as the foundation’s ambassador to the media, stakeholders, and colleagues in the field. Listen to a diverse group of CEOs as they offer a blueprint of the pivotal questions for every CEO to consider during and after the first few months on the job. Discover what kind of self-awareness and strategies can help ensure your success—from navigating personal attributes versus perceived attributes in the CEO role and carving out time to rejuvenate to building your own personal ‘board of directors’ and a strong network.

3:30–4 p.m. BREAK

4–5 p.m. Part 4: CEO Secrets—What CEO’s Can’t Tell... the Board/Staff/Donors/Partners/Etc.

Design: A group of three or four CEOs gather at a table. Each poses a major question or challenge they are currently facing. Colleagues ask brief clarifying questions and share relevant experiences, resources, and thoughtful comments to assist the CEO in developing potential solutions and approaches to the original challenge. Each person in the group can seek peer advice.

It’s not only lonely at the top. It can also be dangerously isolating. Where can CEO’s find experienced, wise counsel that is private, candid, confidential, constructive and unbiased? This unique salon matches new CEO’s with peers and veteran leaders to tackle individual “pain points” or other sensitive issues that they face on the job. The goal of this session is to identify key struggles and begin creating peer networks to address pressing CEO challenges.

NOTE: Participants may be surveyed prior to the program to help the planning group understand the current questions and challenges their peers are facing.

5–6 p.m. Part 5: Private CEO Reception with Colleagues

A casual and informal opportunity for participants to meet new colleagues, strengthen connections or further conversations from earlier in the day.