

You're It!

Shared Wisdom for Successfully Leading Organizations
from Both a Seasoned and a First-Time CEO

© 2017 Alan Broadbent and Franca Gucciardi

www.youreit.ca

Introduction

Franca: In 2004, I received a phone call from the Loran Scholars Foundation asking me to consider the role of CEO. When it came, I thought that everything I had done to that point had prepared me to say yes. But then came the questions. Was I ready to take on this first major CEO role? Was I too young? I was only thirty-three, at least fifteen years younger than the person in the position. Was the Loran Scholars Foundation the right organization for my first CEO role?

At the time of the call, I was director of the Millennium Excellence Awards, a federally funded program I had helped to design and implement. I knew how to manage people, both volunteers and paid staff, oversee large budgets, and develop business plans, processes, and work flows. In short, I had experience in managing large undertakings successfully, but I wondered if this was enough to take on the leadership of an organization. After all, I had never had financial responsibility for an organization. I called a few of my mentors. That was when I called Alan and asked, "How do you know when you are ready?"

I did take on the position. Just weeks into the job, I realized the immense task ahead of me, and I went to see Alan. Unlike others around the organization who had no qualms about telling me exactly what I should do, my conversations with Alan were different. He was never directive. He simply listened and had a knack for asking me just the question I needed to contemplate at the time. He became my trusted advisor, and I began meeting with him every few months as I thought through the different stages of my work.

Alan: I remember those first meetings. I knew Franca from my involvement as a member of the Loran board, and as its first non-executive chair, a position I took over from Loran founder, Bob Cluett. I'd been close to the organization through its governance, and also because its Toronto office was, for several years, across the hall from our Maytree and Avana Capital offices.

The meetings with Franca were very interesting for me because I could see her growing into her leadership. As a former Loran scholar, she had the basic attributes we looked for in our selection process: leadership, character, and community engagement. Typical of Loran scholars, these skills were raw materials with the potential to be refined into higher-level skills.

From the leadership work we've done at Maytree, I knew that leaders could be made. There may be some "born leaders," but most good leaders have picked up the skills through experience and over time. At Maytree we've always liked the idea of collapsing time frames, so that what might naturally happen in ten years can happen in three, or even two. This can be achieved through teaching and mentorship, and by focusing on the necessary skill sets.

Good leaders need some basics: an ability to think through issues to solutions and not be paralyzed by complexity; flexibility and a high tolerance for ambiguity; and what I've always called bravery, a willingness to take responsibility and be accountable.

Ultimately, a good leader has to come up with the right answers. Answers are important. But the road to good answers runs through the right questions. Over the years, as I've worked with developing leaders, knowing what questions to ask is often most useful. These are questions that lead to good answers and prevent wallowing in inquiry.

This is how my conversations with Franca developed. I knew she had the basics. What we did was figure out what the questions were. I'd listen to her describe the issues and problems she was facing, and together we'd reframe them as questions she needed to answer.

Was it tempting to answer those questions for her? It certainly was. But I think that an answer to a question, or a solution to a problem, is more durable when we have to do the work ourselves, thinking our way through it and designing how we might implement the solution. The process gives us more ownership of the solution and a deeper understanding.

Franca and Alan: After a few years, we recognized that our conversations would be useful to anyone facing a first-time role as CEO. We know there are numerous books on leadership and management, but these can be a bit overwhelming for someone new to leading an organization. Simply put, you need time or experience to be able to read through some of them. Also, new CEOs of charities are often at odds to figure how many of the texts relate to the non-profit sector. This book is less about providing detailed expertise on a specific topic and more about supporting someone new to the role in taking full responsibility for it. It's why we called the book *You're It!* We want it to help a CEO get out of the weeds and think strategically about every aspect of the organization she leads, which is a challenging task at the best of times. We also want the book to help a new CEO make the mental shift to being in charge. This is critical. For someone who has been reporting to a CEO, it can be a significant leap to become one. The truth is that those who make the leap quickly are more likely to be successful: much of the learning is in the doing.

You're It! takes you through the life cycle of being a CEO. It has four sections. The first is about getting ready: deciding whether you're prepared to step into the role; deciphering if the organization is the right choice for you; and using those first few months on the job to set clear plans for yourself and your organization. The second section is about getting the team or the people needed to advance the work. A CEO must take an active role in recruiting and attracting outstanding individuals at all levels, setting the culture and building the support mechanisms that ensure the organization has the skills and commitment necessary to achieve its mission.

The third section deals more concretely with the day-to-day work, from raising and managing money to raising awareness and surrounding the organization with advocates and friends. This is the nitty-gritty that separates mediocre organizations from well-managed ones. The fourth section addresses the difficult question of when it's time to leave the role and take on the next challenge. Someone just starting out may not see the need to read this section. Although it is not something to worry about during the first few months, it will be useful to read it early and remember that the job requires you to leave an organization in better shape than when you started. You are there to guide and steward the organization so that it has a life beyond any one leader.

We did not write *You're It!* with the intention that it be read in one sitting, necessarily. Just as our own conversations have evolved through the years, the book is meant as a companion to be referred to over time. We hope it provides accessible and practical advice that you will adapt to suit your needs, and that will, in turn, translate to your achieving your goals and those of your organization. We also hope it serves as a friendly reminder of the importance of your leadership role. A committed, effective leader of integrity can make a huge difference to improving the impact an organization has, and thus an impact on the health and well-being of our society.

So remember *You're It!* and get to work.