



New Executive Director Tip Sheet

COA has created a tip sheet to assist recently hired Executive Directors with the management and oversight of their new organisation. We recognize that becoming a new Executive Director presents an opportunity to review and revamp the current systems within an organisation in order to maximize its strength. At the same time, we understand the challenges associated with becoming a new Executive Director in the context of an organisation's infrastructure. As a result, we have identified some areas within our standards that may assist new Executive Directors during this time of change.

The following is a list of organisational operations that should be addressed upon becoming a new Executive Director:

- 🏛️ Ensuring financial stability
- 🏛️ Recruiting and retaining qualified staff
- 🏛️ Monitoring the organisation's foreseeable risks
- 🏛️ Reviewing the organisation's strengths and weaknesses
- 🏛️ Monitoring the ethics of the organisation

The following is a list of standards that should be reviewed during a change in leadership:

CA-ETH 1 Transparent Operations	CA-GOV 6 Governance Responsibilities
CA-ETH 2 Conflict of Interest	CA-GOV 7 Oversight of Investments
CA-ETH 3 Fundraising	CA-GOV 8 Executive Director
CA-ETH 5 Professional Conduct	CA-HR 1 Work Environment
CP-AM 2 Agency Leadership	CA-HR 2 Human Resources Planning
CO-AM 5 Agency Oversight and Community Representation	CA-HR 3 Recruitment, Selection, and Deployment
CP-AM 6 Organisation of the Agency's Administrative Team	CA-HR 4 Satisfaction and Retention
CP-AM 7 Administrative Responsibilities	CA-PQI 1 Leadership Endorsement of Quality Performance Values
CA-FIN2 Internal Control Environment	CA-PQI 5 Use and Communication of Quality Information to Make Improvement
CP-FIN 1 Internal Control Environment	CA-RPM 2 Risk Prevention
CA-FIN 3 Financial Risk Assessment	CA-RPM 4 Insurance Protection
CP-FIN 2 – Financial Risk Assessment	CA-RPM 9 Contract and Service Agreement
CA-FIN 4 Stable Predictable Revenue	CA-CR Clients Rights
CA-FIN 5 Financial Planning	CA-BSM 1 Philosophy and Organisation Policy
CP-FIN 3 Financial Planning	CA-TS 2 Training Content
CA-FIN 7 Financial Management System	

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