



THE CHARITY CFO

Client Impact Story

CLIENT SUCCESS STORY:

ADOPTION OPTIONS

INTERVIEWEE:

Megan McLean, Executive Director

ADOPTION OPTION Building Financial Confidence After Disruption

The Challenge



When Megan McLean stepped into leadership at Adoption Options, the organization was grappling with the aftermath of turnover and an accounting breakdown. As a result, most of Megan's time was consumed with finances.

With limited internal resources and increasingly complex financial needs—from county and government contracts to managing multiple grants—the organization needed high-level expertise. But hiring a full-time finance lead wasn't financially feasible.

On top of that, the systems in place were outdated and manual. Reporting wasn't clear or consistent. "We were realizing just how complex our financials really were—and how urgently we needed someone who truly understood nonprofit finance," Megan shared.

The Solution



The Charity CFO stepped in to bring structure, strategy, and stability to the organization's financial operations.

Right-fit expertise at the right cost.

Referred by a board member who had worked with TCCFO before, Megan found a partner who could deliver the high-level knowledge Adoption Options needed—without the cost of a full-time hire.

Process design + audit readiness.

From day one, the TCCFO team helped implement consistent, auditable processes. **"We needed to pass audits and report clearly to funders—and now it's much smoother,"** Megan said.

True understanding of the mission.

Josh and Theresa took the time to deeply understand the organization's work, goals, and funding structures. **"They didn't just do the books—they became part of the team."**

Transparency, responsiveness, and accountability.

Megan emphasized that when she had feedback, it was met with openness and follow-through—not defensiveness.

"When something wasn't clear, they asked. When something could be done better, they adapted. That's how trust is built."

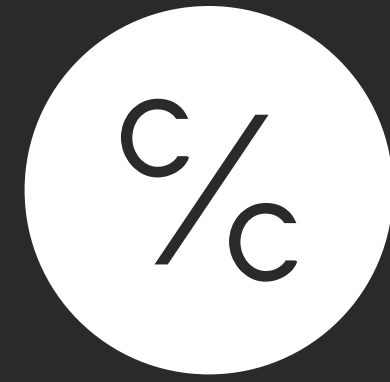
The Impact



- ✔ **Trust in the numbers.**
Megan no longer double-checks every transaction or pulls late nights in QuickBooks. "I feel fully confident in the financials we present to our board and funders."
- ✔ **Processes that serve the mission.**
Beyond compliance, Adoption Options now uses its financial systems to strengthen internal protections, support transparency, and make better decisions.
- ✔ **A collaborative partnership.**
Megan sees TCCFO not as a vendor, but as an extension of her team. "They've earned that place—and it's clear they believe in our mission, too."
- ✔ **The right model for growing organizations.**
"We couldn't afford to hire someone full-time with this level of expertise," Megan said. "But with The Charity CFO, we didn't have to."

Megan's Advice to Other Nonprofit Leaders

"If you want a partner who's responsive, collaborative, and genuinely invested in your success, work with The Charity CFO. Just know—this is a two-way relationship. You've got to show up, give feedback, and be open to the process. If you do that, the results are absolutely worth it."



Stronger Together
