

# SUCCESSION PLANNING FOR NONPROFITS

A Suite of Learning and Consultation Services for Organizations, Consultants & Communities

Presented by Third Sector Company, SPC

## OUR MISSION IS LEADERSHIP CONTINUITY SOLUTIONS FOR COMMUNITY IMPACT ORGANIZATIONS

The commitment that founded Third Sector Company in 2002 remains its mission today: To foster solutions for organizations, systems and communities that create a continuity of professional and voluntary leadership for the nonprofit sector. At the heart of that determination is a mantra to help organizations cultivate the human capital vital to long-term sustainability, provide short-term interim solutions, and advance a culture of succession planning and talent development.

### SUCCESSION PLANNING LEARNING LABS FOR NONPROFITS

#### A Comprehensive Six-Step Approach to Planful Leadership Continuity

Each year Third Sector Company presents online learning labs for individuals and organizations to discover a model for creating do-it-yourself succession plans. A national community of trained instructors present the models and methods that have proven effective for supporting conversations, plans and policies that invite a culture of succession.

- **SUCCESSION PLANNING REIMAGINED: Leadership Continuity to Sustain Your Mission**

Thursday, April 18 – 12:00PM to 1:30PM Pacific (Part One)

Thursday, April 25 – 12:00PM to 1:30PM Pacific (Part Two)

*Proudly Offered in Alliance with Nonprofit Association of Washington (NAWA)*

The cost is \$120 per session (\$60 for NAWA Members)

Register in the Events Calendar at the NAWA Website at [www.nonprofitwa.org](http://www.nonprofitwa.org).

- **BOARD CHAIRS ACADEMY LEARNING LAB: Leadership Succession Planning**

Friday, October 11 – 8:00AM to 10:30AM Pacific

The cost is \$95 per session, or organizations may register up to four participants for \$295 with additional participants from the same organization at \$50 per person.

### SUCCESSION PLANNING BOOTCAMP FOR CONSULTANTS TO NONPROFITS

#### Advancing a National Standard for Succession Planning for Nonprofits

There are significant variations in definitions and approaches to succession planning in the marketplace today. Third Sector Company aspires to present a standard for cultivating leadership continuity and talent development in nonprofit organizations. Consultants throughout the United States and Canada are invited to a two-day learning experience to study models and methodologies to facilitate and write quality succession plans for community causes.



#### SUCCESSION PLANNING BOOTCAMP – The Online Experience

Monday and Tuesday, October 7 and 8 – 8:30AM to 12:00PM Pacific Each Day

#### SUCCESSION PLANNING BOOTCAMP – The InPerson Experience

Offered in Partnership with Community Foundations, United Ways, and State Nonprofit Associations seeking a local pool of succession planning consultants to be of service to their grantees and members.

#### Succession Planning Consultant Study Groups

As a continuing education opportunity for graduates of Succession Planning BootCamp, Third Sector Company offers study groups with topical discussions on subjects directly tied to the advancement and practice of succession planning for nonprofit organizations.

Thursday, August 8 – 8:00AM to 10:00AM Pacific (Succession in Founder Organizations)

Thursday, December 5 – 8:00AM to 10:00AM Pacific (Board Succession)

The cost is \$395 per BootCamp plus the cost of a consultant's manual. Graduates of the BootCamp receive a certificate of completion and a badge indicating completion of Succession Planning training.

## ON-SITE SUCCESSION PLANNING TRAINING FOR YOUR ORGANIZATION

### We Can Bring our Succession Planning Classroom to You

Third Sector Company can work with your organization to create an exclusive half-day training or full-day retreat focused on succession planning for your organization. The training portion includes all the models and methodologies taught in our learning labs and BootCamps. A retreat environment can be created for extensive conversation about application of the models to your organization as well as begin to write the content of a succession plan that you would complete following the experience.

The cost is \$2000 per half-day training module (up to four hours)  
or \$3600 (up to eight hours) for an entire day of training and facilitated discussion using a team of two trainers.  
Preapproved duplication of materials, travel, and event costs would be an additional expense.

## SUCCESSION & TRANSITION PLANNING CONSULTATIONS

### Let Our Graduates Facilitate the Creation of Your Succession or Transition Plan:

Third Sector Company trains consultants to deliver the national standard in succession planning consultation to nonprofit organizations with an expectation that a comprehensive plan will result using a six-phase approach. The succession plan is intended to be a living document that sets the stage for a commitment to discussions about leadership continuity strategies for the organization on an ongoing basis.

- **LEADERSHIP SUCCESSION PLANNING - A Focus on The Entire Organization**  
*An organization succession plan for board approval that includes the results of human resource assessments, a succession training session and retreat, an inventory of vital organizational information, written recommendations for key position vacancies at the board and staff levels, succession policies including search committee composition and charge, recommendations for advancing human resource practices and talent retention, and suggested modifications to the strategic plan aimed at succession.*

The cost is \$8500 to \$9500 for completion of a succession plan for board approval.  
Engagements are generally three- to six-months in length and billed in phases of the succession planning process.

- **EXECUTIVE TRANSITION PLANNING DELIVERABLES – A Focus on a Single Position**  
*A transition plan details a process of how a specific vacancy will be managed in practice and policy, along with a detailed contingency plan. The plan is the result of an assessment process, focused interviews, the drafting of relevant documents, and a facilitated decision-making retreat.*

The cost is \$5000 for an executive transition plan for board approval.  
Engagements are generally three months in length and billed in three monthly installments.

## A PERSONAL SUPPORT PROGRAM FOR RETIRING NONPROFIT EXECUTIVES

### Helping Our Peers Make Tough Decisions About Their Transitions

Third Sector Company welcomes Eos Transition Partners into our Professional Services Network as a specialist in helping career nonprofit professionals to plan and prepare for their eventual transition. Learn more about their "Thresholds Program" which includes training, peer support, and private consultation opportunities at [www.eostransitions.com](http://www.eostransitions.com)

For Online Registration for any of the more than 80 training sessions offered per year:  
Visit us at [www.thirdsectorcompany.com](http://www.thirdsectorcompany.com) or [www.interimexecutivesacademy.com](http://www.interimexecutivesacademy.com)  
For More Information e-mail us at [concierge@thirdsectorcompany.com](mailto:concierge@thirdsectorcompany.com)



Interim Executive Recruitment, Training, Placement and Support  
Succession Planning BootCamp and Consultants Network  
Interim Executives Academy – Board Chairs Academy  
Interim Development Director BootCamp  
The National Professional Services Network for Nonprofits in Transition