

CO3 Strategic Plan 2019 - 2022

To Inspire, Develop and
Connect Third Sector Leaders.

Strategic Plan Summary

2019 - 2022



mission

To inspire, develop and connect third sector leaders.



vision

An inclusive, participative and vibrant society where third sector leaders deliver outstanding impact.



values

Mutuality | Quality | Inclusion | Integrity

Aims and Priorities for 2019 - 2022

1. **Develop leaders** | Build the leadership capacity of individuals in third sector organisations.
2. **Connect leaders** | Connect third sector leaders to each other and other sectors.
3. **Recruit and select the best leaders** | Support third sector organisations to get the best people into leadership roles.
4. **Improve third sector governance** | Support the improvement in third sector governance and leadership capacity of trustees.
5. **Promote CO3 and the voice of third sector leaders** | Promote CO3 & provide opportunities for the voices of third sector leaders to be heard.
6. **Promote and build membership** | Expand, develop and engage CO3 membership.
7. **Manage human resources** | Ensure CO3 has the staff and other personnel required to achieve its aims and objectives
8. **Physical and financial resources** | Ensure CO3 has the premises and other physical resources required to achieve its aims and objectives.
9. **Promote good governance** | Ensure CO3 demonstrates best practice in its governance.

CO3'S TOP ACHIEVEMENTS OF 2018-19...



CO3 Leadership Conference & Awards

With over 550 registered for the Leadership Conference & Awards, our flagship annual event continues to be one of the most exciting, engaging and inspirational Third Sector occasions of the year.

Executive Recruitment Service

In 2018-19 we placed 15 Executive Recruitment opportunities across a variety of CEO, Director, and Trustee roles. We also placed a variety of Interim CEOs into organisations that needed temporary leadership support.



A growth in membership to over 850

We have a growing membership base of over 850 Third Sector leaders. Our members range from leaders of some of the largest charities and social enterprises through to small community and faith-based groups.



Increased Number of Events & Training

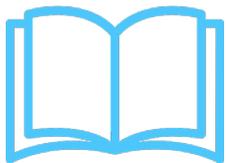
Increased opportunities for members through the growth in the number and range of events, including successful and popular leadership training, development, networking and mentoring programmes.



97 events with
2113 delegates

Launch of the CO3 Guide to Great Governance

The guide, written by Dr Roger Courtney, aims to provide organisations with the principles, behaviours and guidelines of what great governance looks like. Thank you to Cleaver Fulton Rankin for sponsoring the guide.



Continuation & Creation of New Sub Groups

- Share & Connect CEO Series NEW!
- New to Post CEO Series NEW!
- HR Network
- Finance Network
- Marketing & Comms Network
- Chairs' Forum
- Treasurers' Forum
- Health Special Interest Group



CO3 STRATEGIC PLAN 2019 - 2022

INTRODUCTION



CO3 has grown from an informal network of leaders in 1985 to a thriving community of Third Sector leaders with 800+ members. We are a mature and strategic organisation that pioneer leadership development in the Third Sector.

The sector is wide and diverse, the breadth and depth of the sector is balanced with the challenge that such variety brings; different models, organisational structures and governance arrangements that operate within it. The corollary of this is that such a varied and dynamic sector must be matched with varied and dynamic leadership. Our challenge within CO3 is to respond with a diverse range of services that supports leadership development at Board, CEO and Senior Management level.

Against the backdrop of a turbulent and uncertain world, we must embrace that uncertainty together with our members, we have to progress into uncertainty with adaptability, responsiveness and learning along the way. Constructive discontent is our constant companion. There is always more to do, and more to explore.

We pride ourselves on being membership led, with a membership structure that focusses on the individual leader, our three year Strategic Plan sets out our ambitions to continue to build, develop and inspire Third Sector leadership.

Andrew McCracken, Chair, CO3

A handwritten signature in black ink, appearing to read 'Andrew McCracken', written over a light grey rectangular background.

MISSION

To inspire, develop and connect third sector leaders.

VISION

An inclusive, participative and vibrant society where third sector leaders deliver outstanding impact.

VALUES

The following values will inspire all aspects of CO3's work:

MUTUALITY

CO3 is its members. We will optimise opportunities for mutual support, collaboration and the sharing of skills and knowledge.

QUALITY

All those involved in third sector leadership deserve to receive services of the highest quality that meet their needs. We will regularly assess the needs and satisfaction of members and ensure that all CO3 services are responsive and of the highest quality.

INCLUSION

Everyone has the right to be valued equally and be included in society. We will work to identify and remove barriers to accessibility and inclusion.

INTEGRITY

Trust depends on consistently acting honestly, independently, transparently and in good faith. We are committed to living out our values and ideals and doing what we say we will.

AIMS FOR 2019-2022

DEVELOP LEADERS

Aim 1: Build the leadership capacity of individuals in third sector organisations.

CONNECT LEADERS

Aim 2: Connect third sector leaders to each other and other sectors.

RECRUIT AND SELECT THE BEST LEADERS

Aim 3: Support third sector organisations to get the best people into leadership roles.

IMPROVE THIRD SECTOR GOVERNANCE

Aim 4: Support the improvement in third sector governance and leadership capacity of trustees.

PROMOTE CO3 AND THE VOICE OF THIRD SECTOR LEADERS

Aim 5: Promote CO3 and provide opportunities for the voices of third sector leaders to be heard.

PROMOTE AND BUILD MEMBERSHIP

Aim 6: Expand, develop and engage CO3 membership.

MANAGE HUMAN RESOURCES

Aim 7: Ensure CO3 has the staff and other personnel required to achieve its aims and objectives and they are effectively supported and managed.

PHYSICAL AND FINANCIAL RESOURCES

Aim 8: Ensure CO3 has the premises and other physical resources required to achieve its aims and objectives.

PROMOTE GOOD GOVERNANCE

Aim 9: Ensure CO3 demonstrates best practice in its governance.

PRIORITIES FOR 2019-2022

DEVELOP LEADERS

Aim 1: Build the leadership capacity of individuals in third sector organisations.

Priorities for 2019-2022:

- Regularly carry out a training needs analysis of third sector leaders.
- Recognise excellent leadership through the Leadership Awards.
- Showcasing excellent leadership by utilising the skills and strengths among our membership
- Develop, deliver and evaluate CO3's leadership training programmes and resources at various levels.
- Deliver and evaluate CO3's mentoring programme.
- Support third sector leaders to assess and improve the capacity of their organisations through quality/organisational assessment frameworks.

CONNECT LEADERS

Aim 2: Connect third sector leaders to each other and other sectors.

Priorities for 2019-2022:

- Provide third sector leaders with the opportunity to network with, and support, each other.
- Provide third sector leaders with the opportunity to network with leaders from other sectors and countries.
- Develop collaboration and partnerships with other similar organisations in Britain and Ireland.
- Develop collaboration and partnerships with organisations in the private and public sectors.

RECRUIT AND SELECT THE BEST LEADERS

Aim 3: Support third sector organisations to get the best people into leadership roles.

Priorities for 2019-2022:

- Expand and develop CO3's Executive Recruitment service.
- Expand and develop CO3's Interim Executive service.
- Expand and develop CO3's Trustee recruitment service.

IMPROVE THIRD SECTOR GOVERNANCE

Aim 4: Support the improvement in third sector governance and leadership capacity of trustees.

Priorities for 2019-2022:

- Develop the governance and leadership skills and knowledge of trustees/directors.
- Expand and develop the Trustee Network.
- Develop the Chairs' and Treasurers' fora.

PROMOTE CO3 AND THE VOICE OF THIRD SECTOR LEADERS

Aim 5: Promote CO3 and provide opportunities for the voices of third sector leaders to be heard.

Priorities for 2019-2022:

- Promote public awareness of CO3 as the leadership support and development organisation for the third sector.
- Increase awareness of CO3 in political circles.
- Ensure CO3 communicates effectively with other relevant stakeholders.
- Ensure CO3 has robust and reliable ICT systems.
- Ensure effective internal communication.
- Provide opportunities for third sector leaders to engage in dialogue with senior decision-makers and influencers.
- Highlight the value of, and challenges faced by, third sector leaders.
- Represent third sector leaders in relation to leadership development.

PROMOTE AND BUILD MEMBERSHIP

Aim 6: Expand, develop and engage CO3 membership.

Priorities for 2019-22:

- Expand CO3 membership through recruiting new members and retaining existing members.
- Ensure an effective membership structure.
- Regularly assess member needs, views and satisfaction, in order to inform the development of services and member benefits.
- Develop attractive membership benefits.
- Provide support and care to third sector leaders.
- Provide members with distinctive, accurate, timely and relevant information, through the most effective methods.

MANAGE HUMAN RESOURCES

Aim 7: Ensure CO3 has the staff and other personnel required to achieve its aims and objectives and they are effectively supported and managed.

Priorities for 2019-2022:

- Ensure CO3 has the staff complement and structure to deliver its strategic and operational plans.
- Ensure staff are effectively managed, supported and appraised.
- Ensure the learning needs of staff are effectively assessed and addressed.
- Ensure CO3 has the terms & conditions of employment to attract and retain staff.

PHYSICAL AND FINANCIAL RESOURCES

Aim 8: Ensure CO3 has the premises and other physical resources required to achieve its aims and objectives.

Priorities for 2019-2022:

- Ensure CO3 has the premises to operate from.
- Ensure CO3 has the physical resources to achieve its plans and they are well managed.
- Ensure CO3 generates funding to achieve its plans.
- Increase sustainable net income from social enterprise trading.
- Increase income from trusts and foundations.
- Ensure sound financial planning, management and reporting.

PROMOTE GOOD GOVERNANCE

Aim 9: Ensure CO3 demonstrates best practice in its governance.

Priorities for 2019-2022:

- Ensure best practice governance structure and skills.
- Regularly review the governance of CO3 and draw up, implement and review a governance improvement plan.
- Develop and monitor annual operational plans.
- Effectively manage risk.
- Effectively manage and support the CEO.
- Ensure compliance with CO3's legal requirements.
- Measure and report on CO3's quality, performance and impact.