



Chief Officers 3rd Sector

STRATEGIC PLAN 2022-2025



CONTENTS

03	FOREWORD FROM THE CHAIR
04	WELCOME FROM OUR CHIEF EXECUTIVE
06	ABOUT CO3
09	INTRODUCTION
11	VISION, MISSION & VALUES
16	LONG-TERM AIMS
20	PRIORITIES FOR 2022-2025
30	ORGANISATIONAL CHART



FOREWORD FROM THE CHAIR

It is my privilege to be Chair of CO3 an organisation dedicated to developing world class leadership capabilities in Northern Ireland's third sector.

To develop our Strategic Plan for 2022-25 we engaged in member research, a series of workshops with the CO3 staff team and board and analysed the current political and societal landscape.

Clearly it has been a challenging period for Northern Ireland's community & voluntary organisations and social enterprises. Covid brought fundraising to a halt creating financial challenges for many organisations at a time when demand for services was rising sharply.

Ongoing political uncertainty in Northern Ireland coupled with the effect of Brexit in ending European funding support for our sector has thrown up more complex challenges for leaders of charities and social enterprises.

The need for support, development and connection for our chief executives, senior managers and trustees has never been greater and CO3 is ready to rise to that challenge.

With a range of training, peer to peer support and cross sectoral learning opportunities, we are committed to developing the finest leaders for the sector.

The challenge of finding and retaining talent has never been greater and through our social enterprise Engage Executive Talent we support members in selecting the top candidates to lead and develop their organisations.

We hope that you, our stakeholders, find this strategic plan informative and that we continue to enjoy your support in the coming years as we develop leadership excellence in charities and social enterprises across Northern Ireland.

ANNE- MARIE MCCLURE
CHAIR, CO3



WELCOME FROM OUR CHIEF EXECUTIVE

Welcome to the CO3 - Chief Officers Third Sector - Strategic Plan for 2022-25.

CO3 is a leading membership organisation representing chief officers, senior managers and trustees of community & voluntary organisations and social enterprises across Northern Ireland.

With over 700 members we are the voice of the sector's leaders and represent the views of our members to policy makers at all political levels. We advocate for the sector, highlighting its vital role in delivering much needed services to communities across Northern Ireland. Through policy round tables, meetings with MLAs, Departmental Committees, Ministers and the NIO, we promote the value of the third sector to positively influence policy decisions.

CO3 provides a wide range of leadership development programmes designed to build leadership capacity in third sector organisations and to enhance skills and expertise.

Our programmes facilitate peer learning opportunities for members and provide space in which to share experiences and explore effective solutions. We offer support to organisations in succession planning, management development, CEO coaching and mentoring, building financial resilience and cross sectoral learning opportunities.

In 2021 we delivered over 70 networking and training events, a two-day virtual conference, and the highly successful CO3 Leadership Awards.

We successfully match 35 members each year with experienced mentors and we are dedicated to supporting third sector leaders throughout the leadership journey.

We run Northern Ireland's Trustee Network offering the trustees, honorary office holders and chairs of charities and social enterprises, training, development and networking opportunities. With unrivalled expertise in governance our services to trustees include training events, advice and the recently published Guide to Great Governance - a go to publication for all community & voluntary organisations and social enterprises.

Our social enterprise, Engage Executive Talent provides a uniquely tailored search and selection service to members seeking chief executives, senior managers and trustees. With unsurpassed knowledge of the sector and a wide network in public, private and third sector organisations, Engage Executive Talent consistently delivers the best candidates.

As we look to the next three years, CO3 has significant ambitions to continue to grow, increase membership, promote the value of the work of our members to policy makers and to consistently deliver excellent services to the leaders of our sector.

VALERIE MCCONVILLE
CHIEF EXECUTIVE, CO3



ABOUT CO³

CO3 Chief Officers 3rd Sector is a membership organisation for Third Sector leaders in Northern Ireland.

DELIVERING FOR OUR MEMBERS



Develop Leaders

- Training & Development
- Mentoring
- Skill Development
- Capacity Building
- Succession Planning



Connect Leaders

- Networking Events
- Peer to Peer Connections
- Leadership Conference
- Leadership Awards



Influence Policy

- Campaigning Advocacy
- Representation
- Public Affairs
- Special Interest Groups



Support Great Governance

- Trustee Network NI
- Board Training
- Governance Support
- Training for Chairs and Honorary office holders



CEO Support

- Interim Support
- Consultancy Support
- New to post CEO support
- Crisis support
- Briefings, publications & reports

ABOUT CO³

Established in 1985, Chief Officers 3rd Sector (CO3) is a leading membership-based organisation that focuses on supporting, developing and connecting Third Sector leaders in Northern Ireland.

We have a growing membership base and members ranging from leaders of some of the largest charities and social enterprises through to small community and faith-based groups.

We use the term third sector to describe the breadth of our members' work. Members work across all policy areas and connect to all government departments. Our members offer considerable expertise, services and innovation. Our members lead organisations that contribute resources and investment in public services, employ tens of thousands of people and have a considerable asset base to help strengthen the economy.

We work closely with members, as well as partner organisations in the private & statutory sector and government departments. CO3's capacity to

deliver services has been enhanced in recent years. Membership numbers have increased substantially, from 60 in 1998 to more than 700 by the beginning of 2022.

CO3 receives funding from a range of sources, membership fees, training, a small proportion of government funding, and income from a number of Trusts and Foundations.

Full membership is open to chief officers (the most senior staff member) of third sector organisations in Northern Ireland. Other categories of membership are open to third sector senior managers (associate members) and to board members through our Trustee Network. We also offer Corporate Memberships and partnership opportunities to colleagues in the private sector.

Full members are entitled to vote at the AGM and elect Executive Committee members. CO3 Executive Committee meets five times annually, and has established a Finance, Audit and Risk Sub Committee and an Honorary Officers Committee.

OUR HISTORY

With a rich history spanning almost 40 years, CO3 was formed in 1985 as the Association of Senior Officers of Voluntary Organisations (ASOVO), by a group of chief officers who started meeting to share good practice, information and peer support, to help them be more effective.

We then became the Association of Chief Officers of Voluntary Organisations (ACOVO) in 1986 and developed the organisation to provide support and development to chief officers in Northern Ireland's voluntary and community sector. In May 2007 ACOVO was renamed CO3 Chief Officers 3rd Sector.





INTRO^ODUCTION



INTRO^{DU}CTION

This strategic plan has been developed at one of the most significant periods in recent human history when the world has been ravaged by a global pandemic. Few things have highlighted the depth of human needs, the inter-dependence of us as human beings, and the need for an effective response to those in need. It has also shown the commitment, resilience, and agility of the third sector (charities, voluntary and community organisations and social enterprises) to respond to those who need them.

Slowly coming out of a long period of social restrictions presents a whole range of new challenges for third sector organisations, particularly in the context of tightened public finances. But it also presents opportunities to use some of the learning from responding to the pandemic to apply to future development of the sector, particularly in terms of digital capabilities.

Northern Ireland is also facing a range of its own challenges following the departure from the EU, which played such an important role in funding peace, reconciliation and other work in our communities. Twenty-three years after the Good Friday Agreement true reconciliation seems as far away as ever and political instability threatens even the basic governance of Northern Ireland and the development of positive policies and strategies that support the work of third sector organisations with people in need.

As compliance requirements to manage an organisation effectively have continued to increase and become more and more complex, the role of leadership in the third sector has never been more challenging requiring higher and higher levels of skill and knowledge. It reinforces the importance of the role of CO3 in building leadership skills in the third sector, facilitating mutual support within the sector and collaboration with other sectors, and providing a voice for these dedicated leaders.

CO3 membership provides invaluable support for 3rd Sector leaders in NI, it offers a unique focus on issues affecting charities. The CO3 team recognise the breadth of responsibilities and pressure leaders are under so they provide a distinctive safe space for support, networking and advice. CO3 events are relevant and informative whilst enabling CEOs to engage with key decision makers; their awards events afford recognition of the exceptional talent in the sector. They also acknowledge the important leadership role of trustees and CO3 support enables them to network and develop better governance.

**DAVID BABINGTON, CHIEF EXECUTIVE,
ACTION MENTAL HEALTH**

INTRODUCTION

Over the past five years, CO3, with only a small staff team, can be proud of a wide range of achievements including:

- The establishment and development of an impressive social enterprise (Engage Executive Talent) helping organisations to recruit leaders, paid and unpaid, permanent and temporary.
- The development of an impressive portfolio of leadership training and development programmes.
- The creation of an inspirational annual conference with outstanding international speakers.
- The development of mentoring programmes to support third sector leaders.
- Pioneering a confidential dialogue with senior decision-makers in the public sector.
- The development of powerful collaborations with our private and public sector colleagues in helping support the development of third sector leaders.
- Effectively represented third sector leaders during a period of great crisis under Covid restrictions.

I have been a member of CO3 for nearly 14 years, and throughout this time I have found the support invaluable. CO3 has the ability to open doors for the sector and does it in a way that is inclusive. For a small organisation the reach of the team is really significant, bringing leaders together to network, reflect, learn and grow. CO3 is a values led organisation, focusing on building the resilience of leaders in the sector and ensuring we have a strong and vibrant third sector, making a central contribution to society in Northern Ireland.

KERRY ANTHONY MBE, CEO, INSPIRE

VISION

...what success looks like

“ A fair and connected society with a vibrant, valued third sector, led by influential leaders, delivering outstanding impact. ”

3





3

MISSION

...we will achieve our vision by

“ *Developing inspirational,
innovative and highly skilled
third sector leaders.* ”



VALUES

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

VALUES



Courage

We are ambitious for our members and the sector at large. We will speak truth to power, providing an independent voice and a range of services to respond to our members' needs.



Empowering Leadership

Leading a third sector organisation requires the highest level of dynamic, innovative, skilled and influential leaders. Everyone in an organisation has a leadership role to play and can make an impact. The best leaders are those that build leadership capabilities in others. We will show empowering leadership and help build this kind of leadership throughout the sector.



Unity

Social problems are not resolved by third sector organisations acting on their own but by collaborating with other organisations and sectors. Third sector leaders are also more effective and resilient when they collaborate and provide mutual support. We will optimise opportunities for mutual support, collaboration and the sharing of skills and knowledge.



Quality

As the beneficiaries of third sector organisations have the right to expect excellent services to meet their needs, those involved in third sector leadership should expect to receive services of the highest quality that meet their needs. We will be member-led, regularly assess the needs and satisfaction of members and ensure that all CO3 services are responsive and of the highest quality.



Social Justice

Everyone has the right to be valued equally, treated fairly and be included in society. We acknowledge the need to explore, expand and learn about diversity. We will celebrate and harness the value of difference, and work to identify and positively influence change in removing barriers to accessibility and inclusion.



Integrity

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

The background is a grayscale photograph of a group of people in a meeting or conference room. They are seated at tables, looking at documents or laptops. A large, bright blue circle is superimposed over the left and center of the image. The text 'LONG-TERM AIMS' is centered within this circle. The word 'LONG' is in white, 'TERM' is in white, and 'AIMS' is in white. The letter 'O' in 'LONG' is a solid blue circle. In the top right corner, there is a large blue number '3'. In the bottom right corner, there is a blue curved line segment.

LONG-TERM AIMS

3



STRATEGIC THEME 1:

Build and connect third sector leaders



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.

IMPROVE THIRD SECTOR GOVERNANCE

Aim 3: Support improvement in third sector governance and the leadership capacity of trustees.

PROMOTE AND BUILD MEMBERSHIP

Aim 4: Expand, develop and engage CO3 membership.



STRATEGIC THEME 2:

**Effectively
communicate with
CO3's stakeholders
and influence public
policy and practice**

3



COMMUNICATIONS

Aim 5: Promote awareness of CO3 and ensure effective communication with internal and external stakeholders.

CONTRIBUTE TO THE DEVELOPMENT OF PUBLIC POLICY

Aim 6: Make a positive impact on the development of relevant public policy and practice in collaboration with members.



STRATEGIC THEME 3:

Build a strong effective organisation

3

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 financial resources, premises and other physical resources required to achieve its aims and objectives.

PROMOTE GOOD GOVERNANCE

Aim 9: Ensure CO3 role-models best practice in its governance.



PRIORITIES

FOR 2022 - 2025

STRATEGIC THEME 1: Build and connect third sector leaders

DEVELOP LEADERS

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

PRIORITIES FOR 2022-2025:

- Regularly assess the learning needs of third sector leaders.
- Recognise excellent leadership to inspire other leaders.
- Enable third sector leaders to have access to leadership development.
- Enable third sector leaders to have access to relevant mentoring.
- Build skills in financial and commercial awareness.
- Develop and market digital learning resources for third sector leaders.
- Support third sector leaders to assess and improve the capacity of their organisations.
- Promote succession planning in the sector and develop the leadership capacity of managers, below the level of chief officer, in the sector.

STRATEGIC THEME 1: Build and connect third sector leaders

CONNECT LEADERS

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

PRIORITIES FOR 2022-2025:

- 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 collaborations and partnerships with other infrastructure organisations in NI.
- Develop collaborations and partnerships with other similar organisations in Britain and Ireland.
- Develop collaborations and partnerships with organisations in the private and public sectors.

STRATEGIC THEME 1: Build and connect third sector leaders

IMPROVE THIRD SECTOR GOVERNANCE

Aim 3: Support improvement in third sector governance and the leadership capacity of trustees/directors.

PRIORITIES FOR 2022-2025:

- Develop the governance and leadership skills and knowledge of trustees/directors.
- Develop governance resources for the sector.
- Expand and develop the Trustee Network.
- Support new-to-post trustees.
- Promote and support succession planning.
- Build risk management skills in the sector.
- Develop collaborations and partnerships with organisations in the private and public sectors.
- Promote effective data management systems and protection against cyber risks.
- Provide trustees and office-bearers with opportunities for mutual support.
- Innovate and develop new governance initiatives for board members.

STRATEGIC THEME 1: Build and connect third sector leaders

PROMOTE AND BUILD MEMBERSHIP

Aim 4: Expand, develop and engage CO3 membership.

PRIORITIES FOR 2022-2025:

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



STRATEGIC THEME 2: Effectively communicate with CO3's stakeholders and influence public policy and practice

COMMUNICATIONS

Aim 5: Promote awareness of CO3 and ensure effective communication with internal and external stakeholders.

PRIORITIES FOR 2022-2025:

- Develop, implement and review a communications strategy.
- Promote awareness of CO3 as the leadership support and development organisation for the third sector.
- Ensure CO3 communicates effectively with other relevant stakeholders.
- Effectively market CO3 services.
- Ensure CO3 has robust and reliable ICT systems.
- Innovate communications using digital technologies.
- Ensure effective internal communication.



STRATEGIC THEME 2: Effectively communicate with CO3's stakeholders and influence public policy and practice



CONTRIBUTE TO THE DEVELOPMENT OF PUBLIC POLICY

Aim 6: Make a positive impact on the development of relevant public policy and practice in collaboration with members.

PRIORITIES FOR 2022-2025:

- Develop, implement and review CO3's public policy advocacy positions to develop the third sector.
- Represent third sector leaders to the public sector, highlighting the value of, and challenges faced by, third sector leaders.
- Represent third sector leaders to the public sector in relation to leadership development.
- Build strong relationships with senior decision-makers in the public sector providing an independent voice for members
- Provide opportunities for third sector leaders to engage in confidential dialogues with public sector decision-makers
- Support the development of the public policy lobbying and advocacy skills of third sector leaders.

STRATEGIC THEME 3: Build a strong effective organisation

3

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 2022-2025:

- Ensure CO3 has the staff complement and structure to deliver its aims and objectives.
- Ensure CO3 has the terms & conditions of employment, policies and practices to attract and retain staff.
- Ensure staff are effectively managed, supported, engaged and appraised.
- Ensure the learning needs of staff are effectively assessed and addressed.
- Promote effective teamwork.
- Promote the health and wellbeing of staff.



STRATEGIC THEME 3: Build a strong effective organisation

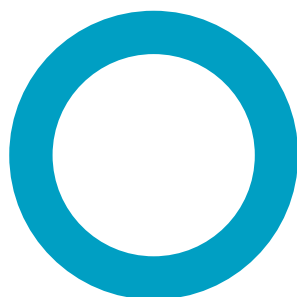
PHYSICAL AND FINANCIAL RESOURCES

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

PRIORITIES FOR 2022-2025:

- Ensure CO3 workplaces are fit for purpose.
- Ensure CO3 has the physical resources to achieve its plans and they are well managed.
- Ensure the long-term financial sustainability of CO3.
- Increase income from membership fees.
- Increase the financial contribution from training, in a way that does not exclude those from smaller or less financially robust organisations.
- Ensure CO3 generates sufficient grant funding, based on full cost recovery, to achieve its plans.
- Increase the contribution to income from tenders that further CO3's strategy and values.
- Ensure sound financial planning, management, monitoring and reporting.
- Achieve CO3's reserves policy.
- Design and deliver an organisation-wide digital technology strategy that enhances the organisation's efficiency and effectiveness and its communications with its stakeholders.

3



STRATEGIC THEME 3: Build a strong effective organisation

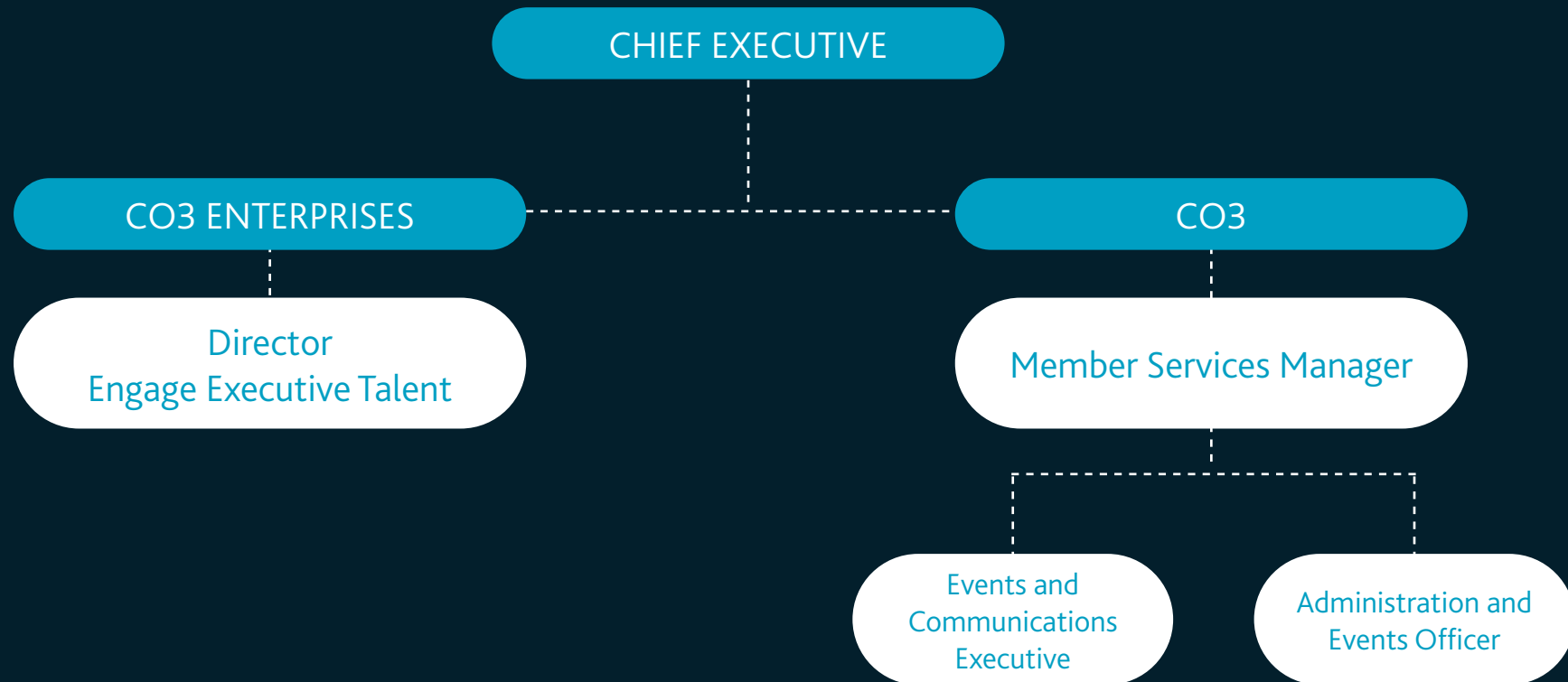
PROMOTE GOOD GOVERNANCE

Aim 9: Ensure CO3 role-models best practice in its governance.

PRIORITIES FOR 2022-2025:

- Ensure best practice in governance structure and skills.
- Ensure the CO3 board members reflect the diversity of the sector.
- 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 (company and charity law; Health & Safety; Safeguarding; GDPR).
- Measure and report on CO3's quality, performance and impact.

ORGANISATIONAL CHART





Chief Officers 3rd Sector

THANK YOU

To learn more about us: www.co3.org.uk

