

next

steps

San Francisco, CA

June 27-28, 2011

Developed with support from the Annie E. Casey Foundation and presented by CompassPoint Nonprofit Services, the Next Steps Workshop helps long-term and founder executives explore the critical and complex issues around succession planning and transition. This intensive, two-day session provides a safe and confidential place to ask difficult questions and explore a variety of organizational and personal issues with peers and consultants. To date, more than 300 founders and long-term executives have benefited from the Next Steps Workshops.

Next Steps workshops are designed for founders or long-term executives of nonprofit organizations planning to leave their position in the next 1-6 years.

They provide:

- Lessons and best practices from 15 years of practice and research in succession planning and leadership transitions.
- An opportunity to hear from and network with executives who are actively involved in leadership succession and/or transition planning.
- Techniques for managing succession and transition in ways that enhance agency capacity...whether departure is 12 months or 6 years away.
- A confidential place to reflect and discuss specific succession and transition concerns with peers and resource consultants.

A Next Steps workshop takes place over two days and includes:

- An overview of succession and transition planning processes;
- Mini working sessions that address tailoring your role through a transition, organizational assessment, succession planning, and building organizational capacity and sustainability.
- Panel presentations including executives who have made successful transitions.
- Small and large group discussions that enable participants to discuss issues related to their particular succession and transition challenges.

Locations:

San Francisco, CA June 27-28, 2011

(Day 1 - 8:30am - 5:30pm) (Day 2 - 8:30am - 4:30pm)

For more information, call (415) 541-9000 or email Sheva Diagne, shevad@compasspoint.org. Register at www.compasspoint.org/nextsteps.

Sponsored by the Annie E. Casey Foundation, Blue Shield of California Foundation.

Costs and Registration: Includes continental breakfasts, lunches & materials.

Early Bird Registration (by May 16, 2011): \$450

Registration (after May 16, 2011): \$525

Cancellation policy: Full refund within 30 days of the workshop, minus a \$25 cancellation fee.

What past participants say about the Next Steps workshop:

“Stepping down from a nonprofit organization that I helped build from the ground up was the hardest thing I ever had to do. Attending the Next Steps Workshop helped me gain perspectives from other founding and long-term directors and gave me ideas of how to continue to help the organization through the executive transition, how to take a step back and let the organization run without my control, and how best to support future efforts.”

Jennifer Feit Korczakowski, Formerly Founding Director, Village Learning Place, Inc., Baltimore MD; now Director of Development for Parents' Choice Foundation

“Nothing lasts forever, not even your labor of love. This Workshop helped me to put this into perspective in an environment with professionals that were nurturing and supportive.”

Robert Jackson, Executive Director, Quitman County Development Organization, Marks, MS

“I haven't yet decided as to the schedule for my leaving but the Next Steps program has been invaluable for helping me take the early and long term steps to prepare EBALDC for my leaving by strengthening our next level of management.”

Lynette Lee, Executive Director, East Bay Asian Local Development Corporation, Oakland, CA

“Being both a long-term executive (31 years) and a founder, I found the Next Steps Workshop very helpful... For me, “taking care of myself” and focusing on where I was helped me to then focus on the process and challenges. [After the workshop] I was able to help two executives in my local community who were “blocking” on dealing with the dynamics involved.”

Robert McMahon, Founding Executive Director, St. Christopher O'tillie, Glen Cove, NY

“The Next Steps workshop was a transformational and life-altering experience for me. As a result of this workshop, I requested & got a 2-1/2 month paid sabbatical. And I reconfirmed that I have many productive years left here. I am much better prepared for my eventual decision to retire.”

Esther Newman, Executive Director, Leadership Montgomery, MD

Next Steps Workshop for Founders & Long-Term Executive Directors

CompassPoint Nonprofit Services
San Francisco, CA June 27 & 28, 2011

REGISTRATION FORM

Check the appropriate box.

- Yes**, I will attend in San Francisco
- Enclosed is my check** for \$450 (by May 16, 2011)
- Enclosed is my check** for \$525 (after May 16, 2011)

Please make checks payable to **CompassPoint Nonprofit Services**

- Charge my** Visa Master Card American Express
- In the amount of** \$450 (by May 16, 2011)
- \$525 (after May 16, 2011)

Name on Card: _____ Cardholder Zip Code _____

Card Number: _____ Exp. ____/____ Signature _____

Please complete all fields of the registration form and return to:

CompassPoint Nonprofit Services
Attn: Next Steps Workshop
731 Market Street, Suite 200
San Francisco, CA 94103
Fax: 415.541.7708 or
email: shevad@compasspoint.org

PARTICIPANT INFORMATION			
Full Name:		Title:	
Organization Name:			
Organization Address:		City/State/Zip Code:	
Work Number:		Cellular Number:	
Fax Number:		Home Number:	
E-mail address:		Website:	
Are you a Casey Grantee?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a Blue Shield Grantee?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Why are you attending this workshop?			
What topics would you like addressed at this workshop?			
TENURE INFORMATION:			
Years As Executive Director:			
Role(s) Served:	<input type="checkbox"/> Founder <input type="checkbox"/> Nearly Founder (<i>functioned as founder or followed founder long-term</i>) <input type="checkbox"/> Long-Term Executive (<i>10+ years founder-like role</i>) <input type="checkbox"/> Other (<i>please specify</i>) _____		
Planning To Leave:	<input type="checkbox"/> Now <input type="checkbox"/> Within 12 months <input type="checkbox"/> 1-2 years <input type="checkbox"/> 2-3 years <input type="checkbox"/> 4-5 years <input type="checkbox"/> More than 5 years <input type="checkbox"/> Don't know		
ORGANIZATION INFORMATION:			
Year Founded:		Founded by:	
Staff Size:		Board Size:	Budget Size:(to nearest thousand) \$
Mission Statement:			
How did you hear about this workshop?	<input type="checkbox"/> Direct email <input type="checkbox"/> Referred by _____ <input type="checkbox"/> Other _____		
HOTEL INFORMATION			
For information about hotel accommodations, please contact Sheva Diagne at 415-541-9000 x 317 or shevad@compasspoint.org .			