



**ThirdSectorCompany**

# The Affiliated Interim Executive

**We're Looking For The Best  
In The Business ...Are You?**

The Affiliate Recruitment Portfolio  
The Third Sector Company, Inc.

**The Affiliate Recruitment Portfolio**

## **THE PROFESSIONAL RECRUITMENT PORTFOLIO**

### ***To Affiliate As A Professional Interim Executive***

**The Third Sector Company, Inc.**

On behalf of the staff and affiliates who comprise The Third Sector Company, thank you for your interest in our firm. Your desire to consider a candidacy for affiliation is greatly appreciated and we look forward to working with you as you consider your career in professional nonprofit executive management and capacity-building consultation and the unique features of our firm may offer to help build new skills, form new professional relationships and diversify your consulting practice and brand.

Third Sector Company is very proud to be the largest provider of interim executive managers for the community-based nonprofit services industry in Southern California. Both our staff and our affiliates represent the highest caliber of experienced professionals dedicated to voluntary mission-driven social advancement.

Our firm was founded with a commitment to lead nonprofit organizations to higher ground ... especially during times of crisis, transition and significant organizational challenges.

Each of our services, whether its assessments, management curricula, methodologies for peer-to-peer executive mentoring or interim executive services, we worked together to develop a unique corporation with the guarantee that experienced nonprofit professionals are the greatest assets in the community to support other nonprofit professionals and their causes during times of executive transition.

Each family member of Third Sector Company has direct experience in the nonprofit field. We understand the unique processes and politics of managing nonprofit organizations. We believe we provide a needed service to both the nonprofit service delivery system and to the professional consulting industry. Without a doubt, our organization is regarded as a national and international pioneer in the growing field of interim executive management for the third sector.

If you have what it takes to carry our brand, our commitment, our values and our dedication, we would very much like to work with you to welcome you to our family.

This recruitment portfolio tells you a little bit about Third Sector Company and begins the process for both of us to explore the possibilities of working together to help others.

You will find the experiences and competencies we expect from our people and the standards of conduct that are at the heart of the Third Sector Company brand are high. Accordingly, we have developed a seven-step process that can result in a mutually beneficial relationship for you, for our firm, and the highly valued clients that we serve. Thanks again for your interest in our firm.

Very truly yours,

**JEFFREY R. WILCOX, CFRE**  
***President and Chief Executive Officer***



## **WANT TO JOIN THE THIRD SECTOR COMPANY FAMILY?** *The Seven Steps To Affiliation With Our Firm*

Thank you for your interest in joining the most successful group of interim executive managers and professional management consultants devoted exclusively to the nonprofit sector in Southern California. Our firm appreciates your interest in our programs and invites you to consider with us whether Third Sector Company is right for you using a process that makes sure the best fit is possible for everyone.

The steps that are used in our affiliation process are as follows:

- (1) **Participate in a formal orientation about our firm** so that we may have the opportunity accurately and thoroughly portray the responsibilities and requirements of carrying The Third Sector Company brand in the marketplace.
- (2) **Submission of a complete application** that highlights your experiences and aspirations for growing nonprofit interim executive management as a component of your professional career and community service pursuits.
- (3) **Completion of a co-marketing agreement** that outlines the proprietary nature of the materials provided the use of the Third Sector brand and its intellectual property, and the terms by which we both regard each other's professional pursuits in the marketplace under separate and cobranded arrangements.
- (4) **Approval to conduct a thorough background and reference check** completed so that every Third Sector Company client can be guaranteed that our interims have been thoroughly vetted and do not have backgrounds that preclude their ability to serve vulnerable populations.
- (5) **Satisfactory completion of the first-year "Introduction to Interim Executive Management" course** which is offered in the United States at a fee of \$175 and in Canada at \$300.
- (6) **Participation in a peer-interview process** that allows current affiliated interim executives to review and recommend their peers for candidacy to the interim executive management practice following further discussion and information-sharing.

Upon favorable review, the new affiliate will have full participation in Third Sector Company service delivery, education programs and business development strategies. Until satisfactory completion of the first interim executive engagement, the candidate will be considered "provisional."

## **ABOUT OUR FIRM**

### ***Fostering A Continuity of Professional & Community Leadership for the Nonprofit Sectors of the United States and Canada***

Third Sector Company began in 2002 as Executive Consulting for the Nonprofit Sector in Long Beach, California. After 10 years of building a successful business, the name was changed to The Third Sector Company, Inc. indicative of the competencies of the firm and the evolution of the nonprofit sector. Today, the firm serves the Western United States and Canada in a virtual fashion with administrative headquarters in Seattle, Washington.

Third Sector Company is a unique mission-driven enterprise and entrepreneurial commercial venture. Founded by Jeffrey R. Wilcox, CFRE, former senior vice president of United Way of Greater Los Angeles and Executive Director of CHOC Foundation for Children, the organization represents highly-skilled, trained, and thoroughly vetted interim executive directors, each having served as an executive director or senior development or financial officer of a nonprofit organization for a minimum of five years. Additionally, our professionals represent a wide variety of consultation specialties in the fields of board governance, nonprofit law, internet strategies for nonprofits, succession planning and organizational development.

Our firm operates as a professional cooperative and has invested significant time and money in the development and protection of intellectual property and has trademarked a number of its services in the following service lines:

#### **Assuring Quality Executive Leadership Transition**

Third Sector Company Provides Comprehensive On-Site Transitional Management Services by providing Interim Executives with at least five years of experience as Chief Executive Officers, Chief Development Officers, Chief Financial Officers, and Chief Operating Officers. Our firm has set the standard for training, professional development and certification in the unique practice of transitional management science for the nonprofit sector. Third Sector Company has also developed one of the few manuals and consultation processes on the market for supporting volunteer executive search committees to complete their hiring tasks in a methodical and successful fashion. Today, Third Sector Company CEO, Jeffrey Wilcox serves as national chairman of the Executive Transitions and Leadership Succession Affinity Group for the National Alliance for Nonprofit Management.

#### **Preparing The Next Generation of Nonprofit Board Members & Executives**

Third Sector Company creates, offers, and licenses year-long institutes and cohort learning academies to groom the next generation of leaders for the demands of leading a community-based or member-based organization. The organization developed, trademarked and now licenses the highly-successful Board Chairs Academy and has been the lead training organization for The Wells Fargo New Executive Director's Institute of Greater Los Angeles, The Wells Fargo Leadership Institute, The Executive Service Corps Developing Development Program, Board Chair's Academy, and the British Columbia New Arts Leadership Project.

#### **Promoting Nonprofit Succession Planning As A Fundamental Business Strategy**

Third Sector Company is a pioneering organization in the field of nonprofit succession planning. Our affiliates are trained to work with organizations to assure that human capital development is a central piece of strategic planning, and to prepare organizations for planned and unplanned transitions in key positions.

#### **Lowering The Rate of Executive Attrition & Increasing Executive Retention**

Third Sector Company wants to be on the forefront of retaining good executive directors. Our services include executive performance planning, conducting third-party executive performance evaluations, and providing peer-based executive coaching and mentoring especially aimed at executives at risk of losing their positions based on perceptions of poor performance.

## **OUR PRINCIPLES OF PRACTICE**

A Professional Practice Guarantee Exclusively Offered By  
The Third Sector Company

The Third Sector Company aspires to be the leading resource for voluntary organizations in the United States and Canada for qualified interim executive officers, transitional management consultation services, nonprofit leadership development training, succession planning, and peer-to-peer executive mentoring.

Our firm's reputation and our expectations of the professionals who represent the Third Sector Company brand are based on the following five principles of practice that guide our methods for evaluating our people and ourselves.

***Principle #1:***

**WE HAVE A PASSION FOR COMMUNITY-BASED,  
MISSION-DRIVEN ORGANIZATIONS**

We affirm that society advances best when people work together to form a common vision of improved lives and communities. Our firm supports people to achieve their collective vision without bias, with confidentiality, and with a passion to help them to attain their goals and realize their societal missions. We recognize, applaud and financially contribute to nonprofit entities established to provide workshops, consultation and training to the nonprofit organization and we actively seek to partner rather than compete with these organizations in every circumstance.

***Principle #2:***

**OUR CONSULTING STYLE IS A MENTORING PROCESS**

We teach and demonstrate by example excellence in nonprofit executive management. We believe that the legacy of our work is best evaluated by the enhanced leadership skills demonstrated by the professionals and boards that we have engaged.

***Principle #3:***

**PROFESSIONAL INTEGRITY AND INDIVIDUAL ACCOUNTABILITY  
ARE VALUES INTEGRATED INTO EVERYTHING WE DO**

We hold each other to the highest standards of professionalism and ethics in the art and science of nonprofit executive management. Established performance measurements, clearly articulated deliverables and a formal program of client satisfaction research are fundamental practices of our firm.

***Principle #4:***

**A CLIENT RELATIONSHIP IS AN EARNED LIFE-LONG AFFILIATION**

We maintain that executive management is best served by long-term mentoring, training, and transitional services that are provided over the lifetime of the organization. We earn the continued business of our clients through reliable, honest, and high-quality service delivery at all times.

***Principle #5:***

**WE ARE COMMITTED TO RESEARCH & TRAINING IN  
NONPROFIT EXECUTIVE MANAGEMENT**

We maintain a corporate objective of preparing case studies based on our experiences, offering customized training and culturally-appropriate programs unique to the people we serve, enlisting speaking engagements, and publishing professional papers that will enhance the body of knowledge available to help executive managers to effectively lead voluntary organizations.

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**Minimum Qualifications**

**INTERIM CHIEF DEVELOPMENT OFFICER  
EXECUTIVE MENTOR IN NONPROFIT RESOURCE DEVELOPMENT**  
*An Invitation For Professional Affiliation*

Third Sector Company is the region's largest private firm devoted to interim executive management services for nonprofit organizations in transition due to retirement, termination, new position creation and leaves of absence.

Candidates for affiliation must meet the following guarantees provided to every client of Third Sector Company and The Third Sector Company:

- At least five years' experience as a senior fund raising executive with satisfactory references
- Completion of a satisfactory background check generally acceptable by federally funded nonprofit organizations providing services to children and vulnerable populations
- A track record of providing excellent client services through consulting relationships
- A proven ability to produce "Cases For Giving"
- Experience with fundraising database management and software use
- A portfolio of fund development plans that exhibit knowledge of market-based fundraising, development of donor cultivation strategies, division of labor through management planning, and measurements
- Experience working with boards of directors in developing and executing strategies aimed at resource development activities
- Highly visible interpersonal communication skills and facilitation experience to help diverse groups of people to buy-in to concepts and participate in their implementation
- A CFRE (certified fundraising executive) accreditation is preferred

Successful candidates will become part of the Third Sector Company family of affiliates responsible for representing the firm in interim positions, mentoring programs, training and management consultation often conducted in teams. Affiliates are expected to attend regular meetings of the firm, attend training programs provided by the firm, and subscribe to set of principles of practice that prescribe the professional values of the organization and the mandatory professional behavior practices required of each affiliate representing the organization.

Qualified candidates should provide a resume, a completed questionnaire, and references in electronic format to Helen E. Wardner, CFRE at [hwardner@thirdsectorcompany.com](mailto:hwardner@thirdsectorcompany.com)

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**Third Sector Company**

PO Box 1796 – Queen Anne Station  
Seattle, Washington 98109  
(206) 457-4993

**Minimum Qualifications**

**INTERIM EXECUTIVE DIRECTOR  
EXECUTIVE PEER MENTOR**  
*An Invitation For Professional Affiliation*

Third Sector Company is the region's largest private firm devoted to interim executive management services for nonprofit organizations in transition by retirement, termination, new position creation and leaves of absence.

Candidates for affiliation as an Interim Executive Director and Executive Peer Mentor must meet the following guarantees provided to every client of Third Sector Company and The Third Sector Company:

- At least five years of executive management as the chief professional officer of a nonprofit organization with satisfactory references
- Completion of a satisfactory background check generally acceptable by federally funded nonprofit organizations providing services to children and vulnerable populations
- A track record of providing excellent client services through consulting relationships
- A proven ability to supervise staff and operations systems of nonprofit social service, health care, arts or education institutions to achieve a strategic plan and demonstrate a community-based mission of service
- Demonstrated ability to effectively manage the financial systems of a nonprofit organization including budgeting, financial reporting, cash management, expense controls, and financial planning
- A portfolio of fund development experiences that have resulted in increased charitable and earned income for nonprofit organizations
- Solid experience working with boards of directors and other volunteers in developing and executing strategies that will achieve quantified measurements and identified benchmarks for organizational growth
- Highly visible interpersonal communication skills and facilitation experience to help diverse groups of people to buy-in to concepts and participate in their implementation

Successful candidates will become part of the Third Sector Company family of affiliates responsible for representing the firm in interim positions, mentoring programs, training and management consultation often conducted in teams. Affiliates are expected to attend regular meetings of the firm, attend training programs provided by the firm, and subscribe to set of principles of practice that prescribe the professional values of the organization and the mandatory professional behavior practices required of each affiliate representing the organization.

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**Third Sector Company**

PO Box 1796 – Queen Anne Station  
Seattle, Washington 98109  
(206) 457-4993

**CANDIDATE FOR AFFILIATION QUESTIONNAIRE**  
***Why Are You Considering Affiliating With Third Sector Company?***

The following questions help both you and Third Sector Company to consider your experiences and motivations for serving as an affiliated interim professional with our practice. Our brand represents the highest standards of transitional management practice, experience and integrity in the industry. Please complete the following questions as part of the initial screening process along with consideration of our standards of conduct and principles of practice. We appreciate your consideration of Third Sector Company as a potential partner serving nonprofit organizations.

**Why Are You Considering Affiliation With Third Sector Company At This Point In Your Career?**

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**What Do You Consider The Benchmarks Of Success In The Practice of Professional Consultation?**

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**What Are The Key Differences, In Your Opinion, About Consultation In The Nonprofit Sector As Opposed To Private Industry?**

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**What Types Of Consultation Engagements Provide The Highest Level of Personal and Professional Satisfaction In Your Professional Consulting Career?**

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**What Are The Significant Differences Between Consulting With A Nonprofit Organization and Serving As An Interim Executive?**

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**What Are The Unique Skills and Experiences That You Offer To Third Sector Company To Enrich The Portfolio of Professional Skills Available Through Our Firm?**

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**KEY QUESTIONS ASSOCIATED WITH AN THIRD SECTOR COMPANY AFFILIATION**

Please note that indicating “NO” to any of the following questions does not automatically disqualify candidates for affiliation from consideration.

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|---|-------|-------|
| 1. Do You Currently Have An Independent Consulting Practice?<br>If so, how long have you been in practice?  | YES   | NO    |
|   | _____ | YEARS |
| 2. Is Interim Executive Management currently an advertised service of your consulting practice?   | YES   | NO    |
| 3. Are You Willing To Work In Teams With Other Interims and Consultants To Provide Full-Service A Client?   | YES   | NO    |
| 4. Have You Ever Served As A Team Leader To Other Consultants?<br>If so, for whom?  | YES   | NO    |
| 5. Are You Willing To Attend Mandatory Training Sessions To Improve and Enhance Interim Service Delivery In Accordance With Third Sector Company Policies & Practices?  | YES   | NO    |
| 6. Are You Willing To File Client Progress Reports With The Firm To Legally Document Services Provided and File An Accurate Representation Of Hours Of Service Provided?  | YES   | NO    |
| 7. Are You Willing To Subscribe To A Set of Prescribed Values That Dictate Conduct in the Practice of Professional Consultation, Mentoring and Executive Management under the Executive Consulting brand?                                       | YES   | NO    |
| 8. Does Third Sector Company Have Your Permission To Contact Your Former Employers As A Reference?  | YES   | NO    |
| 9. Does Third Sector Company Have Your Permission To Conduct A Background Check To Verify To Every Client That We Serve That Our Affiliates Represent The Highest Standards of Conduct and Integrity To Support A Community-Based Organization? | YES   | NO    |
| 10. Are you willing to sign a co-marketing agreement that states you will Only provide Interim Executive Management Services under The Brand of Third Sector Company and NOT your own or any other Organization?                                | YES   | NO    |

**Additional Information**

Please provide any additional information about yourself, your consulting career, your interest in being a part of the Third Sector Company family or any other pertinent facts that you would want Third Sector Company to consider in your application for affiliation.

# PERSONAL INFORMATION SHEET

*A Confidential Reference Guide ONLY For Office Use At Third Sector Company*

YOUR LEGAL NAME: \_\_\_\_\_

YOUR PREFERRED NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE NUMBERS: \_\_\_\_\_ Residential Number

\_\_\_\_\_ Mobile Number

E-MAIL ADDRESS: \_\_\_\_\_

## EMERGENCY CONTACT

To Be Used Only By Third Sector Company In Case Of Emergency \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

EMPLOYMENT REFERENCE #1 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

EMPLOYMENT REFERENCE #2 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

CONSULTING REFERENCE #1 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I understand this information is provided to Third Sector Company for internal use only. This information is considered confidential and will be kept as a permanent resource document in my file with the company.

I understand that upon acceptance as an affiliate of the firm that my name, address and preferred phone number will be included in a company directory for distribution only to other affiliates. Third Sector Company has my permission to contact the references that I have listed as a prerequisite to acceptance for affiliation and to conduct a background check, at my expense, prior to affiliation. Final determination of candidacy for affiliation is at the sole discretion of Third Sector Company.

I fully understand that I am seeking an exclusive co-marketing arrangement with The Third Sector Company for representation, training and support as a practitioner of interim executive management services to nonprofit organizations. I am an independent contractor and free agent for any and all other services. I further understand that I am not a candidate for employment with Third Sector Company and am not agreeing to an employer-employee relationship of any kind with the company as an affiliated professional.

\_\_\_\_\_  
Candidate For Affiliation

\_\_\_\_\_  
Date