



Organizational Continuance – Transition Planning Pilot (OCTPP)

Expression of Interest Guidelines

Organizational Continuance – Transition Planning Pilot (OCTPP) Funding Program

June 2023



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1. Program Overview

The Organizational Continuance – Transition Planning Pilot Project (OCTPP) is a unique new program offered through the Community Sector Council Newfoundland and Labrador (CSC NL) designed to address a major labour market issue to ensure an organization is not threatened when there is a change in leadership. At times, organizations find themselves in a situation where critical staff are leaving either through retirement or for other reasons, taking with them the institutional knowledge and history, and these organizations often lack sufficient transition programs to stem the loss. This is a pilot project designed to meet a very specific need identified in our community and subsequently in [the Community Sector Work Plan](#) to advance the social and economic contribution of community organizations.

The pilot is designed to provide short-term “emergency” support to a few key organizations which are currently facing an immediate challenge to fill a senior position, and where the organization does not have sufficient resources to adequately maintain organizational continuance. It is specifically for organizations which are at risk because of lack of resources to ensure a smooth transition process.

A key organization can generally be described as one that has made a major economic and social contribution to a region and whose loss would leave a significant void in their area. It should have a proven track record in its specific type of business (five years) and a defined revenue stream over an extended period of time (i.e. grants, membership fees, earned income, etc.).

This is a one time program with a finite amount of funding and specific timelines. The nature of the project as a pilot allows for some flexibility to maneuver as the situation unfolds.

2. OCTPP Application Process

- CSC NL will hold one application period from June 8 – June 30, 2023.
- Funds must be spent by March 31, 2024.
- An informational webinar will be offered by CSC NL on June 8, 2023 to provide an opportunity for information and questions on the program and application process.
- A succession planning/transition training for selected key organizations will be held at a mutually agreeable time.
- Up to nine applicants will be selected.

3. Eligibility

Eligible applicants must be significant community based not-for-profit (NFP) organizations that are in the process of a change in senior management and have indicated insufficient resources to complete a smooth transition. The loss of such an organization would be a major economic and social loss to the region. Organizations must demonstrate that this staff person is leaving either through planned succession or a sudden departure.

Applicants should generally have the following:

- Imminent change in senior leadership.
- Proven track record in their area of work for a minimum of five years.
- Be a major contributor to the economy of the region.

- Have a defined revenue stream over an extended period of time (i.e. grants, membership fees, earned income, etc.).
- Indicate insufficient resources to complete a smooth transition within the senior role.
- Have an active Board of Directors.
- Be incorporated in the province of Newfoundland and Labrador prior to application and be in good standing.

Eligibility does not guarantee an automatic right to assistance.

4. How to apply?

- Expressions of Interest can be completed via an online secure application portal [here](#). If you experience technical difficulties, please contact Curtis Delaney CSC NL at curtisdelaney@cscnl.ca
- CSC NL's privacy policy is strong. Information collected via the online application portal remains private and accessible only to CSC NL staff. Evaluators of the OCTPP application will sign a confidentiality agreement to ensure they will not share confidential information.

5. Eligible Costs

- Financial costs associated with recruitment.
- Salary costs associated with overlap of senior employees.
- CSC NL staff (including an HR specialist) will work with selected applicants to develop and implement a recruitment plan.
- A budget will be developed in consultation with CSC NL staff as the recruitment plan is developed.
- Expenses incurred prior to project acceptance are not eligible.
- Expenses incurred after March 31, 2024 are not eligible.

6. Funding Levels

- Applicants must demonstrate that the organization does not have the resources to offset the costs associated with the transition.
- Applicants can receive up to \$30,000 to cover costs related to the project including transitional salary costs.

7. Application Process

- Application deadline is 5:00 pm (NST), June 30, 2023
- A five-stage process will be adopted:
 - Stage 1 – Expression of Interest (EOI) Received, EOI's reviewed by CSC NL staff for eligibility. Eligible applicants will move to stage 2.
 - Stage 2 – Eligible applicants will be contacted by CSC N staff for supporting documentation. This will include annual report, financial statements (do not have to be audited), planning documents including work plan, business plan, strategic plan, succession plan if available, list of Board members and staff.
 - Stage 3 – Eligible applications will be reviewed and selected by an arms-length, external review committee.

- Stage 4 – Applicants will be notified and one-on-one implementation will begin. An HR specialist and CSC NL staff will work with each applicant to develop and implement a recruitment plan. Successful applicants will be required to participate in two capacity building sessions – succession planning and strategic planning.
- Stage 5 – Completion and Evaluation of program

8. Resources

CSC NL will:

- host a webinar on June 8, 2023 to provide an overview and launch of the program and answer relevant questions;
- provide an HR specialist as well as CSC NL staff resource to work with successful project recipients; and
- host a webinar on HR succession planning/transition training as well as other training as identified.

9. Evaluation

An arm's length committee of three people will be established to assess eligible applications and select project recipients. This process will be completed and successful project recipients will be notified during the week of July 31, 2023 – August 4, 2023.

Applicants who contact members of the review committee will be deemed ineligible.

Proposals will be evaluated on the following criteria:

- Must meet all of the eligibility criteria and provide the required supporting documentation;
- Must demonstrate how the organization is a key economic and social driver in the region;
- Must be facing an immediate challenge to fill a senior position; and
- Must demonstrate financial need in the transition process.

10. Reporting and Project Completion

Organizations must meet the terms and conditions set out by CSC NL.

This includes:

- participation in reasonable learning and evaluation activities;
- a short project completion report which will be due within 30 days of the project's completion date. This will include time sheets indicating wages and other expenses paid; and
- successful project recipients must contact CSC NL for approval if they want to make any significant changes to the approved project

Organization deliverables include recruitment success, a Succession Plan and training and capacity building

For more information please contact Christine Snow at p: 709-753-9860/1-877-651-1140 or e: christnesnow@cscnl.ca.

11. Timelines

June 8, 2023:	Application portal open
June 8, 2023:	CSC NL Informational Webinar
5:00 pm, July 3, 2023:	Application Portal closes
July 4, 2023 – July 28, 2023:	Stage 1- 3 Evaluation
August 6, 2023:	Applicant notification and Acceptance Letter signed
August 7, 2023:	Stage 4: Project Implementation
August, 2023	Succession Planning webinar
January 31,2024:	Latest Project End Date
Depends on individual Projects:	Final Report (due two months after project completion date)