

Managing for Excellence Orientation 2018

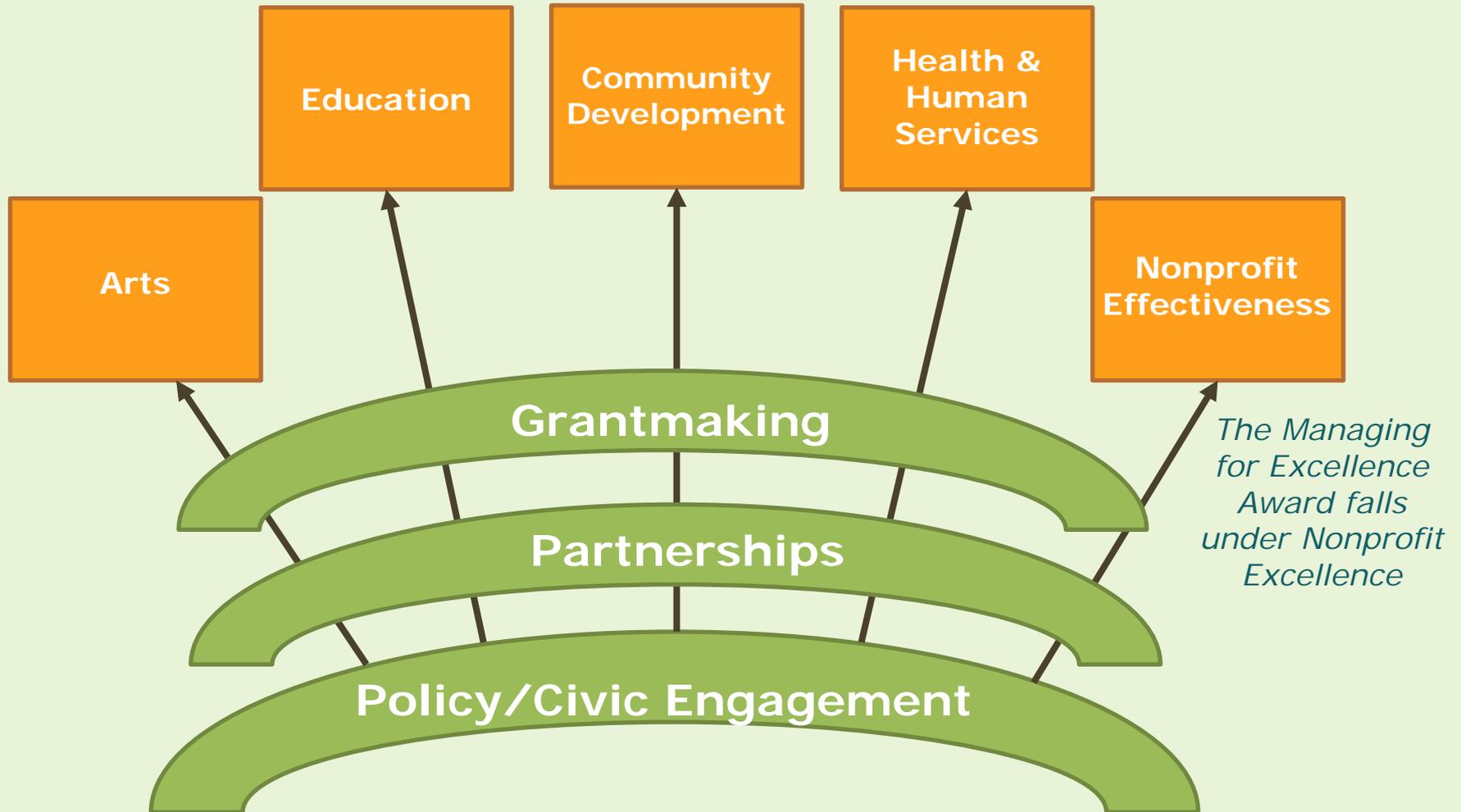


WELCOME!





Five Impact Areas





About Managing for Excellence

The Managing for Excellence Award is the Foundation's most competitive grant program, awarding two outstanding nonprofits each year. The award recognizes nonprofits that use excellent management practices and innovative thinking to drive impact within their organization and the communities they serve.

A special thanks to the Boston Consulting Group for their support of Managing for Excellence.



The Award

The Managing for Excellence Award program offers two award categories based on annual operating budget size.

- **Small Organization Category:** Awards one nonprofit with a current, annual operating budget under \$2,000,000
- **Large Organization Category:** Awards one nonprofit with a current, annual operating budget over \$2,000,000



The Award: What You Get

The Review Committee selects two awardees, one from each budget category. Each will receive:

- \$75,000 to each of the two awardees
- Consulting services by The Boston Consulting Group
- A one and half day leadership development opportunity at Kellogg School of Management at Northwestern University (includes travel expenses)
- A press release about the Managing for Excellence awardees created by the Community Foundation and serviced to major media outlets
- Inclusion in the Foundation's Extra Wish booklet, sent to all 750+ Foundation donors
- Special events throughout the year featuring Managing for Excellence awardees, including opportunities to tell their story to Community Foundation audiences
- Organization's name and photos in Community Foundation's Managing for Excellence lobby gallery hallway for 10 years



Community Foundation for Greater Atlanta's Managing for Excellence lobby gallery hallway



Literacy Action



Trees Atlanta



Girl Scouts of Greater Atlanta



2015

2014

2013

2012

2011

2010

2009

2008

2007

2006

2005

2004

2003

2002

2001

2016



Literacy Action



Trees Atlanta

2017



Am I Eligible?

- Organizations must have received at least one grant between August 2007 and October 2017 from the Community Foundation for Greater Atlanta.
 - Eligible programs include, but are not limited to: Atlanta AIDS Partnership Fund; Common Good Funds; field-of interest funds; General Operating Support; Grants to Green; Local Funds; Metropolitan Atlanta Arts Fund; Nonprofit Toolbox or donor-advised fund grants.
 - Applicants will state one qualifying grant on the application

Donor-advised fund grants are now considered qualifying grants.



Am I Eligible?

- ❑ Must be located and providing services within the [Foundation's 23-county service area](#);
- ❑ Must be classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the I.R.S. code as a nonprofit, tax-exempt organization, donations to which are deductible as charitable contributions under Section 170 (c)(2) and the I.R.S. determination must be current;
- ❑ Must be registered with the Georgia Secretary of State as a nonprofit ([click here to verify](#));
- ❑ Must have a minimum **two-year operating history** after the date of receipt of its 501(c)(3) classification;
- ❑ Must have annual operating expenses greater than \$100,000 as reflected in the most recently filed I.R.S. Form 990 ([click here for more information on Form 990](#));
- ❑ Must have at least **one full-time paid employee** (paid minimum wage or more, working at least 35 hours per week, classified as a W-2 employee) for the 12 months prior to submitting an application. Contractors or consultants do not count toward this requirement.



Am I Eligible?

- ❑ **Must have audited or reviewed financial statements** for the past two completed fiscal years as required by budget size. Organizations with annual budgets over \$250,000 must have audited financial statements; organizations with annual budgets between \$100,000 and \$249,999 must have reviewed financial statements;
- ❑ Must have a board of directors where 100% of members made personal cash donations or made financially measureable in-kind contributions during the last completed fiscal year (please note there is no required cash donation amount);
- ❑ Must have a board of directors representing the diversity and demographics of the community served, including individuals with varied skill sets and the committee structure necessary to succeed;
- ❑ National organizations with local chapters/affiliates or programs: local chapters/affiliates or programs must demonstrate local control over their finances and operations, and have a local governing board. Written documentation delineating local control over the local chapter/affiliate must be available upon request.



Am I Eligible?

- Must have a current written strategic or business plan for the whole organization that covers at least 24 months which includes the organization's entire current fiscal year and includes the following:
 - Mission and vision statements
 - Stakeholder participation (staff, board, consumers/clients, volunteers, etc.)
 - Strategic goals and measurable objectives
 - Implementation plan showing action steps, a timeline and assigned staff and board responsibilities
 - Quarterly, semi-annual or annual written assessment by staff and board to measure organizational progress towards goals

Preference will be given to strategic plans that include reference to resources (expenses and staff/board capacity) necessary to achieve goals and objectives

Through your strategic plan, we want to learn what success looks like for your organization.



Ineligible Organizations

- Organizations that have **not** received at least one grant between August 2007 and October 2017 from the Community Foundation for Greater Atlanta.
- Organizations that raise funds for publicly funded schools (K-12), institutions of higher learning and government agencies.
- Organizations that provide religious services or religious education. *Specifically, organizations that require attendance in religious services to participate in one or more of the organization's programs.*
- Organizations that have discriminatory policies and/or practices on the basis of race, color, national origin, age, disability, gender, marital status, familial status, parental status, religion, sexual orientation, genetic information or political beliefs.
- Organizations that have received a Managing for Excellence Award may not apply again until seven years have passed.



Application Overview: Deadlines

- **February 1, 2018 at noon:** Deadline to submit completed Organizational Profile, Common Grant Application, Managing for Excellence Round One Application Supplement and required attachments
- **March 8, 2018:** Select applicants contacted and invited to Round Two of Managing for Excellence
- **March 29, 2018 at noon:** Round Two applications due (for organizations invited to Round Two)
- **April 27, 2018:** Selected finalist applicants contacted and invited to schedule site visits at the organization's location
- **May 3-15, 2018:** Site visits are conducted to select finalists
- **June 29, 2018:** Applicants notified of award decision



Application Process: Round 1

Round One is due on **Thursday, February 1, 2018 at noon**

A complete Managing For Excellence Round One Application consists of:





Common Grant Application

Your [Common Grant Application](#) should reflect the essence of your organization. All the questions on the application are important, but we encourage you to take a close look at the following sections:

- How do you measure the effectiveness of your activities?
- Describe the results achieved within the past 12 months or as outlined in your strategic plan.
- What are the organization's opportunities and new initiatives over the next 12 months? How are you planning to address them?
- What are the organization's challenges or threats over the next 12 months? How are you planning to address them?
- How does the organization engage volunteers to support its mission-related activities?
- Volunteers: When are volunteers used? How do you ensure that you have enough volunteer? What makes your volunteer program compelling or unique?
- Partnerships: Tell us how your partners help make your organization stronger.
- Clarification on Financial Snapshot: Provide an explanation regarding significant surpluses, deficits, debt, etc.: Make sure to use this space, particularly if you have any kind of debt. If you have debt, make sure to explain your payment plan here and who the debt is from.



Application Round 1 Supplement

The Round One Supplement consists of a series of dropdown questions and essay questions asking about your organizational practices.

View	Program Management	Fiscal Management	Revenue Sources	Operations	Staff	Governance	Partnerships	Narrative
Documentation	Review							
Fiscal Management								
Board has a finance committee which meets at least quarterly and reviews agency budget and interim financial statements.						-- Please select -- ▼		
Board receives reports comparing budgeted vs. actual balances at least once each quarter and at fiscal year-end.						-- Please select -- ▼		
Organization has a budget for each major program.						-- Please select -- ▼		

The dropdown questions can be used as quiz or guide to help you determine if you are ready to apply for Managing for Excellence. If you select “no” or “not yet” on a majority of these dropdown questions, you may want to work on adopting/developing some of these best practices before applying.

Make sure to use the essay questions at the end of the Supplement to explain any practices you have not adopted.



Application Process: Round 1 Attachments

Staff

- Organizational chart showing titles, employee names and vacant positions
- Brief biographies of senior management staff

Governance

- [Board Information Form](#)

Financial Information

- Current fiscal year operating budget as approved by the board of directors
- Most current Balance Sheet
- Two most recent audited or reviewed financial statements as dictated by budget size
- If your most recent audited or reviewed statements do not include the most recent year-end, provide internal year-end balance sheet and year-end budget with actuals
- If your organization's fiscal year-end is within calendar year 2017, submit an operating budget for your next fiscal year
- [Annual cash flow worksheet](#)

Planning

- Complete, current strategic plan (not a summary)
- Complete, current resource development plan (not a summary)



What do you want to see in a Development Plan?

- How are you planning to raise fund over the next year to two years?
- What are your goals based on?
- If you expect your budget size to increase, how do you plan to raise funds/generate revenue to meet the budget?
- Who is involved in fundraising?



Application Process: Round 2

*** Selected Applicants will be invited to Managing for Excellence Round Two on March 8, 2018***

- The Managing for Excellence Round Two Application questions can be found [here](#). Please review the Round 2 application before starting the application process.
- The Managing for Excellence Round Two Application is **due on March 29, 2018 at noon**

Applicants invited to Round Two will have the opportunity to participate in a Q&A session about the Round Two application on **March 16, 2018 at 2pm.**



Application Process: Site Visits

- Select finalist will host Foundation staff & volunteers for a site visit at the organization's location.
- Visits generally last two hours, allowing the review committee to tour the organization's facilities, ask questions and gather any clarifying information
- The following individuals should be present at the visit:
 - Chair of the Board of Directors
 - Treasurer of the Board of Directors
 - Executive Director, President, or CEO
 - Lead financial officer (COO, CFO or others)
 - Key program leads at the discretion of the Executive Director



What are we looking for?

Strong Leadership

- Organization promotes an ethical, diverse and inclusive culture
How are you bringing people to the table?
- Investment in staff and volunteers
Why is your org a great place to work? Why do people want to stay?
- Responsive & proactive leadership
How does leadership respond to changing circumstance?



What are we looking for?

Mission and Impact

- Organization has a current strategic plan and regularly monitors progress toward goals in the strategic plan
How does your strategic plan guide your success?
- Thoughtful program and operational metrics
What does success mean to you? How do you measure success?
- Regularly seeks stakeholder feedback
Are stakeholders unified around the mission and goals?



What are we looking for?

Innovation

Organization considers new solutions to challenges and builds creative thought partnerships that lead to greater responsiveness and better efficiencies in programs, operations and governance.

- *How do you maintain a culture of continuous improvement?*
- *How are you responding to the needs of your stakeholders?*
- *How are you looking for areas of improvement & responding to them?*



What are we looking for?

Solid Business Practices

Organization has written policies and consistent practices for developing and reviewing the annual budget, assessing staff, implementing the strategic plan, and securing signed memoranda of agreement, confidentiality agreements and conflict of interest statements.

- *How do your written policies contribute to your success?*



What are we looking for?

Stable Infrastructure

- Financially sustainable
- Has a plan for building and maintaining operating reserves
- Invests in operations and technology



Review Committee

- The Managing for Excellence Award Review Committee is comprised of Community Foundation staff, Community Foundation donors, community leaders and past Managing for Excellence Awardees .



Before Applying

- **Review the Application:** Make sure you feel confident about your ability to answer questions in Round One and Two before beginning the application process.
- **Assemble your team:** Completing this application will likely require collaboration between multiple staff and board members.



Have more Questions?

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