

Managing for Excellence 2018 Award Guidelines



Managing for Excellence

ABOUT THE COMMUNITY FOUNDATION FOR GREATER ATLANTA

Since 1951, the Community Foundation for Greater Atlanta has been connecting donors, nonprofits and community leaders to strengthen the 23-county Atlanta region through philanthropy. As a top 20 community foundation of approximately 750 nationally, with approximately \$1.1 billion in current assets, Georgia's second largest foundation exists to connect the passions of donors with the purposes nonprofits strive to improve. Through its quality services and innovative leadership on community issues, the Foundation received more than \$144 million from donors in 2017 (unaudited) and distributed more than \$97 million that same year to support nonprofits throughout the region and beyond. For more information, visit: cfgreateratlanta.org or connect with the Foundation via [Facebook](#) and [Twitter](#).

At the Community Foundation, we believe in the power and potential of individuals and organizations to change communities, whether those communities are physical neighborhoods, a group of individuals with a common interest or a cohort of organizations focused on similar issues. We play a variety of roles, but our key goal is to be the connecting point for the various partners, nonprofit organizations and community leaders working together toward the common vision of stronger greater Atlanta region.

IMPACT AREAS

The Community Foundation for Greater Atlanta fulfills the passions of donors by investing in our region through grantmaking, partnerships and advocacy. To create meaningful, lasting change, our efforts align via measurable objectives through focused "Impact Areas." We practice what we preach – evolving beyond grantmaking strategies and industry jargon to real, tangible impact.

These five impact areas are our promise to the 23-county region - that in partnership with our donors, nonprofits and collaborators, we vow to make Atlanta a better place for all residents to live and thrive.



Arts



Community Development



Education



Nonprofit Effectiveness



Well-being

Arts >> Build a dynamic arts ecology to ensure all residents in our region will have access to high quality cultural experiences and diverse artistic programs.

Community Development >> Ensure that our region produces equitable economic growth, strong civic health and safe communities.

Education >> Improve outcomes and expand opportunities for all learners across the education spectrum, from early learning through post-secondary and workforce preparation.

Nonprofit Effectiveness >> Invest in the region's nonprofits with the tools and financial resources to effectively manage operations and high-performing programs.

Well-being >> Ensure a healthy, safe and engaged region, where residents have access to health care and nutritious food.

All of these impact areas are complex and multi-dimensional and require cross sector, regional collaboration: these are problems with solutions that cannot be achieved by any one entity. The Foundation has an extensive base of knowledge and relationships across the region, spanning diverse communities, populations and issues, making us uniquely poised to serve as a hub for impact.

WHAT IS THE MANAGING FOR EXCELLENCE AWARD?

The Managing for Excellence Award recognizes nonprofits that use excellent management practices and innovative thinking to drive impact within their organization and the communities they serve. Well-managed, high-impact nonprofits invest in their talent and infrastructure, implement tools for assessing their programs and collecting audience feedback, and seek out opportunities for innovation and continual improvement.

Managing for Excellence applicants are assessed on all aspects of their management and operations. The review committee will seek to learn why your organization is exceptional, how your attributes add up and how your management excellence contributes to your success. Competitive organizations will demonstrate they have the infrastructure for long-term impact and consistent delivery of services through economic and leadership transition.

Organizations selected for this award have strong written policies that guide their governance practices, a thorough strategic plan that unifies the organization's board, staff and volunteers, responsive evaluation methods, outstanding program outcomes, robust partnerships that expand the organization's reach and demonstrate cultural competence in all aspect of the organization's work.

MANAGING FOR EXCELLENCE AWARD PRIORITIES

The Foundation's grantmaking through Managing for Excellence is directly aligned with our goal of strengthening the region's nonprofits. Awards are made on a number of factors, including the following:

Strong Leadership – leaders promote an ethical, diverse and inclusive culture, are invested in developing the capacity of staff and volunteers, and respond proactively to challenges and opportunities.

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.

Stable Infrastructure – organization is financially sustainable, has a plan for building and maintaining policies for operating reserves and invests in operations and technology.

Mission and Impact – organization has a current strategic plan and regularly monitors progress toward goals in the strategic plan. The organization has thoughtful program and operational metrics and regularly seeks stakeholder feedback.

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.

Please see page 7 for details about how organizations are evaluated and page 8 for eligibility criteria.

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

Each of the two awardees will receive a \$75,000 unrestricted grant, consulting services by Boston Consulting Group, a targeted professional development opportunity for a staff leader and a board member and several opportunities for public recognition for this achievement.

Deadlines & Process Overview

DEADLINES & GRANT CYCLE

| | |
|--------------------------|---|
| December 21, 2017 at 2pm | Online orientation session . A recording of the webinar will be posted online after Decemeber 21. |
| February 1, 2018 at noon | Deadline for nonprofits to submit their complete Organizational Profile, Common Grant Application, Managing for Excellence Round One Application Supplement and required attachments (see page 5 for details) |
| 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: A SUMMARY OF HOW IT WORKS

- 1] Organizations must submit the online [Organizational Profile and Common Grant Application](#), Round One Application Supplement and required attachments via the Nonprofit Online Portal by February 1, 2018 at noon.
- 2] Foundation review committee will review all Round One materials. The committee will select organizations to move on to Round Two of the application process.
- 3] Round One applicants will receive email invitations to complete the Round Two application or denials.
- 4] Invited organizations must submit the Round Two Application via the Nonprofit Online Portal by March 29, 2018 at noon.
- 5] The review committee will invite selected applicants to move on to the site visit stage.
- 6] The review committee will conduct site visits with the selected finalist organizations on May 3-15, 2018.
- 7] Award recommendations will be made to the Foundation's Board of Directors.
- 8] Organizations will be notified of their award status by June 29, 2018.

Incomplete or late applications will not be considered.

GRANT ORIENTATION

To help you understand the application process and give you an opportunity to ask questions, Community Foundation staff will provide an online orientation session on **Thursday, December 21, 2017 at 2 p.m.** Register here: <https://cc.readytalk.com/r/n3gfpq3t8y8x&eom>. Attending the orientation is not required but highly encouraged. Prospective applicants who are unable to join the live orientation are encouraged to review the recorded orientation session presentation (PowerPoint and audio) that will be posted on the [Community Foundation's website](#) after December 21.

ROUND ONE

The Managing for Excellence Round One Application is **due on Thursday, February 1, 2018 at noon.**

The following are required as part of a complete Round One application packet:

Organization Information

- ◆ Organizational Profile and Common Grant Application (submitted via the [nonprofit online portal](#))
- ◆ Round One Application Supplement (submitted via the [nonprofit online portal](#))

Required Attachments (submitted via the [nonprofit online portal](#))

Staff

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

Governance

- C. [Board Information Form](#)

Financial Information

- D. Current fiscal year operating budget as approved by the board of directors
- E. Most current Balance Sheet
- F. Two most recent audited or reviewed financial statements as dictated by budget size
- G. 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
- H. If your organization's fiscal year-end is within calendar year 2017, submit an operating budget for your next fiscal year
- I. Annual cash flow worksheet (Applicants who do not have their own cash flow projection template should use [this template](#).)

Planning

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

ROUND TWO (invitation only)

Managing for Excellence's volunteer Review Committee evaluates the Round One applications and, on March 8, 2018, invites a small number of selected organizations to submit a more detailed, narrative application for Round Two. The Round Two Application is **due on March 29, 2018 at noon** and should be submitted through the Nonprofit Online Portal. A preview of the 2018 Round Two Application can be found [here](#). Applicants invited to Round Two will have the opportunity to participate in a Q&A session about the Round Two application on Friday, March 16, 2018 at 2pm.

SITE VISITS

After reviewing the Round Two applications, the review committee will select organizations to receive a site visit in May. Visits generally last for two hours, allowing the review committee to visit the organization, tour the facilities, ask questions and gather any clarifying information needed from the written applications. If invited to receive a site visit, 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

AWARDS

Following the site visits, 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 or pieces in Community Foundation digital media 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

HOW ARE ORGANIZATIONS EVALUATED?

Managing for Excellence applicants are evaluated on their management policies and operational practices. Priority will be given to organizations that:

- ◆ Submit applications reflecting organization-wide planning and decision-making
- ◆ Exhibit strong financial management, including sufficient cash flow, diversity of funding sources and maintenance of an operating reserve
- ◆ Have a clear and articulated vision for implementation and success of the strategic plan
- ◆ Demonstrate active use of a current strategic or business plan
- ◆ Continually update plans and programs to reflect the current economy and community needs
- ◆ Budget, evaluate and have stated goals for each program
- ◆ Have board members who are actively engaged and contribute financially
- ◆ Provide evidence of shared leadership and succession planning
- ◆ Maintain a variety of partnerships increase organizational efficiency and program impact
- ◆ Are responsive to audience or client feedback
- ◆ Demonstrate cultural competence and a high value for diversity in all forms
- ◆ Provide sustainable and innovative solutions to community need
- ◆ Align with the Foundation's Impact Area metrics

READINESS TO APPLY AND COMPETE

Before committing to participate in the Managing for Excellence process, Foundation staff recommends that organizations:

- ◆ Carefully review the Managing for Excellence Application to make sure you feel confident about your possible answers before completing a full application.
- ◆ Engage your organization's staff and board leadership early. Past awardees indicate they engaged leadership of the board of directors and management staff in preparing both the Round One and Round Two applications.
- ◆ Review the Foundation's six [best practice areas](#) to develop a deeper understanding of the Foundation's view of best management practices.

TIPS FOR COMPLETING THE APPLICATION

- ◆ Instructions for creating or updating your [Organizational Profile](#)
- ◆ Instructions for creating your [Common Grant Application](#)

QUESTIONS?

For questions about the overall Managing for Excellence process or eligibility requirements please contact Lauren Jeong at 404.688.5525 or ljeong@cfgreateratlanta.org.

ELIGIBLE ORGANIZATIONS

Nonprofit organizations that meet the following requirements are eligible and invited to apply for the Managing for Excellence Award:

- ◆ 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 Fund; field-of interest funds; General Operating Support; Grants to Green; Local Funds; Metropolitan Atlanta Arts Fund; Nonprofit Toolbox or donor-advised fund grants. Organizations will be asked to identify a grant that meets this criterion.

Criteria:

- ◆ 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 (please note that contractors or consultants do not count toward this requirement);
- ◆ Must have audited or reviewed financial statements that follow Generally Accepted Accounting Principles (GAAP) or Government Auditing Standards (GAS) 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.
- ◆ 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 measureable 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

INELIGIBLE ORGANIZATIONS

The following organizations are **not eligible** to apply for funding:

- ◆ Organizations that have not 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 Fund; field-of interest funds; General Operating Support; Grants to Green; Local Funds; Metropolitan Atlanta Arts Fund; Nonprofit Toolbox or donor-advised fund grants.
- ◆ Private and publicly funded schools (K-12) and institutions of higher learning. This does not include nonprofit charter schools.
- ◆ Organizations that raise funds for publicly funded schools (K-12), institutions of higher learning and government agencies.
- ◆ Organizations that provide religious services and/or education.
- ◆ 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.

QUESTIONS?

Review the [Managing for Excellence Frequently Asked Questions document](#).

For questions about the overall Managing for Excellence process or eligibility requirements please contact Lauren Jeong at 404.688.5525 or ljeong@cfgreateratlanta.org.

Nonprofit Effectiveness

The Managing for Excellence Award is highly competitive. Although fundraising staff typically develops many applications, the Managing for Excellence application is not a standard grant request and requires engaging leadership of the board of directors and management staff in preparing both the Round One and Round Two applications. Completing the Managing for Excellence application can be rigorous. If the Managing for Excellence Award does not feel like a good fit for your organization, we encourage you to review some of the Foundations other grant programs.

RESOURCES FOR NONPROFITS THROUGH THE NONPROFIT EFFECTIVENESS PROGRAM

In 2016, the Community Foundation's Nonprofit Effectiveness Fund will provide resources for nonprofits' professional and organizational development.

The Foundation's seven priority areas for Nonprofit Effectiveness are:

- ◆ Strategic Planning
- ◆ Financial Management
- ◆ Board Development
- ◆ Resource Development
- ◆ Marketing Planning
- ◆ Human Resources
- ◆ Succession Planning

Opportunities available to nonprofits include:

Nonprofit Toolbox

The Nonprofit Toolbox provides nonprofit organizations with tools to strengthen their management, governance and operations. Nonprofit Toolbox awards are not financial grants; they are custom-designed packages of management consulting to help solve a key organizational challenge or problem. Organizations selected to receive a Nonprofit Toolbox will work with a consultant who will construct a package of appropriate organizational development assistance. Nonprofit Toolbox grants (non-cash and cash awards) are also available to build organization's capacity through technology.

Details on the Toolbox application process and deadlines can be found [here](#).