

Achieving Excellence 11 application

Part A1: Intro and About You



FYI only---must complete & submit app online

Thank you for your interest in the *NeighborWorks Achieving Excellence Program*.

Please note that we are seeking candid responses to all of the following questions, from you and those providing letters of reference. The *NeighborWorks Achieving Excellence Program* (Achieving Excellence) is comprised of a diverse group from across the nonprofit sector, including different lines of business, organizational sizes, participant races and ethnicities and backgrounds, strengths and weaknesses. Your honest responses will help us select a diverse group of various talents that will help each other achieve even greater success across the sector.

Please be advised that--though you are free to navigate through the application pages at your own pace--we ask that you provide a response to every question before finally submitting your application. We recommend viewing a PDF of the application to look it over first and possibly begin answering the questions offline first. A PDF copy of the application (for viewing only) is available at www.neighborworks.org/ae.

Once you have provided your introductory information, you will also be able to save your responses and return to the application at a later date and time.

If you have any questions or issues, please email aeprograms@nw.org.

Complete applications must be received by the deadline.

The new deadline will be 11:59pm Eastern time on Friday, September 16, 2022

Note that we will allow a few extra days for reference letters to be received.

We will notify all applicants of our decisions and expect to do so by November 18, 2022.

Full name (as you would like it to be appear on a formal certificate) *

Nickname you prefer to be called (if different from first name listed above)

VALIDATION %s format expected

Your email address *

Organization *

Title

Mailing Address

City

State

FYI only---must complete & submit app online

VALIDATION Whole numbers only

Zip

Code

Phone Number

FYI only---must complete & submit app online

These next 2 questions are optional. Please answer as you are comfortable. NeighborWorks America would like to better understand how we are serving the broad diversity of the nonprofit community, who is applying for our program(s) and we want to look at our programs from multiple perspectives.

If any of the following categories properly describes your racial/ethnic origin, please select all that apply. If not, please enter your answer in the box provided.

- American Indian or Alaska Native
- African American or Black
- Asian (includes Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese or other Asian)
- Caucasian
- Hispanic, Latino or Spanish (includes Mexican, Mexican American, Chicano, Puerto Rican, Cuban and other Hispanic, Latin or Spanish origins) Mexican American, Chicano, Puerto Rican, Cuban and other Hispanic, Latin or Spanish origins)
- Native Hawaiian or Pacific Islander
- Other, not listed here and/or mixed race (please specify)

How do you identify your gender?

- Female
- Male
- Other:

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What is your organization's mission? Please limit your response to no more than 2-3 sentences.

Is your organization's mission or service area likely to change in a **significant** way in the near-future (ie, expanding to an additional state, changing mission significantly, etc.)? If so, how and when?

When was your organization founded?

FYI only---must complete & submit app online

Which best describes your organization?

- Nonprofit
- Public sector/government
- Quasi-governmental
- For-profit/private sector
- Other - Write In

1. Please describe the communities/clients served by your organization (e.g., residents of one city block, people with disabilities throughout the state).

VALIDATION Must be numeric

What is your organization's current staff size? (If possible, please just enter the number—no commas or words)

VALIDATION Must be numeric

What was your organization's staff size five years ago?

FYI only—must complete & submit app online

What is your organization's current annual operating budget? (Answer this to the best of your ability. In most cases this is a straightforward answer. If you have questions about how to define this, feel free to explain your answer here if necessary. Also--if possible--please just enter the number—no \$ or commas or words.)

What was your organization's annual operating budget five years ago?

Please give us a **general** idea of the geographic focus (urban, rural, or suburban) of your organization's work. Please indicate the areas and provide approximate percentages of your organization's work/time that is focused on each. These can be rough estimates "guess-timates"--we are just trying to get a sense of the work that you do. No need to be exact on these 2 questions.

(e.g.:

Rural 100%

or

Urban 50%

Suburban 50%)

FYI only--must complete & submit app online

Please give us a **general** idea of the types of work your organization does. If your organization focuses on more than one line of business, please indicate the appropriate lines below AND provide approximate percentages of your organization's work/time that is focused on each. You can define these terms as you see fit. Again, no need to be exact or list everything--we are just trying to get a sense of the work that you do. (for example:

Homeownership counseling 100%

or

Rehab for energy efficiency 50%

Home-based health services for elderly residents 50%)

Your Role in Your Organization

How long have you been with this organization?

How long have you been in your *current* position?

FYI only--must complete & submit app online

VALIDATION Must be numeric

How many direct reports and other staff are under your management? If 0, just enter 0.

What is the size of the budget for which you are responsible? If 0, just enter 0.

LOGIC Show/hide trigger exists.

Is your organization an official chartered member of the NeighborWorks® network (note that you do NOT need to be a member to participate in AE--this is just for our general information)?

- Yes
- No
- Not sure

LOGIC Hidden unless: Question "Is your organization an official chartered member of the NeighborWorks® network (note that you do NOT need to be a member to participate in AE--this is just for our general information)?" is one of the following answers ("Yes")

In what NW region is your organization?

- Northeast
- Southern
- Western
- Midwest

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VALIDATION Accepts 1 file. **Allowed types:** png, gif, jpg, doc, xls, docx, xlsx, pdf, txt. Max file size: 750 KB

We want to better understand your organization and your position within it. Please provide a copy of your organizational chart. This can be a graphic or, if that doesn't already exist, a written description of your role in the organization and in relation to others in the organization is acceptable.

Please:

- **Use the following naming protocol for this document:**
YourLastName YourFirstName OrgChart
- Submit in PDF format if at all possible
- Limit yourself to one attachment for this question
- If for some reason you are unable to attach your document, please use the same naming protocol noted above then email to CDeady@nw.org. No need to email if you have attached it here.

Browse...

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VALIDATION Accepts 1 file. **Allowed types:** png, gif, jpg, doc, xls, docx, xlsx, pdf, txt. Max file size: 750 KB

In PDF format, please provide a résumé or CV so we can better understand the different roles you've served, your interests, etc.

Please:

- **Use the following naming protocol for this document:**
YourLastName_YourFirstName_Resume
- Submit in PDF format if at all possible
- Limit yourself to one attachment for this question
- If for some reason you are unable to attach your document, please use the same naming protocol noted above then email to CDeady@nw.org. No need to email if you have attached it here.

Browse...

Part B1: Achieving Excellence Awareness

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How were you referred to the Achieving Excellence program (ie, how did you hear about it)?

Why are you applying to participate in the NeighborWorks Achieving Excellence Program and why now? *

VALIDATION Max. answers = 1 (if answered)

Have you previously applied to participate in AE?

- Yes
- No

LOGIC Show/hide trigger exists.

Has anyone from your organization participated in Achieving Excellence?

- No
- Yes--Please list name(s):

LOGIC Hidden unless: Question "Has anyone from your organization participated in Achieving Excellence?" is one of the following answers ("Yes--Please list name(s):")

Is the person that participated in AE still with your organization?

 Yes
 No

2. If you know when that person participated in AE, please state the dates here. If more than one person from your organization has participated in AE, please include all names and dates that you know--or approximations.

Program Expectations

Now we are going to take *a lot of space* and several pages to ensure that you are aware of different elements of AE and that you will be as set up for success as you possibly can be. Please bear with us--this is all suggested by the graduates and coaches of AE through the years and we all feel that it will help YOU have the best experience you can. Please read through it all. The 10 minutes you spend reading, answering honestly and signing off here could make the 16 months of this program much easier & clearer for you.

Lessons Learned

FYI only--must complete & submit app online

If you are considering any changes in your work or personal life in the near future that may affect your availability or ability to fully participate in this intensive program then this may not be the right time for you to apply to AE. Examples might include a sabbatical in the next two years, finding a new job or position, running for elected office, major change in personal life, retirement in the next few years, etc.

If you are not considering any such changes & this is not applicable to you, please put "n/a".

If you do think such changes are a strong possibility in the future, please consider if you should wait until the next round to apply. Being in AE at the RIGHT time will yield significantly greater results than trying to force it at the wrong time and you may end up leaving the program early.

If such changes ARE likely but you still think this is the right time for you to participate in AE, please provide a few details to the extent you're comfortable (remembering that the information in this application will be kept confidential) and please explain why you think this is the right time despite potential upcoming changes.

*

****READ****

Lessons Learned from Past Participants

There are a few points and "lessons learned" that are consistent across classes. Graduates of the program have asked that we share these with you as clearly as possible:

Cost Awareness

The cost per participant to deliver the NeighborWorks Achieving Excellence Program is greater than \$42,000. Each participant, however, only pays 18%-38% of that total via tuition (dependent upon the organizational size). That is because the cost for each participant is heavily subsidized by NeighborWorks America and our partners/funders.

The total cost covers the weeks of sessions at Harvard including the teaching, meals, lodging at Harvard and also lodging for the "Chicago meeting". It covers the 16 months of executive coaching for you and the facilitation of your peer group by the coach; several books and other reading materials; 2 group meals in restaurants (the first week of the program and the night before the "Chicago meeting") and other expenses. We see the tuition as your contribution to the program and as a symbol of your serious commitment to engage in the program.

We often say that your biggest cost for the program is the time and commitment to your performance challenge, but we recognize that these direct financial costs are significant too. Please be aware that, as noted in the application materials, you are responsible for:

- **Tuition:** \$7,500-\$16,000, depending on the size of your organization
- **Travel and travel-related costs:** There will be approximately 5 trips for which participants are responsible:
 - 2 round-trips to Harvard
 - 1 meeting in Chicago
 - 2 meetings (at least) with your peer group at a location selected by the group and coach together (could be anywhere in the country; lodging & other costs for these meetings are the responsibility of each participant).

Of course, travel costs will vary depending on locations, dates, etc. There will be other incidental expenses too, such as transportation from the airport to the university/hotel, etc. These costs are not covered by the program--these will all be the responsibility of you and/or your organization.

- **Some meals:** Most of the meals at the university are included in your tuition but sometimes there will be "dinner on your own" or planned dinners with your group, for which you are responsible to pay.
- **Other:** Possibly other expenses, such as purchasing souvenirs, etc.

Time commitment awareness

We want to be very, very clear that the greatest time commitment of the NeighborWorks Achieving Excellence Program is **not** in the time that you spend away for in-person gatherings, but the time that you dedicate to your performance challenge day after day back at the office over the 16 months of the program and beyond.

The performance challenge will be defined by you and your organization. It will be one of the most important issues that must be addressed for your organization to be successful. **Many participants spend 60-70% of their time working to address their organizational performance challenge.** You, too, will be expected to contribute the time necessary to achieve success. The program gives the push, the tools

and the forum to focus intensely on one of the most important issues facing your organization so most of your time will probably be spent on it.

We are also making a significant investment in each participant by covering 70-85% of the cost of the program and we do expect each participant to invest whole-heartedly with their time and energy.

Mandatory Program Dates

Although the bulk of the time you spend for the program will be your time at the office, it is mandatory that each participant attend all sessions. For your planning purposes, please make sure that these dates will work with your schedule. If not, then you may want to apply for a future session or if you want to discuss, please send an email to AEprograms@nw.org. These are not all final but close:

- **Introduction & Orientation** (*online*): Mid-January & early February--exact dates TBD
- **Harvard Module 1** (Cambridge, MA): Sunday, February 26 - Friday, March 3, 2023
- **"Chicago meeting"** (Chicago, IL): Two days during the week of April 24, 2023--exact dates TBD
- **Summer meeting** (in person): July 2023; the date and location of the summer meeting is set by the peer group, so participants will have a chance to check their availability and plan together as a group based on availability
- **Harvard Module 2** (*online*): October 2023--exact dates TBD
- **Online session & peer group meeting** (*online*): The dates of the online summer meeting is set by the peer group, so participants will have a chance to check their availability and plan together as a group based on availability
- **Harvard Module 3** (Cambridge, MA): Dates not yet set for Fall 2023 but most likely will be in February 2023
- **Final meeting** (in person): Spring 2024; The date and location of the final meeting is set by the peer group, so participants will have a chance to check their availability and plan together as a group based on availability

In addition, we may contact you for a phone interview before making our final decisions.

You will be pushed outside your comfort zone

Please note that you WILL be pushed outside of your comfort zone as it relates to your leadership style and looking in different ways at the way you do your work, how you interact with others, how you engage with the world as far as your race, ethnicity, creed and views of yourself in the world. If you are not willing to expose yourself to that experience and potential learning opportunity, please assess that now and determine if you should not apply for the program at this time.

Return on Investment

The graduates have wanted us to be clear about those issues but to be equally clear that anyone that puts in the hard work will consider the return on investment much, much greater than the inputs.

Part B2: Commitment

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Have you read the "Lessons Learned from Past Participants" page and do you understand the time commitment necessary? *

- Yes, I will make the time commitment
- No, I'm not willing

Are you willing to be pushed outside your comfort zone? *

- Yes
- No

If accepted, are you willing to support your peers and be an active contributor to your AE peer group in order to help others achieve success? *

- Yes
- No

The time at the in-person sessions will give you the tools, approaches and support you need to be successful. The university sessions, the guidance from your coach and the input from your peers are all carefully designed to set you up for success as you work on your challenge. If accepted, do you understand and agree to a.) attend all in-person sessions because they are **mandatory** (note that you will know the dates of the sessions before you sign an Acceptance Form to commit to the program) and b.) participate fully in each and every in-person session, coaching call and otherwise whole-heartedly participate in the program? *

- Yes
- No

Do you understand that there will be substantial costs in addition to the tuition and, if accepted, are you willing to incur those costs as a part of your participation in the program? *

- Yes
- No

If your answer to any of those is "no", then please feel free to discuss with Christina Deady (CDeady@nw.org, 202-760-4192) and/or consider if this is the right time for you to apply to AE.

(untitled)

We are now done with the "sign-off" pages. Again, all of that is meant to help you understand what you will be getting into if you participate in AE and, with that, trying to start now to set you up for success.

These next few pages are also about helping set you up for success--but now we want to hear about YOU. We want to know what you're like in a group, what you'd like to get from coaching and what challenges your organization is facing.

Please be honest, *be real* and know that all of this information will be used to set you up for success once you're in the program (if accepted) by better understanding you, how you like to work, what peer support and coaching will work best for you.

Part B3: Short Answer--Peer Group & Coaching Interaction

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In just a few words, please describe yourself when you are a participant in working with new groups of people--for example, introverted, extroverted, leader, organizer, mediator, cheerleader, etc. There is no correct answer, we just seek a diverse group and we may use this information when putting peers together in a group.

A key component of this program includes working one on one with a professional coach whose focus is to support you in working toward achieving your performance challenge while deepening your knowledge and use of the AE tools and principles. Please say a few words about what you would be looking for in a coaching relationship.

If accepted into the program, what would you like your coach to know about your communication style and approach toward growth and learning?

What does it mean to you that an organization has a commitment to diversity, equity and inclusion? How have *you* demonstrated that commitment?

Part C: Essays

FYI only---must complete & submit app online

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Your greatest organizational challenges drive the content of the program and are the focus of the essay questions below. All of the resources of the program are focused to help you tackle your challenge. Your firm commitment to spend at least 16 months addressing this challenge, with coaching from our consultants, training from the university faculty, and feedback from your peers, is fundamental to admission.

A note: In your own words, please just tell us about the challenges you face, what outcomes you hope to achieve, etc. We will not be assessing this information on grammar or use of big words--we merely want to understand what you are facing and what you hope to get from this program. One way to think about this is that you are just writing an email to an old colleague that you haven't seen in a while, telling that colleague the situation, the big challenge you're facing, etc.

Your essay should be comprised of three focused parts. **There is one essay box below--please include ALL responses in that one box.** You may want to answer these offline then paste your full responses here.

PART I: Please limit your response to less than 750 words total (about 1.5 pages) to address the following questions:

1. What is the most substantial challenge facing your organization over the next 2-3 years?

By this we mean an issue that affects the organization and its potential success or failure in the future; something that is so big you cannot tackle it by yourself (ie, you also need the support and contributions of other people in the organization and/or outside); you may or may not know how to address the

issue, but you know it needs to be addressed; it is something that you would need to spend substantial time addressing in your day-to-day work in the coming year whether you participate in AE or not.

NOTE: We understand that the program may not start for several months and so we understand that this "challenge" may change or be tweaked before and/or during the program. In fact, the first several months of the program are spent working to properly define the challenge. Therefore, there is no need to feel that what you write here will absolutely be the challenge that you address in AE (it may or may not be).

2. Please include (either bulleted like below or within the text of your answer) the following:

- a. How does this challenge relate to the core mission or work of your organization?
- b. Describe how you see your role in the current situation--how you played a role in the current situation coming to be as well as the role you would need to play to successfully tackle this challenge?
- c. What are the risks inherent in taking on this challenge for your organization and your constituency?
- d. Whose engagement and support will you need to succeed?
- e. How will you demonstrate a commitment to diversity, equity and inclusion as you go about tackling that challenge?

PART II: Please limit your response to less than 250 words total (about half of one page) to address the following questions:

1. What does "success" in the Achieving Excellence program mean to you? Specifically, what are the most important outcomes for the challenge you've described that you seek to accomplish through your participation in AE? What will be different about you, your organization, your community for having committed 16+ months to this program?

PART III: Please limit your response to less than 250 words total (about half of one page) to address the following questions:

1. Tell us about an experience that you struggled with in your work--you were stuck, you made a significant mistake, etc. What caused you to get stuck or what led to the mistake and how did you address that? What did you learn from it? Did it lead to any changes in your work, behavior or thinking?

2.) Please tell us about a time that you had to go outside your comfort zone--please briefly describe the situation, what that was like for you and how, if at all, it affected you afterward? *

FYI only---must complete & submit app online

FYI only---must complete & submit app online

Part D: Co-commitment and Partnership Letters

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FYI only---must complete & submit app online

Applicants are asked to provide a co-commitment letter from either their organization's board (for applying Executive Directors) OR their organization's CEO/President/Executive Director (for applying senior managers). This letter is intended to help us learn a little more about you and also to help that person/entity understand that they and all or most of the organization will necessarily be a part of the program with you, even though only *you* will attend the sessions. Since you will be helping transform your organization, it is important that others are bought into the process with you and understand what may come. More information in the document linked below.

We ask for a letter from the board chair or CEO, but we recognize that sometimes there is a reason that the board chair or CEO may not be the best person to write the letter (e.g., board chair is exiting next month so won't be involved in the challenge, CEO is on sabbatical for 6 months, etc.). If the letter will come from someone else, please let us know who and why (briefly) but also ensure that the goals mentioned above can be met by the person writing the letter--that person has a leadership role in the organization and will be a part of the organizational challenge you will work on, that person is "co-committing" to the program and the changes that may come from it, etc.

Please indicate who will be supplying your co-commitment letter:

- Board Chair
- CEO/President/Executive Director
- Other and reason that letter is not from Board Chair or CEO/ED:

Please provide the name of the person providing this co-commitment letter:

Is the person writing the letter a graduate of the *Achieving Excellence* program?

- No
- Yes

If you are an Executive Director applicant, please click [HERE](#) to download the instructions to share with your Board.

If you are a senior manager applicant, please click [HERE](#) to download the instructions to share with your CEO/President/Executive Director.

As also noted in the attachment, the Board or CEO (or other letter writer) should send their co-commitment letters to aeprograms@nw.org.

As a reminder, we want all co-commitment letters submitted by the application date of September 16, 2022. However, we will allow a few extra days for those letters to come in.

Part E: Additional Reference Letter(s)

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We'd like to get to know you better and also to better understand your potential challenge. **If you'd like (but you don't need to)**, you can provide **one additional letter of reference** from a professional partner--perhaps a funder, a partner in local government, a peer in the nonprofit community, etc.

It is **very strongly preferred** that this letter come from someone with whom you may be working on the performance challenge you outlined above. If, for example, your challenge would include partnering with another organization, then a letter from that CEO may be helpful. If you have not yet established the relationships for the partnership, then please do not rush that in order to get a letter. But, to the extent appropriate, a letter from someone relevant to the challenge is preferred.

The letter(s) should include the length of time the individual has known you and in what capacity. Please provide the attachment below to the person and ask that they include it as the letter's cover sheet.

Please provide the name of the partner providing your reference letter:

Please click [HERE](#) to download the form, which should be attached as the cover sheet of your partner's reference letter.

Completed reference letters should be submitted by e-mail (preferred) or mail to:

E-MAIL: aepgrams@nw.org

NeighborWorks Achieving Excellence Program

NeighborWorks® America

ATTN: Christina Deady

999 North Capitol Street NE, Suite 900

Washington, DC 20002

Part F: Additional Support Materials (OPTIONAL)

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OPTIONAL: If you would like to provide a web address that would be helpful in describing your organization or work, please do so below:

VALIDATION Accepts up to 3 files. **Allowed types:** png, gif, jpg, doc, xls, docx, xlsx, pdf, txt. Max file size: 750 KB

OPTIONAL: If you would like to supply any other materials for consideration, you may do so here.

Please use this naming protocol if submitting any documents:

YourLastName_YourFirstName_DescriptiveTitleofDocument

Browse...

(untitled)

Congratulations and thank you! You have completed the application and appear ready to submit.

NOTE: IF YOU HIT "SUBMIT" BELOW, YOUR APPLICATION WILL BE CONSIDERED COMPLETE AND WILL BE SUBMITTED TO NEIGHBORWORKS AMERICA. Please be sure that you are ready to submit the completed application before you hit the button below. If you do submit in error, Christina Deady (CDeady@nw.org) may be able to send you a link to re-enter the application.

Thank You!

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FYI only---must complete & submit app online

Congratulations! Your application has been submitted.

Please be advised that this application and your attachments must have all been submitted **by the deadline of 11:59pm Eastern time on Friday, September 16, 2022** though we'll allow a few extra days for letters from your references to arrive.

We will notify all applicants of our decisions and expect to do so by November 18, 2022

E-MAIL: aeprograms@nw.org

In addition, we may contact you for a phone interview before making our final decisions.

If there are any changes to the timeline or any announcements, we'll notify all applicants in advance.

Thank you for your interest in the *NeighborWorks Achieving Excellence Program!*

New AE11 application submitted

To: cdeady@nw.org

From: FYI from Alchemer re: AE apps (noreply@alchemer.com)

Subject: New AE11 application submitted

Thank you for applying to the NeighborWorks Achieving Excellence Program

To: [question("value"), id="11"]

From: NeighborWorks America (noreply@alchemer.com)

Subject: Thank you for applying to the NeighborWorks Achieving Excellence Program

**Board Co-commitment Letter for CEO/Executive Director Applicants:
CONSIDERATIONS BEFORE APPLICATION**

Dear Board Chair,

The success of your CEO/executive director in the NeighborWorks Achieving Excellence Program (Achieving Excellence) will be aided by strong support from the Board. This program requires an intensive commitment to solve one of the most critical issues facing your organization in the coming years. It will bring changes to the organization and perhaps even major transformations. The CEO will be the organizational representative in the program, but the entire organization will be involved. Therefore, the Board's commitment to supporting the participant in this program is critical. Note that we are not asking for a "nomination letter" for your CEO to participate in the program—we are seeking your commitment to the work that the organization will undertake as part of this program and your support of the CEO as he/she does so.

***Considerations for Boards of Directors with a President/CEO/ED
participating in Achieving Excellence***

- Make sure that the performance challenge that the participant(s) will work on has your full support, that you know this is who you want working on that challenge and that you will authorize the participant(s) to make transformational change in your organization
- Be sure that the rest of the organization knows that the AE participant has your full support in pursuing this challenge
- Encourage open communication and specific feedback about what you can do – or stop doing - to be more helpful in supporting performance challenge goals
- Check in with your participant(s) on their progress
- Encourage and support their ongoing learning and growth
- Allow time and space for their performance challenges and coaching calls
- Welcome this opportunity to strengthen your governance team and to model honest and useful communication even when the going gets tough. To realize adaptive challenges participants may need to raise difficult issues with you – how can you work to create a "safe space" for this conversation – perhaps even being explicit about it.

FOR BOARD MEMBER PROVIDING RECOMMENDATION

- *The board views participation in Achieving Excellence (AE) as a way to support the leadership of a highly effective executive*
- *At the appropriate time, and at the request of the AE participant, the board will review the executive's/senior staff members Performance Challenge and provide constructive feedback*
- *The board will discuss and reach agreement on ways it can provide support to the AE participant during the course of the program to ensure they achieve their Performance Challenge*
- *We have the staff and board leadership in place who meet our present and near future needs*
- *Among the board, executive and management team there is a high degree of alignment about goals and strategy*
- *I understand that issues related to race, equity, diversity, and inclusion (REDI) will be an important part of the performance challenge and I commit to keeping those at the forefront of our work together. Together we will run the Performance Challenge through a REDI framework to ensure our communities get the outcomes they seek.*
- *Our organization has sufficient financial resources to maintain sustainability and to meet its commitments in the short to mid-term*
- *We do not see any significant threat to organizational sustainability in the near term*
- *The full board has concurred in the responses to these questions*

FOR POTENTIAL AE PARTICIPANT

- *At the appropriate time in the AE program I will present my Performance Challenge to the board and seek their feedback and support*
- *I foresee no situation or event on the horizon that could threaten my tenure or the stability of the organization*
- *I understand that issues related to race, equity, diversity, and inclusion will be an important part of the performance challenge and I commit to keeping those at the forefront of our work together*
- *The value and accomplishments of this organization are well understood by the board, staff, volunteers and the constituents we serve*
- *Our organization has sufficient financial resources to maintain sustainability and to meet its commitments in the short to mid-term*

ANONYMITY & HONESTY

Please note that we are seeking candid responses to the questions below and an even-handed assessment of your senior manager's abilities from your perspective. This information will never be shared with the applicant unless YOU choose to share it.

The NeighborWorks Achieving Excellence Program is comprised of a diverse group from across the country, including different lines of business, strengths and weaknesses, organizational sizes, backgrounds, etc. Your honest responses will help us select a diverse group of various talents that will help each other achieve even greater success across the field.

We recognize that you may want to avoid sharing any 'opportunities for improvement' in case they would negatively influence our decisions, but everyone has areas for improvement and knowing these will help us better match the applicant with a coach and appropriate peer group to actually achieve improvement in those areas

INSTRUCTIONS

REQUIRED CONTENT

1.) Please include in the letter:

- YOUR NAME
- Your role in relation to this applicant (e.g., you are the in-coming board chair)
- THE APPLICANT'S NAME

2.) Please also include in your letter at least the following information:

- A description of this person's scope of authority (he/she should have principal responsibility for leading a large, substantive segment your organization)
- Three most significant professional assets, especially his/her demonstrated leadership in the organization
- Three of his/her professional limitations
- In as much detail as possible, please tell us specifically how you plan to provide support to the candidate during their time in the program working to accomplish the organizational performance challenge and how, together, you decided on the challenge that the participant will work to address while in the program

3.) Also please seriously consider the following:

- If you know of any major organizational changes on the horizon—CEO change, merger, etc.—please mention that. Anything you say is completely confidential. If you do not want to state specifics, that is understandable, but please at least reference that there are major changes on the horizon.
- If you do not think that the person applying is the right person to lead significant change in your organization, or if you think this person does not have a significant future there, please do not recommend them for the program. As a reminder, we will never show this letter to the applicant.

REQUESTED FORMAT

4.) There is no specific required format. You can send an email, a letter on letterhead, whatever is easiest for you. We do ask that you include the information noted above.

5.) When you submit, please use this naming protocol:

NomineesLastName NomineesFirstName Nomination YourName (for example, Smith_John_Co-commitment_Sally Jones)

6.) **Submit by email to aeprograms@nw.org** (you can also use this contact if you have any questions)

7.) Note that you should receive a response immediately or very soon after your email. If you do NOT get a confirmation email within 24 hours, feel free to contact aeprograms@nw.org to get confirmation that it was received.

8.) If you would like further information about the NeighborWorks Achieving Excellence Program, please go to www.NeighborWorks.org/ae

**CEO/President/Executive Director Co-Commitment Letter for
Senior Manager Applicants:
CONSIDERATIONS BEFORE NOMINATION**

Dear CEO/President/Executive Director/Supervisor,

Strong support from you is essential to the success of your senior manager in this program. Your commitment is critical to the participant successfully tackling the organizational challenge that you identify together as one of the most important issues facing your organization in the coming years. Note that we are not asking for a "nomination letter"—we are seeking YOUR commitment to this program as your staff member is the organizational representative in the program, but the entire organization will be involved.

Please carefully consider the questions and issues outlined below and on page 2. If you feel all of those apply and you are ready for your organization to participate in the NeighborWorks Achieving Excellence Program, we look forward to hearing about your commitment to be actively engaged to help your staff member during this transformational process.

FOR POTENTIAL AE PARTICIPANT

- *At the appropriate time in the AE program I will present my Performance Challenge to my supervisor and/or the CEO and/or the board as appropriate, and seek their input, feedback and support*
- *I will openly, honestly and respectfully communicate with other senior organizational leaders about how to tackle the performance challenge, even when the going gets tough. I know that I need buy-in from other organizational leaders to ensure that the work isn't just "my" performance challenge, but OUR performance challenge*
- *To the best of my ability, I will share with other team members what I am learning so that we will all be learning together and working together on this transformational journey*
- *I understand that issues related to race, equity, diversity, and inclusion will be an important part of the performance challenge and I commit to keeping those at the forefront of our work together*
- *I foresee no situation or event on the horizon that could threaten my tenure or the stability of the organization*
- *Our organization has sufficient financial resources to maintain sustainability and to meet its commitments in the short to mid-term*

FOR CEOs/SUPERVISORS PROVIDING RECOMMENDATION

- *I view participation in Achieving Excellence (AE) as a way to support the leadership of a highly effective executive. This person is a high-achieving employee that I value and I believe will continue making valuable contributions to the organization in the future*
- *I understand that the performance challenge will be something that affects not just the participant, but the participant's entire program/division and/or the entire organization.*
- *At the appropriate time and at the request of the AE participant, I will provide thoughtful input in crafting the Performance Challenge and I will provide constructive feedback.*
- *I will ensure that the performance challenge has my full support. I will support the participant(s) in making appropriate (though sometimes painful) necessary changes*
- *I will ensure that the rest of the organization knows that the AE participant has my full support in tackling this challenge*
- *I understand that issues related to race, equity, diversity, and inclusion will be an important part of the performance challenge and I commit to keeping those at the forefront of our work together*
- *I will allow time and space for their performance challenges and coaching calls*
- *I will discuss and reach agreement with the participant about how I can provide support during the course of the program to ensure we achieve the Performance Challenge*
- *Our organization has sufficient financial resources to maintain sustainability and to meet its commitments in the short to mid-term. We do not see any significant threat to organizational sustainability in the near term*
- *I will encourage open communication and specific feedback about what I can do—or stop doing—to be more helpful in supporting performance challenge goals. I will check in regularly and may even ask if there is anything I am doing that is blocking progress*
- *I will consider this an opportunity to strengthen our internal leadership ladder by allowing the participant—as appropriate—to delegate more responsibilities of substance, by focusing the organization on performance outcomes and by holding people accountable for results*
- *I will encourage and support the participant's on-going learning and growth*
- *I welcome this opportunity to strengthen our management team and to model honest and useful communication even when the going gets tough. To realize adaptive challenges, participants may need to raise difficult issues with you—consider and implement ways that you can create a “safe space” for this conversation, perhaps even being explicit about it.*

ANONYMITY & HONESTY

Please note that we are seeking candid responses to the questions below and an even-handed assessment of your senior manager's abilities from your perspective. This information will never be shared with the applicant unless YOU choose to share it.

The NeighborWorks Achieving Excellence Program is comprised of a diverse group from across the country, including different lines of business, strengths and weaknesses, organizational sizes, backgrounds, etc. Your honest responses will help us select a diverse group of various talents that will help each other achieve even greater success across the field.

We recognize that you may want to avoid sharing any 'opportunities for improvement' in case they would negatively influence our decisions, but everyone has areas for improvement and knowing these will help us better match the applicant with a coach and appropriate peer group to actually achieve improvement in those areas

INSTRUCTIONS

REQUIRED CONTENT

1.) Please include in the letter:

- YOUR NAME
- Your role in relation to this applicant (e.g., you are CEO and the applicant is CFO)
- THE APPLICANT'S NAME

2.) Please also include in your letter at least the following information:

- A description of this person's scope of authority (he/she should have principal responsibility for leading a large, substantive segment your organization)
- Three most significant professional assets, especially his/her demonstrated leadership in the organization
- Three of his/her professional limitations
- In as much detail as possible, please tell us specifically how you plan to provide support to the candidate during their time in the program working to accomplish the organizational performance challenge and how, together, you decided on the challenge that the participant will work to address while in the program

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8.) If you would like further information about the NeighborWorks Achieving Excellence Program, please go to www.NeighborWorks.org/ae

Reference Letter

Nominee's Name _____

Nominee's Organization _____

Name of Recommending CEO/President/ED (Your name) _____

City _____ ST _____

Telephone Number _____ E-mail Address _____

INSTRUCTIONS

As part of the NeighborWorks Achieving Excellence Program selection process and to better inform our small group selection process within the program, we'd like to get to know the applicant better. The applicant would like you to write a letter of reference for him/her.

- 1.) Please provide a letter of reference that includes the length of time you have known the applicant and in what capacity.
- 2.) Please include this cover sheet when you submit your letter of nomination
- 3.) **To submit:**
 - a.) If at all possible, please convert your letter to PDF
 - b.) If at all possible, please combine this cover sheet WITH your letter so they are 1 PDF document
 - c.) **When you submit, please use this naming protocol:**
NomineesLastName NomineesFirstName Reference YourName
(for example: Smith John Reference SallyJones)
 - d.) **Submit by email to aeprograms@nw.org** (you can also use this contact if you have any questions)
 - e.) Note that you should receive a response immediately or very soon after your email. If you do NOT get a confirmation email within 24 hours, feel free to contact aeprograms@nw.org to get confirmation that it was received.
 - f.) For further information about the program, please go to www.NeighborWorks.org/ae