



center for nonprofit
advancement



aim
for excellence

presented by



MilestonePlans

application packet

   #AIMAward

 nonprofitadvancement.org



aim
for excellence

Information & Application

The AIM for Excellence Award Competition is an annual award presented to a Washington, DC metropolitan area nonprofit organization for outstanding achievement in organizational management.

“AIM” stands for “Advancement in Management,” and this competition honors superior nonprofit management, recognizing sustainable best practices and highlighting innovation that leads to excellence. The competition is a program of, and administered by, the Center for Nonprofit Advancement and presented by Milestone Plans. The competition is judged by a selection committee of experts assembled by the Center. The 2018 competition marks the twenty-fourth anniversary.

Sponsors

The competition is owned and administered by the Center for Nonprofit Advancement. Milestone Plans serves as the Presenting Sponsor of the Award.

Eligibility

The competition is open to any 501(c)(3) nonprofit organization – regardless of budget size/scope of programming – based in the Washington metropolitan area. The Washington metropolitan area is defined as:

- District of Columbia
- Maryland: Anne Arundel, Calvert, Charles, Frederick, Howard, Montgomery, St. Mary’s and Prince George’s counties.
- Virginia

The competition is also open to any organization that is a current member of the Center for Nonprofit Advancement.

Applicant organizations must be separately incorporated as a 501(c)(3) organization (with its own articles of incorporation, board of directors, etc.) and not be a subsidiary or satellite office of a nonprofit organization incorporated in another region.

While applications are welcome for both long-established as well as newer organizations, applicant organizations must have been in operation for at least three (3) complete fiscal years to be eligible to apply. If the applicant represents separate organizations that have merged, the newly merged organization must have been in operation for one (1) complete fiscal year.

If an organization wins the Award, that organization is ineligible to participate in the competition for the following five years (e.g., the 2018 award winner cannot participate until the 2024 award competition.)

This does not apply to organizations receiving Honorable Mention.



The Award Competition

One organization will win the AIM for Excellence Award Competition, which includes a \$20,000 grant. Up to two honorable mentions will each be presented with a \$2,500 grant.

The Center for Nonprofit Advancement will also provide the winning organization, as well as the Honorable Mention organizations, appropriate resources and tools through which they can promote their achievement on their website, materials, and other communications.

The Winner and both Honorable Mention recipients are required to participate in an award presentation and best practices educational session that will feature management practices identified during the competition. This presentation will take place in June of 2018. If an organization is unable to participate in the session, it will sacrifice the monetary award.

Any winner or honorable mention recipient who is not a member of the Center for Nonprofit Advancement at the time of the Award presentation will be granted membership status for a 12-month period, providing the organization full access to resources, goods and services available to all Center members. Membership dues will be deducted from the recipient's grant award.

The Executive Director/Chief Executive Officer of the winning organization will be asked to participate as a member of the Selection Committee for the following award process.

The Selection Process

The Competition incorporates a three-part judging process:



The Award Selection Committee is an all-volunteer committee recruited by the Center for Nonprofit Advancement. The Center and its staff facilitate the Award process and overall management, but they have no voting role during the adjudication process. Representatives from sponsors may also participate as non-voting observers on the Selection Committee. Every effort is made to protect the integrity of the competition process, adhering to best practices and high ethical standards, such as monitoring confidentiality and conflicts of interest.



Feedback

All applicants receive brief written comments on their Part One or Part Two applications from the Selection Committee. This feedback is shared with the organization's primary contact via e-mail within 60 days of notification that the organization is no longer in consideration for the Award. (In other words, applicants invited to complete Part Two will not receive feedback on their Part One application. They will receive feedback if they are not selected as a finalist.) Finalists will receive comments after the award process is complete. Applicants can also contact a member of the Center's staff for additional feedback or guidance after the selection process has been completed. At the discretion of the Center's staff, finalists may be able to contact the chair of the Selection Committee for additional perspective.

How To Apply: Part One

Any qualified organization interested in applying for the Award should access and submit the application online at www.nonprofitadvancement.org. (Please see Page 1 for eligibility criteria.) The Part One application consists of a detailed Fact Sheet, Application Questions, and Supplemental Documentation.

In formulating responses, applicants should bear in mind that the Award competition focuses on management excellence and not programmatic implementation. Any discussion of programs should be minimal, and mentioned only in support of excellent management practices. Only one application per organization will be accepted. Other than the requested supporting documents (see page 9), do not send books, videotapes, manuscripts or other unrequested materials. These will not be reviewed nor returned.

To submit the Part One application:

Visit nonprofitadvancement.org to access the fillable application and additional materials. All requested information must be emailed to Taylor Strange at taylorstrange@nonprofitadvancement.org by **Friday, February 23**. Please head subject line as 'AIM18'

To mail-in the Part One application:

Center for Nonprofit Advancement
1666 K Street, NW, Suite 440, Washington, DC 20006



► **Part Two: Semifinals**

Based on a review of the Part One applications, up to ten semi-finalists will be notified no later than March 23, 2018 that they will advance. These organizations will be invited to complete the Part Two application.

To submit the Part Two application:

Each organization selected to move to this stage of the competition will be able to access the fillable application online at nonprofitadvancement.org. The requested documents need to be submitted by midnight on Tuesday, April 17, 2018. If mailed, they must be postmarked by April 17, 2018 and sent to the above address.

► **Part Three: Finals**

After a review of Part Two applications, the Selection Committee will choose up to three finalists who will be notified by Thursday, May 10, 2018. These organizations will be invited to participate in site visits, which will take place between May 21 and June 8 of 2018. Members of the Selection Committee will attend the site visits in addition to Center for Nonprofit Staff and sponsor representatives. Every effort will be made to ensure that as many Selection Committee members as possible attend all of the site visits.

Site visits will consist of a 30-minute presentation made by the finalist organization followed by 60 minutes of questions posed by members of the Selection Committee. Finalists will be provided additional guidance and information on the format and structure of the site visits. During the 30-minute presentation, finalists may be asked to respond to a few targeted questions, which will be submitted to the finalist in advance. Such questions will be posed by members of the Selection Committee after review of the Part Two applications.

► **Further questions**

Organizations interested in learning more about the AIM for Excellence Award Competition are strongly encouraged to review this entire application package carefully.

Though not required, applicants are invited to attend an Application Information Session to ask questions of Center staff, AIM Award Selection Committee, and previous AIM winners. The dates of the information sessions can be found in the Program Table below.

Questions can be directed to:

Taylor Strange, Center for Nonprofit Advancement
1666 K Street, NW, Suite 440, Washington, DC 20006
Telephone: 202.457.0540
E-mail: taylors@nonprofitadvancement.org



Award Guiding Principles

The AIM for Excellence Award Competition focuses on nonprofit management and not on programmatic implementation and execution. As organizations prepare application materials, they should consider the following elements that inform the Selection Committee’s review of applications:

Competence is the foundation for management excellence and serves as the baseline for the review process. In almost every management area, commonly accepted standards have been established. Competent organizations meet and apply these standards as they carry out various management activities. They make clear, well thought out, and deliberate decisions about how management activities will be accomplished, based on these accepted standards. As applications are reviewed, the Selection Committee will look for demonstrated evidence of competence throughout all of an organization’s responses, signs that the standards for acceptable practice or approach are being met.

Best Practices are techniques, methods, activities or processes that have been proven to achieve a desired result or performance level within organizations. As applications are reviewed, the Selection Committee will look for examples where an organization’s specific practices are guiding their management activities and decision-making in particularly effective or noteworthy ways. Best practices can be found in the implementation of any management activity, whether it’s financial, human resource, fundraising, governance, capacity building, or collaboration.

Innovation is approaching the management of an organization in new ways, resulting in exceptionally effective results or transformational outcomes. The Selection Committee looks for evidence that innovative thinking is an organizational value, openness to alternative solutions or novel tactics. The Award recognizes that innovative ideas can change over time. As more organizations adopt an innovative practice, such practices become an expected competency or best practice for most organizations.

Innovative approaches do not replace or supplant best practices, but rather the two combined offer opportunities for learning and increasing the body of knowledge throughout the sector. For this reason, the final award celebration pays special attention to practices and tactics that can be easily shared and which can inspire others to excel in their own management activities.



Award Criteria

Throughout the review process, the Selection Committee looks for:

- Competency in management areas. (see below)
- Established management practices with documented accomplishments, focusing on the past three years.
- Indication of new plans, ideas to be implemented, which arise from the implementation of best practices or innovative thinking.
- Intentional integration of best practices into management practices and decision-making.
- Innovative practices that can be shared with other organizations or that advances the broader understanding of management practices in the sector.
- Evidence of sustainability, long-term impact and integration of practices into the organization's ongoing culture.

There is no single example of nonprofit management excellence. In reviewing applications, the Selection Committee considers competency, best practices, and innovation in a wide range of management practice areas. The application questions explore the approach an organization takes for each of these focus areas, however each area does not necessarily have its own separate question. These practice areas are listed below.

Board Development & Management: The actions necessary to govern the organization through effective fiscal, legal, and mission oversight, as well as ensuring public trust and stakeholder representation; the effective deployment of volunteer leadership bodies to provide such oversight, guidance and support, including board of directors, advisory boards, leadership councils, etc.

Diversity & Inclusion: The inclusion of diverse perspectives and stakeholders in the leadership and operation of the organization including: planning, decision making, evaluation, and the people engaged as staff, board and volunteers; a demonstration that such diversity and inclusion efforts are integral to an organization's values, operational strategies, and advancement of the mission.

Evaluation: Activities undertaken to assess organizational and/or programmatic performance, as well as those actions taken to use evaluation results to drive management decision-making; the establishment of systems and processes that facilitate the effective collection and use of valid information to support evaluation efforts; an openness to sharing evaluation results with stakeholders in ways that foster trust and confidence.

Fiscal Management: The appropriate allocation, expenditure, control, and accounting of financial resources; maintaining the organization's financial stability and sustainability; a thoughtful review and analysis to ensure that an organization's revenue sources are appropriately balanced and in alignment with its mission and values.



Communication: The strategy and processes by which an organization’s purposes, goals, and objectives are passed to its various constituencies -- staff, board, members, media, clients, the general public -- to facilitate cooperation, coordination, awareness-building on issues, and/or general knowledge sharing; also includes the metrics by which the success of those communication efforts is judged.

Leadership & Integrity: The ways through which an organization sets itself apart in the nonprofit sector, including ways through which it builds trust, demonstrates transparency, and provides leadership within the community on behalf of its work/issue/mission; the ways that an organization seeks to share success stories and best practices in order to advance the cause and/or the sector; organizations that exhibit a commitment to high standards and ethical behavior.

Organizational Development: Deliberately planned, institution-wide efforts designed to increase overall organizational effectiveness and/or efficiency as well as to enable the organization to meet its strategic goals; the effective use of organizational development tactics to build the nonprofit’s capacity to manage through disruptions or change.

People Development & Management: The steps that organizations take to build and support an effective staff to accomplish its mission, and the effective deployment of volunteer resources to appropriately supplement the staff in fulfilling the mission; the methods by which nonprofits ensure that employees and volunteers reflect the communities the organization serves, and that they have the knowledge, skills, and resources they need to be successful.

Planning: Describes the ways through which an organization charts its future course. This includes the decision-making processes that help identify an organization’s immediate and longterm objectives, and formulating and monitoring specific strategies to achieve those objectives. Effective planning also encompasses resource allocation – staffing and financial – as an integral part of the process.

Awareness, learning, & adaptability: The ways through which an organization demonstrates a recognition of its own special characteristics, features or abilities within the marketplace, as well as an understanding of its own limitations as an organization. Also includes an organization’s resilience and ability to bounce back from and learn from mistakes, poor decisions, or other challenges, as well as its capacity to discern emerging risks and plan accordingly.

Resource Development: The strategies and tactics through which an organization seeks, obtains, and sustains the financial and material resources necessary to achieve its purposes.

Risk Management: Activities relating to the protection of an organization’s assets (both financial as well as non-financial, such as its brand or reputation,) clients, employees, volunteers and systems from harm including programs to ensure standards of prudent care are implemented.

Technology: Effective use and leveraging of technology in accomplishing an organization’s mission, including incorporating effective use of hardware, systems, technical resources and knowledge, and social media.



2018 AIM Award Timeline

Jan

January 16: Opening of Applications

Applications are available for any 501(c)(3) nonprofit organization – regardless of budget size/scope of programming – based in the Washington metropolitan area

Feb

February 23: Part I Application Due

Part One of the application consists of a detailed Fact Sheet, Application Questions, and Supplemental Documentation

Mar

March 23: Semifinalists Notified

Up to ten semi-finalists will be notified that they will advance.
These organizations will be invited to complete the Part II questions

Apr

April 17: Part II Application Due

Part Two of the application consists of application questions and supplemental documentation.

May

May 11: Finalists Notified

One winner and two honorable mentions will be selected as 2018 AIM Award recipients.

June

TBD: AIM Award Best Practice Session & Award Presentation

The area's top nonprofits share their organizational management strategies.



AIM for Excellence Award Competition
 Part One Application Fact Sheet & Supporting Documents

Questions can be directed to: Taylor Strange, Center for Nonprofit Advancement
 Telephone: 202.457.0540 | E-mail: taylors@nonprofitadvancement.org

Organization: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Website: _____

Primary Contact: _____

Job Title: _____

Email: _____ Phone Number: _____

Chief Executive: _____

Title: _____ # of years in current position: _____

Staff and Volunteers: # of full-time: _____ # of part-time: _____ # of volunteers (excl. board): _____

- Are there job descriptions for all positions? YES NO
- Are there annual performance reviews for all positions? YES NO
- Do you have an employee handbook? YES NO

Board of Directors: # serving _____ term length: _____ frequency of meetings: _____

standing committees: _____

- Percentage of Board members who make personal gifts _____ %
- Do you have Whistleblower and Conflict of Interest policies in place for the Board? YES NO
- Do you have a formalized onboarding process for board members? YES NO



AIM for Excellence Award Competition
Part One Application Fact Sheet & Supporting Documents

Operations: year began operations: _____ fiscal year dates: _____

most recent fiscal data: _____

total revenue: _____ total expenses: _____ surplus / deficit: _____

mission statement:

organizational description (50 word limit):

primary service area (geographic) or operating locations:

required supporting documents:

- 1. IRS tax-exempt 501(c)(3) nonprofit organization designation letter
- 2. Most recent audited financial statements (including any management letter or other recommendations)

***Note:** If the audit for the recent fiscal year is not complete by the February 1, 2017 deadline, applicants may use the previous fiscal year's audit and current year's unaudited financial statements. If you organization does not have an audited financial statement, please provide the most recent financial statements.*

- 3. Most recent Form 990, including all schedules, filed with the IRS
- 4. Budget for the current fiscal year
- 5. Board list, including affiliations
- 6. Senior or Management staff list or organizational chart

Applications lacking supporting documents will not be forwarded to the Selection Committee for consideration.



AIM for Excellence Award Competition Part One Application Questions

Character limit: Responses for each question are limited to 5,000 characters including spaces.

For ALL questions: If your organization has any particularly innovative practices from which other organizations might learn, please describe those practices in your responses.

Question 1: How does your organization plan for its future?

Who is involved with any planning you undertake, and what processes do you employ? How are diverse perspectives and stakeholder input incorporated into these processes? What have been the results of the organization's planning efforts? What are the management implications of your organization's planning work, as opposed to programmatic implications?

Question 2: What systems or practices has your organization put into place to ensure effective financial stewardship, stability and sustainability?

Please address practices in such areas as internal controls, budgeting, financial planning, and reporting. Describe the composition of your organization's various revenue sources. Address how your organization's revenue sources align with its mission.

Question 3: Briefly describe no more than three (3) specific management practices or strategic approaches at your organization that merit consideration for an award recognizing excellence in organizational management.

Be mindful that responses focusing on programmatic implementation are discouraged.

Congratulations! This completes the Part One application.

Email Application and Supporting Documents by February 23, 2018 to:

Taylor Strange
taylors@nonprofitadvancement.org

or postmark by February 23, 2018 and send by mail to:

AIM for Excellence Award Competition Selection Committee
Center for Nonprofit Advancement
1666 K Street, NW, Suite 440
Washington, DC 20006