

Achieving Excellence 13 application

Part A: Intro and About You



FYI only---must complete
AE application 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 co-commitment letters. The *NeighborWorks Achieving Excellence Program* (Achieving Excellence, AE) is comprised of people and organizations working to benefit their communities, including different lines of business, organizational sizes, participant races and ethnicities and backgrounds, strengths and weaknesses. Your honest responses will help us select a 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 you to refer to will be available at www.neighborworks.org/ae.

Once you have provided your introductory information on the first page, you will also be able to save your responses and return to the application at a later date and time. If you do this but don't receive the link to get back in, contact AEprograms@nw.org.

Reminders:

- * Organizations need NOT be members of the NeighborWorks network to participate.
- * No degrees (college, high school, middle school, etc.) are necessary to participate in AE! Your life experience matters.

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

Complete applications must be received by the deadline.

The deadline is 11:59pm Eastern time on Thursday, October 8, 2026

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 **December 11, 2026**.

Your name:

If different from above, nickname you prefer to be called

Your email address *

Organization *

Title

Mailing address

(Note: this does not necessarily need to be your office address. As many people work from home and sometimes different offices, please just provide whichever is the address you would like to receive materials. We will NOT use this for any junk mail--it is only used if you are in the program and we need to send reading materials, etc.)

City

State

Zip

Phone Number

Early heads-up about letter and essays

We want to note two things now so that you can begin thinking about them as you work your way through the rest of the application.

1.) **Co-commitment letter:** A required part of the application is a "co-commitment" letter from your board if you are a CEO/ED or from your CEO or relevant supervisor if you are in a different leadership position in the organization. We will ask a little more about this later in the application, but we want to note it now so that you can make the request of your letter-writer sooner rather than later. If you want to access the instructions and send them to your letter-writer, you can find them [here](#).

2.) You will also have the opportunity to submit a reference letter from another professional colleague if you would like, but this is optional. There is not a separate sheet of instructions for that--the instructions are included in the description below.

3.) **Essays:** The essays will ask you to describe one of the most critical issues facing you in your work. It is described more in the essay section, but you may want to look ahead to those pages or at least start thinking about that.

Optional: Demographic questions

These next 3 questions are optional. Please answer as you are comfortable. NeighborWorks America would like to better understand how we are serving the broad diversity of people and organizations, who is applying for our program(s) and we want to look at our programs from multiple perspectives.

Race:

☐ American Indian/Alaskan Native

☐ Asian

☐ Black or African American

☐ Native Hawaiian/Other Pacific Islander

☐ White

☐ More than one race

☐ Prefer not to answer

Ethnicity--Latino:

☐ Hispanic

☐ Not Hispanic

☐ Prefer not to answer

How do you identify your gender?

☐ Female

☐ Male

☐ Other

☐ Prefer not to answer

Your Organization

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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?

Which best describes your organization?

- ☐ Nonprofit
- ☐ Public sector/government
- ☐ Quasi-governmental
- ☐ For-profit/private sector
- ☐ Other:

When was your organization founded?

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.)

From that answer, please choose the option that best describes the size of your core operating budget:

- ☐ <\$750,000
- ☐ \$750,000 to \$2 million
- ☐ >\$2 million

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

In what NW region is your organization?

Northeast
Southern
Western
Midwest

The Work You Do

In the next several questions, we are trying to get a sense of the work you and your organization do. Please provide the most accurate answers you can, but there is no need to spend time trying to get an *exact* answer--you can use round numbers and/or reliable estimates.

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

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%)



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.

(e.g.:

Rural 100%

or

Urban 50%

Suburban 50%)



What is your organization's current staff size?

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

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

Part A4: Your Role in Your Organization

How long have you been with this organization?

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

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.

Attachments

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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 AEprograms@nw.org No need to email if you have attached it here.

Browse...

(untitled)

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

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 AEprograms@nw.org No need to email if you have attached it here.

If you do not have a CV or resume or bio, please see the next question.

Browse...

If you do not have a CV or resume to add, you can include here a link to a LinkedIn page or other page where we can learn more about you

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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? *

Have you previously applied to participate in AE?

☐ Yes

☐ No

Has anyone from your organization participated in Achieving Excellence?

☐ No

☐ Yes--Please list name(s):

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

Program Expectations & Lessons Learned

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.

Achieving Excellence is a very intensive program that requires significant time and focus. We encourage you to thoughtfully consider your commitments and capacity to ensure you can fully engage throughout the program's duration. We have found through the years that being in AE at the right time for you will yield significantly greater results. Of course the unexpected will occur and opportunities will arise—a promotion, great job opportunity, starting or growing your family. Those are wonderful parts of life and parts of the program.

Examples of planned events that we have found may interfere with your ability to participate include running for elected office, an extensive sabbatical, actively looking to leave your current job, retirement in the next few years, etc. If these examples or something similar might apply to your situation yet you still think this is the optimal time for you to participate in AE, please share any information you can to help us better place you in the program and in a peer group, should you be accepted. Please be assured that your information will be kept confidential.

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

*

****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 3 one-week modules with our executive education partner, including teaching, meals, lodging during the executive sessions 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, specific direct costs for which you would be responsible include but are not limited to:

- **Tuition:** TBD--tuition will be posted soon (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 in Boston, MA
 - 1 meeting most likely in Washington, DC
 - 3 meetings 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 62-72% 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.

The specific dates listed below are all confirmed (though always subject to change of course due to the life we learned about during the pandemic, funding changes, etc.) but we do not anticipate any changes at this time. For the dates listed below as windows of time, you will have some say in the dates and locations of those meetings.

Event	Online or in person?	Date and Time
Introduction & Orientation, Part 1	Online	February 3, 2027—2-4:30pm Eastern
Introduction & Orientation, Part 2	Online	February 10, 2027—2-4:30pm Eastern
Harvard Module 1	In person-- Harvard University	February 21 (<i>travel day</i>) – February 26, 2027 (<i>end in early afternoon</i>)
1st Peer Group Meetings (<i>Peer Group Meeting A</i>)	At the site of one of the peer group members	~2 days between April 5 – 23, 2027 <i>The exact dates & location will be agreed upon by you with your peer group & coach</i>
Summer Peer Group Meeting (<i>Peer Group Meeting B</i>)	In person-- probably Washington, DC	June 15-17, 2027

Harvard Module 2-- <u>ONLINE</u>	Online	September 26 (<i>travel day</i>) – October 1, 2027 (<i>end in early afternoon</i>)
Winter Peer Group Meetings (<i>Peer Group Meeting C</i>)	At the site of one of the peer group members	~2 days between January 3-21, 2028 <i>The exact dates & location will be agreed upon by you with your peer group & coach</i>
Harvard Module 3	In person-- Harvard University	February 27 (<i>travel day</i>) – March 3, 2028 (<i>end in early afternoon</i>)
Final Peer Group meetings (<i>Peer Group Meeting D</i>)	At the site of one of the peer group members	~2 days between April 24 – May 12, 2028 <i>The exact dates & location will be agreed upon by you with your peer group & coach</i>

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.

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

☐ Other:

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

☐ Yes

☐ No

☐ Other:

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

☐ Other:

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** and b.) participate fully in each and every in-person session, coaching call and otherwise whole-heartedly participate in the program? *

☐ Yes

☐ No

☐ Other:

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

☐ Other:

If your answer to any of those is "no", then please feel free to set up a call to discuss by emailing AEprograms@nw.org 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.

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?



In your role within the organization, how do you ensure that all individuals, regardless of their background or life experiences, have opportunities to succeed and feel valued? How has your approach impacted how you manage and lead?



Part D: Essays

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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.

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 ensuring that you hear the voices of and involve relevant stakeholders, and maybe not just the same

people from whom you always hear?

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
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FYI only--must complete
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Applicants are asked to provide a **co-commitment letter**.

- Applicants who are CEOs/EDs should get a letter from the board of directors
- Applicants in other senior leadership roles should provide a letter from the CEO/ED or relevant supervisor

The co-commitment letter is intended to ensure that your organization understands what you are applying to and that they will be a part of the program along with you, though *you* are the representative that 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. Nevertheless, 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/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

Please click [HERE](#) to download the instructions to share with your letter-writer (board chair, CEO, supervisor).

As noted in the instructions, the letter-writer should send their co-commitment letter to AEprograms@nw.org.

As a reminder, we want all co-commitment letters submitted by the application deadline. However, we will allow a *few* extra days for those letters to come in.

Part E2: Additional, Optional Reference Letter

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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.

If you choose to have another letter submitted and IF it is appropriate for you, it is **strongly preferred** that this letter come from someone with whom you may be working on the performance challenge you outline in this application. 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.

If we cannot determine who the letter is about, it will not be included as part of your application.

REQUIREMENTS: There is no separate instruction sheet for this. Here are the requirements:

- The letter must **CLEARLY** state **YOUR NAME**
- The letter(s) should include the length of time the individual has known you and in what capacity
- The letter should be in PDF format if at all possible
- The letter should be sent to AEprograms@nw.org
- We would like to receive all letters by the application deadline. However, we will allow a few extra days to receive all letters.

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

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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:

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, contact AEprograms@nw.org to get access back into the application. It is not guaranteed you will be able to access your application again.

Thank You!

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Congratulations! Your application has been submitted.

Please be advised that this application and your attachments must have all been submitted **by the deadline: 11:59pm Eastern time on Wednesday, December 4, 2024** 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 February 15, 2025.

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!*

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CO-COMMITMENT LETTER

Strong support from you (the Board if your applicant is a CEO/ ED; and for others, from the CEO/ED and other senior management) is critical to the success of your organization in the NeighborWorks Achieving Excellence Program (Achieving Excellence).

As may be clear, this program requires an intensive commitment from the participant and the organization as a whole. It will bring changes to the organization and perhaps even major transformations. If accepted into the program, the applicant will be the organizational representative that attends the sessions, but the entire organization will be involved. Therefore, the commitment of board/senior leadership supporting the participant in this program is essential.

By the time you are writing this co-commitment letter, hopefully you are already familiar with the challenge that the person is presenting in the application. If accepted into the program, they will spend approximately the first three months crafting and honing that challenge into what we call a performance challenge, meaning that is something that is: critical to the success of the organization; firmly within that person's scope of authority; not something the person could accomplish alone—it requires multiple people or divisions working together, or community members, partner organizations, etc. because it is more of a 'learning' issue or cultural change that is required (an adaptive change), usually not a technical issue that could be accomplished simply with more time or more money or a consultant. It is not a "nice-to-have": it is something that the person would be working on every day anyway because it is critical to the success of the organization but by being in the program, they will have the support of an executive coach, peers and new ideas and lessons, with some of the sharpest minds in the sector. This is not a remedial program to help a struggling manager improve their basic skills or even their leadership skills; this program is for high-performing organizations to focus even more on outcomes and results, and to take the organization to a higher level of success.

Note that we are not asking for a "nomination letter" or "reference letter"—*we are seeking your commitment to the work that the organization will undertake as part of this program and your support of the CEO/senior leader as he/she does so.*

Anonymity & Honesty

We are seeking candid responses to the questions below and an even-handed assessment of your applicant'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.

Considerations Before Committing

- ✓ We have discussed the challenge the applicant is including in their application and we agree it is a critical issue for our organization, and is within this applicant's scope of authority
- ✓ *This applicant* is the person we want working to tackle the challenge and *this is the person* best equipped to do so
- ✓ We view participation in the NeighborWorks Achieving Excellence Program as a way to support the leadership of a highly effective executive
- ✓ For the most part, we have the staff and board leadership in place who meet our present and near future needs
- ✓ Our organization has sufficient financial resources to maintain sustainability and to meet its commitments in the short to mid-term.
- ✓ Among the board, executive and management teams there is a high degree of alignment about goals and strategy (or at least *healthy* discussions about the direction we want to go)
- ✓ We do not see any significant threat to organizational sustainability in the near term.

Considerations if Applicant is Accepted to Participate in AE

If the applicant participates in the program, we (the organization) will:

- ✓ Welcome this opportunity to strengthen our governance and/or leadership team and to model honest and useful communication even when the going gets tough. To realize adaptive challenges, the participant may need to raise difficult issues with you. Please consider how you can work to create a "safe space" for this conversation – perhaps being explicit about it.
- ✓ Discuss and reach agreement on ways our team can provide support to the AE participant during the course of the program to ensure we achieve our Performance Challenge
- ✓ Knowing that the challenge will likely evolve or completely change from what is in the application, we will commit to working with the participant through those iterations to ensure that, together, we are truly addressing the cause of the issue and not the symptoms, we will ensure the challenge is one of the most critical issues to the success of the organization in the mid to long term, and is firmly in this person's scope of authority
- ✓ Authorize the participant(s) to make transformational change in our organization as appropriate
- ✓ Ensure that all relevant parties—whether the full staff, or a partner organization, or senior leadership, etc.—knows that this person has our full support in pursuing this challenge
- ✓ Encourage open communication and specific feedback about what we can do—or stop doing—to be more helpful in supporting performance challenge goals
- ✓ Check in with the participant(s) on their progress
- ✓ Encourage and support their ongoing learning and growth
- ✓ Allow time and space for their performance challenge work and coaching calls
- ✓ Try to help this person bring back the lessons from Achieving Excellence to share with the rest of us in the organization. If that is too difficult, we will commit to sharing the lessons more deeply in the organization when the participant completes their official time in the program.

INSTRUCTIONS

There is no specific required format. You can send an email, attach a letter on letterhead, whatever is easiest for you.

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.

REQUIREMENTS

REQUIRED

1. Please **VERY CLEARLY** include in the letter/email:
 - **YOUR NAME**
 - **Your role in relation to this applicant** (e.g., you are the in-coming board chair, you are the CEO)
 - **THE APPLICANT's NAME**
2. **TITLE:** For the title of the document or the subject of the email, please use this naming protocol: **NomineesLastName_NomineesFirstName_Nomination—YourName** (for example, Smith John—Co- commitment—Sally Jones)
3. **Submit by email to** aeprograms@nw.org (you can also use this contact if you have any questions)

PREFERRED

We prefer the email is sent directly from you (your email address) if possible.

If you send an attachment, please send it in PDF format if possible.

Please also include in your letter/email 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. Specifically, they should have enough authority in the organization that they are able to lead transformative change.
- 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 that you agree is one of the most important issues facing the organization in the mid- to long-term

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.

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