**Best Year Yet Foundation Grant Application**

**Date:**

**Organization name:**

**Location (city/state/country):**

**Years of operation:**

**Organization bio:**

**Link to website:**

**Organization contact:**

**Best Year Yet® Sponsoring Partner:**

**How do you think this organization fits with the mission of the Best Year Yet Foundation? (maximum 100 words)**

**Services requested (place check mark by all that apply)**

\_\_ Fast Track team plan

\_\_ Fast Track team plan with individual plans for team members

\_\_ Raise the Bar facilitated session for groups (creating individual plans)

\_\_ Individual plan for 1:1 coaching

\_\_ Other (please specify)

**Additional information:**

**Best Year Yet Foundation Requirements for Grantees**

As a Best Year Yet Foundation grantee, you agree to provide specific data and materials to help us continue to improve and share Best Year Yet® programs and services with organizations around the world. Requirements include:

* A pre-session survey of all participants (due prior to any Best Year Yet work with the organizations – if applicable).
* Quarterly surveys for updates and additional information (due dates to be determined based on monthly review schedules - usually takes 5 minutes or less to complete - if applicable).
* A case study of your organization and its work with Best Year Yet Foundation and the Best Year Yet® programs in which you participate (following the format provided in the Best Year Yet Foundation Case Study Form, due within 30 days of the final monthly review date).
* Video testimonial of organization Director/CEO (due within 30 days of the initial session - if applicable).
* Permission to use the organization’s name in marketing and outreach (form provided, due as part of the application process).

**OPTIONAL (but really appreciated):**

* Where possible, photos of the group and/or individuals taking part in the session, including completed photo/video releases (provided to you) giving permission for us to use them in our marketing and outreach (due within 30 days of the session).

The signatures below signify agreement with these terms.

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Sponsoring Partner Date

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Organization Representative Date

**Photo/Video Release Form**

I, **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**(please print), grant permission to Best Year Yet Foundation and its agents and employees the irrevocable and unrestricted right to reproduce the photographs and/or video images taken of me, or members of my family, for the purpose of publication, promotion, illustration, advertising, or trade, in any manner or in any medium. I hereby release Best Year Yet Foundation and its legal representatives for all claims and liability relating to said images or video. Furthermore, I grant permission to use my statements that were given during an interview or guest lecture, with or without my name, for the purpose of advertising and publicity without restriction. I waive my right to any compensation.

I acknowledge that I am **[ ]** over the age of 18 **[ ]** the legal guardian of the following If legal guardian of model(s), please list name(s) of model(s) here:

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Guardian:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Best Year Yet Foundation Case Study Guidelines**

We appreciate you sharing your Best Year Yet story with us. Below are the 4 sections of information we would like for you to include on your case study, with suggestions for the types of information we would like you to include. In addition to the case study examples used in each section below, here are also many examples on our website at <http://bestyearyet.com/results/case-studies.html> that can provide inspiration as you consider how to tell your own story.

**Section 1 - The Situation***Describe the situation of the client that existed before beginning to use Best Year Yet in their program. Include the following:*

* Organization name, location (city, state, country)
* Industry and Population served
* Number of clients served per year
* Challenges that the organization was facing such as employee burnout and turnover, financial trouble, staff not working well together or uniting on goals, process problems within the organization, not being able to leverage income sources, funding issues, board support, and/or opportunities that could move the organization forward, other challenges that were holding them back.
* Opportunities and assets that were not being leveraged to full capacity.

***THE SITUATION EXAMPLE: Becoming a High-Performance Team***

*A new direct marketing division was formed as part of an insurance company that had been operating in the UK for more than 100 years. Fifteen people ranging in age from 20 to 50 were given the challenge of generating a new income stream from existing relationships of the parent company.*

*The problem was that the new team had no direct access to the potential clients, who were merely told to contact a huge call center "if you should ever need insurance". The first aim was to generate more calls and the second was to transform those at the call center from "the people who answer phones" to those who knew how to respond in a way that converted inquiries to sales. And the team had no idea how to make it happen!*

*In addition, they had come together from parts of the parent organization in which personal responsibility for making things happen was a rare commodity*.

**Section 2 - The Work of Best Year Yet Foundation***Include items specific to the process including the following:*

* How and why the decision was made to bring Best Year Yet into the organization.
* Who was involved (such as Board of Directors, Management Team, all staff, staff of particular departments, volunteers, clients)
* Limiting Paradigm and New Paradigm
* Specific decisions that were made during the planning process that focused on identified pain points for the organization
* Any additional items that were powerful in the process
* What’s the one key takeaway from the entire experience

***RESULTS EXAMPLE:******Becoming a High-Performance Team***

*As the team was now responsible for all aspects of this new initiative - the quantity and quality of their performance -- everyone in the new business came together to review the challenges and make-a-plan to make it all happen. A breakthrough occurred when they committed to taking full responsibility for their results by giving up the right to blame the parent company for any issues that could stop them from getting the results.*

*They agreed key fundamental issues and started breaking down barriers to their achieving their plan. Many of these were resolved within the first year, but those that weren't stayed on the radar screen until they cracked them. At times the team leader needed to ask the team for more, even though there were no funds to pay them a bonus for doing so. We used a key lesson in our Producing Results program to help them re-energize and focus on longer-term objectives as well as day-to-day performance.*

**SECTION 3 - The Results***Talk about what changes were made over the year and what resulted from the work. Include items such as:*

* Specific money amounts or percentage of increases around financial goals
* How things turned around in terms of people working together, staff engagement and new talents/resources that were brought to the work
* Changes regarding organization culture
* Results related to the organization’s mission – client service increases and improvements, program expansions, health of the organization overall
* Improvements in morale, energy, enthusiasm
* Impact on the clients served and the overall community
* Examples of how challenges were overcome / resolved, acknowledging the difference your plan made

***RESULTS EXAMPLE: Becoming a High-Performance Team***

*When the team first came together, they were a cost to the organization. By the end of the first year, they had exceeded their sales target by 50% and were contributing 40% of the Added Value for the entire parent company.*

*The team has now expanded from 15 members to 22, and every member of the team has developed in such a way that he or she was given a promotion. Recently a top board member visited a planning and review session and proclaimed that this team achieved more in three hours than his board had achieved in five months.*

*Recently a downturn in the market has decreased performance in all parts of the organization - but this team, while obviously stretched by this environment, now sees the possibility that they'll be able contribute nearly 80% of the added value of the parent company this year.*

**Section 4 - Reach and Impact**

*Part of our mission with the Best Year Yet Foundation is to have positive impact on as many lives as possible through our programs. Please fill in the following with your educated guesses where specific numbers are not available:*

* Number of people who went through Fast Track team plan:
* Number of people who created an individual plan through Raise the Bar, self-guided online plan:
* Number of clients who benefited from the Best Year Yet work of the organizations through improved services, expanded programs, etc.:
* Number of people connected to the participants of those who went through the Best Year Yet programs such as family members, community members outside the client base, etc.

***REACH EXAMPLE: Becoming a High-Performance Team***

* *Fast Track Participants: 22*
* *Board Members: 11*
* *Family members affected by increases in team embers’ increased income and life balance: 72*
* *Other Parent Company Staff benefiting from the increase in profit and stress reduction from the work of this team: 283*
* *Clients better served as a result of changes: 600+*

 ***Total Reach for direct impact: 988***