



Association of Public Treasurers of the United States and Canada

Dr. Jackson R.E. Phillips Award **Information, Criteria & Application**

PURPOSE

The Dr. Jackson R.E. Phillips Award, instituted in 1980, was designed to annually recognize one APT US&C member who has demonstrated professional leadership, made a significant contribution to the management of public funds and leadership development, or has increased innovative programs in the management of public funds.

- Dr. Jackson R.E. Phillips was a man whose dedicated interests were the principles of leadership development and innovative improvements in the management of public funds, which are so extremely vital to the efficiency of governments.
- The judges of the application are three or more APT US&C members who make their ratings independently of each other, but whose combined numerical ratings are used to determine the award winner. The chairman of the committee is the previous year's winner of the award. Only the judges and the Executive Director of APT US&C know the identity and number of nominees.

AWARD PRESENTATION

The recipient is announced at the APT US&C Annual Conference. The Chairman of the Dr. Jackson R.E. Phillips Award Committee makes the formal plaque presentation. All other applicants are urged to re-submit applications for future awards.

NOMINATIONS

All active APT US&C members are eligible for nomination. Nominations may be made by a state or provincial MTA, a public body, other active APT US&C members, or through self-nomination. As the Dr. Jackson R.E. Phillips Award is presented at the APT US&C Annual Conference, individuals either self-nominated or aware of their nomination by another party are strongly encouraged to attend the conference.

EVALUATION PROCESS

The Dr. Jackson R.E. Phillips Award Committee is responsible for evaluating nomination submissions. The Committee is chaired by the most recent recipient of Award and is comprised of three or more long-standing APT US&C members. Committee members independently evaluate candidates, and combine evaluations to determine the Award winner. The following are the criteria by which nomination submissions are judged:

- Practicality, originality, and cost efficiency of the innovation(s)
- Value to the government, both present and future
- Value to the treasury management profession
- Clarity of presentation
- Other considerations, such as timeliness of innovation(s), may contribute to the Committee's final decision.

APPLICATION

Submit this application to info@aptusc.org.

SUBMISSIONS MUST BE RECEIVED NO LATER THAN MAY 30

Applications are confidential. For more information regarding the Dr. Jackson R.E. Phillips Award, please contact APT US&C at info@aptusc.org or 989-820-5205.

www.aptusc.org

Post Office Box 591 · Tawas City, MI 48764-0591 · info@aptusc.org · 989-820-5205



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GUIDELINES FOR SUBMISSION

Submissions must include a brief professional biography and professional accomplishments for which the Dr. Jackson R.E. Phillips Awards is recommended. The criteria of judging applications are:

A. Leadership in Management of Public Funds (25 points)

Demonstrated initiatives or actions that have resulted in important savings or increased effectiveness in the use of public funds, time, materials, personnel and equipment.

B. Significant Contributions to Management of Public Funds (25 points)

- a. Implementation of innovative programs
- b. Exceptional efficiency
- c. Outstanding accomplishments in such areas as
 - i. Cash budgeting
 - ii. Investment practices
 - iii. Collection and deposit practices
 - iv. Debt management practices
 - v. Accounting, reporting and internal controls
 - vi. Automation of treasury functions

C. Specific activity or activities which evidence the highest traditions of professionalism (50 points)

- a. Its purpose(s) and significant contribution
- b. Methods used
- c. Its relationship to previous work attempted in this area (if this is a new area, please describe)
- d. Names of cooperating individuals, departments or agencies
- e. Its beneficial impact on public government expressed in terms of cost savings, expanded services, decreased time requirements, and increased management capabilities
- f. Its beneficial impact on citizens of government



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of the United States and Canada

Dr. Jackson R.E. Phillips Award Application

Nominee

Name _____

Title _____

Address _____

Email _____

Phone _____

Employment History _____

Education (Degree) _____

Professional Involvement _____

Certification(s) (if known) _____

Awards/Recognition (if known) _____

Nominator

Name/Title _____

Organization _____

Address _____

Email _____ Phone _____

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Accomplishments of the Nominee

Provide a complete description of the accomplishment(s) for which the award is recommended, citing specific recognizable results rather than opinions or conclusions, reflecting current or relatively recent accomplishments rather than overall duties performed over a long period of years. Appropriate documentation and exhibits are desired. Refer to criteria included in this form for additional guidance. Use this form or attach additional pages.

Leadership in Management of Public Funds

Significant Contributions to Management of Public Funds

Specific activity or activities which evidence the highest standards of professionalism

Letters of Support may be included from individuals who are familiar with the nominee and the activities cited.

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