



2023
WESTON AWARD
NONPROFIT EXCELLENCE

**APPLICATION FOR THE JOEL A. & CLAUDETTE B. WESTON AWARD FOR EXCELLENCE IN
NON-PROFIT MANAGEMENT**

AGENCY INFORMATION

Agency Name: _____

Contact Person: _____

Title: _____

Address: _____

City, State, Zip: _____

Phone Number: _____ E-Mail Address: _____

APPLICATION GUIDELINES

1. **Applications that are incomplete or do not follow the instructions will not be reviewed.**
2. Fully, yet concisely address each question in the space provided or indicated.
3. Provide all requested documents electronically and arrange them in this order:
 - a) Application
 - b) The most current agency audit (must include management letter and notes/conditions) and Form 990
 - c) The most current board-approved financial report
 - d) List of board members, board committees and description of how business is presented to the board
 - e) The current Strategic Plan and review
 - f) One or two examples of marketing (pdf version is acceptable)
 - g) By-laws
 - h) IRS tax-exempt letter
 - i) Solicitation license
 - j) Personnel policies
4. Submit an electronic copy of the application and attachments in PDF format no later than **12:00 PM, Wednesday, April 5, 2023** to noelle@westonaward.org. Please note that each attachment needs to be separate PDF document.

SECTION 1: MISSION AND OVERVIEW (ONE PAGE)

Noting the response space limitations, please respond to the following:

1 Give a brief profile of the agency. Include mission statement, target population, programs and total number of people served during the last calendar year.

2 Why do you believe your organization exemplifies excellence in non-profit management?

3 In 300 words or less, provide a recent client success story that is tied to excellence in agency management. How?

SECTION 2: FINANCIAL MANAGEMENT (ONE PAGE)

- 1 What internal controls are in place to safeguard the agency's fiscal integrity?
- 2 Has the agency operated within the budget for the past three years? If not, why?
- 3 What is the board's policy regarding operating reserves?
- 4 Describe the agency's fundraising practices.

5 As detailed in your 990, what percent of agency revenue is specifically spent for agency's client services/programs?



SECTION 3:

PERSONNEL MANAGEMENT (ONE PAGE)

- 1** How are staff and board roles and responsibilities defined?
- 2** How is information communicated within the agency?
- 3** How is board information communicated within the agency?
- 4** How are volunteer resources recruited and utilized?

SECTION 4:

SERVICE PROVISIONS

NOTE: Due to the amount of information requested in this section, up to three pages may be used.

- 1** How does your agency identify and assess client/community needs? Who do you partner with to assess these needs? How is the information utilized?
- 2** Describe your agency's strategic planning process. How often does it occur? Who is involved? How is the plan utilized during the year? How have programs and services been enhanced as a result of implementation of the plan?
- 3** How does the agency monitor its strategic plan?
- 4** How does the agency monitor its client confidentiality agreement and ensure compliance?
- 5** How does the agency solicit and receive feedback/input from clients?
- 6** Is the agency accredited by a national/state organization? If so, by whom?
- 7** Has the agency lost accreditation from a state/national organization? If so, describe?
- 8** Is there any pending litigation filed against the agency? If so, describe.
- 9** Describe how your agency's management supports and enhances the mission and delivery of services.

SECTION 4:
SERVICE PROVISIONS (PAGE 1 OF 3)



SECTION 4:
SERVICE PROVISIONS (PAGE 2 OF 3)



SECTION 4:
SERVICE PROVISIONS (PAGE 3 OF 3)



SECTION 5:

MARKETING (ONE PAGE)

- 1 How are marketing tools developed for the agency?
- 2 How are marketing tools utilized and who is your target audience?
- 3 How does the agency reach potential clients/consumers?
- 4 Are there any language barriers in communicating with your clients? If so, how are they overcome?

SECTION 6:

SIGNIFICANT ACHIEVEMENTS (ONE PAGE)

1 Describe any professional honors, special recognition or awards received by the agency in the last three years.

2 Describe any recent commendation or above average ranking from an accrediting organization.

3 Describe any additional milestones or achievements the agency has reached. Include any examples of management practices that have enhanced effectiveness or created significant results or efficiencies.

SECTION 7:

AGENCY EFFECTIVENESS (ONE PAGE)

1 What changes in people’s or families’ lives does the agency aim to achieve and how do you know the programs are achieving the intended results?

2 Provide at least one “lesson learned” as a result of reviewing agency results.

3 What research or experience from other communities has helped shape your program design and implementation?

4 List and describe collaborative efforts (beyond making referrals) with other non-profits and/or for-profits during the last three years.

SECTION 8: GENERAL QUESTIONS (PAGE 1 OF 2)

1 Are there any management conditions cited by the independent auditor?

Yes No

2 Are financial statements prepared monthly?

Yes No

3 How often does the board review financial statements?

4 What was staff turnover as a percentage of overall staff, for the past two years? Briefly describe.

5 How long has CEO/Executive Director been in their position?

6 What is the composition of the staff and board?

STAFF COMPOSITION	MALE	FEMALE	TOTAL
Asian/Pacific Islander			
Black/African American			
Hispanic/Latino			
Native American			
White/Caucasian			
Other (please specify)			

BOARD COMPOSITION	MALE	FEMALE	TOTAL
Asian/Pacific Islander			
Black/African American			
Hispanic/Latino			
Native American			
White/Caucasian			
Other (please specify)			

SECTION 8:

GENERAL QUESTIONS (PAGE 2 OF 2)

7 Is there client representation on the board? If so, how are they selected?

8 Does the board and its officers follow a procedurally set term length? How many new board members were added in the past three years?

9 What was the average number and percentage of total board members in attendance during the last calendar year? How many board meetings were held during the last calendar year? How many executive committee meetings were held in that time?

10 How many board members are directly involved in fundraising?

11 Has the board conducted a formal self-assessment within the past two years? What items were addressed in the self-assessment?