



**APPLICATION FOR THE JOEL A. & CLAUDETTE B. WESTON
AWARD FOR EXCELLENCE IN NONPROFIT MANAGEMENT**

AGENCY INFORMATION

Organization Name

Name

Title

Address

Phone Number

Email Address

Website

Executive Director/CEO Name

CEO Years in Current Role

Email Address

Application Instructions

Thank you for your interest in The Joel A. & Claudette B. Weston Award for Excellence in Nonprofit Management. The Weston Award recognizes, affirms, encourages and financially supports the best run charitable organization in Forsyth County as selected every other year by the Weston Award Committee. The Award is a comprehensive evaluation of all aspects of nonprofit management. In filling out the award application, nonprofit organizations can assess and receive feedback on how their agency measures up against best practices in human service agency management. The award promotes efficiency, competence, governance, fiscal integrity, innovation and program effectiveness. Nonprofit management excellence in turn equates to a community that can better help its most vulnerable citizens, maximize philanthropy and enhance quality of life for all.

Applications that are incomplete or do not follow the instructions will not be reviewed. Fully, yet concisely address each question in the space provided or indicated.

If you have questions about eligibility or the application, please contact Noelle Stevenson at noelle@westonaward.org. Applications are due by 5:00 pm EST on **Friday, February 21, 2025**.

Once you're ready to begin the application (you've determined what information you need), allow at least an hour to complete. Also, you may save your work and complete the application at a later time.

Are you ready to begin? Please be ready to attach the following:

- The most current agency audit (must include management letter and notes/conditions) and Form 990
- The most current board-approved financial report
- List of board members, board committees and description of how business is presented to the board
- The current Strategic Plan and review One or two examples of marketing (PDF)
- By-laws IRS tax-exempt letter Solicitation license Personnel policies

SECTION 1: MISSION AND OVERVIEW

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 nonprofit management? (Please make sure to illustrate 2 - 3 examples of how your organization excels in leadership, governance, management and innovation.)

3. Provide a recent client success story that is tied to excellence in agency management. How?

SECTION 2: FINANCIAL MANAGEMENT

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. Budget Size

	Current Fiscal Year	Previous Fiscal Year
Size of annual operating budget:		
Endowment:		
Cash reserves:		

4. Percentage of total budget, largest single grant/donation by source and total number of grants from each source (use the most recent fiscal year for which complete data are available.):

	% of total budget (This column should add up to 100%.)	largest single grant/donation	Total number of grants from each source.
Foundation grants			
Corporate donations			
Individual donors			
Government grants			
Earned income			
Other (specify source below)			

5. Percentage of total budget, how funds are allocated across different categories (use the most recent fiscal year for which complete data are available.):

	% of total budget (This column should add up to 100%.)
Program Services	

	% of total budget (This column should add up to 100%.)
Fundraising	
Administrative/Operating Costs	
Salaries	
Grants to Other Organizations	
Other (specify source below)	
Marketing and Communications	
Volunteer Support	
Other (specify below)	

6. What is the board's policy regarding operating reserves?

7. Describe the agency's fundraising practices.

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

SECTION 3: PERSONNEL MANAGEMENT

- 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? (Please be specific about the difference between program volunteer activities and board volunteer activities.)**

SECTION 4: SERVICE PROVISIONS

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? What process do you use to determine priorities for the organization and keep track of your progress?

4. Describe how your strategic plan demonstrates that your organization is likely to emerge as a sector leader in the next five years.

5. How does the agency monitor its client confidentiality agreement and ensure compliance?

6. How does the agency solicit and receive feedback/input from clients?

7. Is the agency accredited by a national/state organization? If so, by whom?

8. Has the agency lost accreditation from a state/national organization?

Yes No

Please describe.

9. Is there any pending litigation filed against the agency?

Yes No

Please describe.

10. Describe how your agency's management supports and enhances the mission and delivery of services.

SECTION 5: MARKETING

- 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

- 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

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. Please include the most important metrics (internal and/or external) used by your organization to measure your impact (specify dates). You may list up to five. The metrics you share should tie to the organization's mission.

Note: These metrics should be for results completed, not just what is projected. Include specific results for most recently completed fiscal year and compare with previous year (e.g., 75% of all clients experienced an improvement of x amount in 2024 which represented an increase of 20% over 2023.) You should include a point of comparison for all metrics as indicated in the example.

3. Provide at least one "lesson learned" as a result of reviewing agency results.

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

5. 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

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

Yes No

Describe the management conditions.

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. What is the composition of the staff?:

	Male	Female	Non-binary	Total
Asian/Pacific Islander				
Black/African American				
Hispanic/Latino				
Native American				
White/Caucasian				
Other				

6. What is the composition of the board?:

	Male	Female	Non-binary	Total
Asian/Pacific Islander				

	Male	Female	Non-binary	Total
Black/African American				
Hispanic/Latino				
Native American				
White/Caucasian				
Other				

7. Is there client representation on the board?

Yes No

How are they selected?

8. Briefly describe your organization's term limit policy for board members below. If there are no term limits, please explain below.

9. Board roles and participation

	Number (#)
New board members added in the past three years.	
Board meetings held during the last calendar year.	
% of total board members in attendance during the last calendar year.	
Executive committee meetings during the last calendar year.	
% of total board members directly involved in fundraising.	
% of total board members that made a financial contribution during the last calendar year.	

10. Briefly describe your organization's giving policy for board members below. If there is no giving policy, please explain below.

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

12. Briefly describe your organization's succession plan below. If there are no succession plan, please explain below.

13. If your organization wins this award, what management or organizational topics do you believe are a priority to address?

REQUIRED ATTACHMENTS

1. The most current agency audit (must include management letter and notes/conditions) and Form 990.

2. The most current board-approved financial report.

3. List of board members, board committees and description of how business is presented to the board.

4. The current Strategic Plan and review.

5. One or two examples of marketing.

6. By-laws.

7. IRS tax-exempt letter.

8. Solicitation license.

9. Personnel policies.

After you have completed the entire application and have uploaded the required documents, please sign below and click submit. Thank you for your application!

Signature