



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 Committee is chaired by the Immediate Past President who is responsible for recruiting the most recent award recipient and members of the Advisory Committee to serve on the Award Committee. Only the Chair, Committee and Executive Director of APT US&C know the identities of the 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 active Affiliate Association, 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. Committee members independently evaluate candidates, and combine evaluation scores to determine the Award Recipient. 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

The online application is available by visiting the APT US&C website [here](#).

SUBMISSIONS MUST BE RECEIVED NO LATER THAN JUNE 30

Submissions 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.



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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 Award 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



Association of Public Treasurers
of the United States and Canada

Dr. Jackson R.E. Phillips Award Application

Submit by June 30, 2026

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 _____

Accomplishments of the Nominee

Provide a detailed description of the accomplishment(s) for which the award nomination is being submitted. Please include specific and measurable results, achievements, or impacts rather than general opinions or broad statements of responsibility. Nominations should emphasize current or relatively recent accomplishments, rather than duties performed over an extended period of time.

Supporting documentation and exhibits are encouraged and may be attached to strengthen the nomination as well as letters of support. Please refer to the award criteria included with this form for additional guidance. Additional pages may be attached if necessary.

Leadership in Management of Public Funds

www.aptusc.org

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