



## P2F2 Award Program

P2F2 has an award program that consists of three separate awards. The program was established to encourage high standards of performance, drive continuous improvement, promote innovation and leadership, motivate continued excellence, provide acknowledgment of contributions made by P2F2 members, and strengthen our P2F2 professional network.

All three awards are given to P2F2 members for their individual effort. The three awards are:

- Excellence in Retirement System Financial Management Award
- Retirement System Innovation Award
- Lifetime Achievement Award

The criteria for each award is provided in separate sections below.

### **Judging**

The selection committee will review nominations and make selections based on how well the nominees excel in one or more of the criteria listed for each award. A nominee does not need to excel in each of the criteria, but the more, the better! The selection committee will determine whether each of the awards will be granted in any given year and may decide to give one award to more than one person.

### **Eligibility**

Nominees must be P2F2 members in the year in which they are nominated. Retirees may receive the award in the year in which they retire, if they were active members at some point during the year.

### **Nomination Procedure**

Nominees may be self-nominated or be nominated by colleagues. Nominators do not need to be P2F2 members to nominate a P2F2 member for the award.

The nomination period runs from January 1<sup>st</sup> through June 30<sup>th</sup> each year. Nominations will be reviewed, and award winners will be announced at the annual P2F2 conference, generally held in October.

Nomination forms are available on the P2F2 website, and links to the forms are provided in each award section of this document.

## Excellence in Retirement System Financial Management Award

The Excellence in Retirement System Financial Management Award is intended to recognize an individual who has demonstrated sustained outstanding financial management with their system.

### Criteria

Applicants are invited to demonstrate outstanding achievement in **one or more** of the following areas:

1. **Financial Performance:** The nominee has developed and/or implemented effective strategies for managing and mitigating risks and the system consistently receives clean audit reports
2. **Operational Efficiency:** The nominee has helped the system implement streamlined and effective processes for managing retirement funds
3. **Governance and Accountability:** Best practices in governance are followed, and the nominee provides a high level of transparency in reporting and communications
4. **Communication and Education:** The nominee maintains high levels of satisfaction among stakeholders and is known as an effective communicator and educator
5. **Leadership:** The nominee shows strong and effective leadership in managing the financial operations of the system, provides effective collaboration and partnerships that enhance financial management practices, and has high ethical standards
6. **Adaptability:** The nominee adapts to changing economic and regulatory conditions effectively, especially during financial crises, economic downturns, or sudden regulatory requirements
7. **Accounting Data Management and Reporting:** The nominee provides timely preparation and submission of financial reports, has demonstrated the ability to analyze financial data to provide meaningful insights, and is committed to continuously improving accounting processes and practices
8. **Sustainability:** The nominee provides effective plans that sustain the retirement system long-term
9. **Social Impact:** The nominee has a positive impact on the community by engaging with stakeholders and developing support programs

### Nomination Form

Nominations can be submitted to P2F2 using any of the following four methods.

1. Use the following link to fill out an online nomination form using Survey Monkey:  
<https://www.surveymonkey.com/r/2TPSG3R>
2. Use the following link to download a Word document. Fill it out and email it to [admin@p2f2.org](mailto:admin@p2f2.org).  
<https://www.p2f2.org/files/Excellence%20in%20Retirement%20System%20Fin%20Mgt%20Award%20Nomination%20Form.docx>
3. Create and email a document to [admin@p2f2.org](mailto:admin@p2f2.org) that includes the nominee's name, the entity they work for, the award you are nominating them for, your name, today's date, and why you believe they should receive the award.

You may also send additional material if you think that would be helpful (i.e. examples of their work, reference letters from stakeholders, etc.).

# Retirement System Innovation Award

The Retirement System Innovation Award is intended to recognize an individual who developed and/or implemented an innovative technology or process that made an impact on the organization and/or the system's stakeholders.

## Criteria

Applicants are invited to demonstrate outstanding achievement in **one or more** of the following areas:

1. **Innovation:** The nominee made use of new innovative technologies or tools to improve financial management, designed and developed new processes or strategies that enhanced the financial health of the retirement system, or made effective use of accounting software and tools to manage financial data more efficiently.
2. **Concept:** The nominee developed or implemented an idea that was original and shows creativity, utilized new technology or old technology in a new way, or collaborated within or between departments to develop a new concept that led to improved efficiencies.
3. **Value:** The nominee's innovative idea provides value to the system, is cost effective (benefits outweigh the cost), and/or provides to the system's stakeholders.
4. **Impact:** The nominee's innovation has an immediate and/or long-term impact on the system and/or the system's stakeholders; it inspires future innovation and has potential to be adopted and used by other systems.
5. **Efficiency:** The nominee's innovation contributes to a more efficient and/or effective process.

## Nomination Form

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1. Use the following link to fill out an online nomination form:  
<https://www.surveymonkey.com/r/JZM8T9B>
2. Use the following link to download a Word document. Fill it out and email it to [admin@p2f2.org](mailto:admin@p2f2.org).  
<https://www.p2f2.org/files/Retirement%20System%20Innovation%20Award%20Nomination%20Form.docx>
3. Create and email a document to [admin@p2f2.org](mailto:admin@p2f2.org) that includes the nominee, the entity they work for, the award you are nominating them for, your name, today's date, and why you believe they should receive the award.

You may also send additional material if you think that would be helpful (i.e. examples of their work, reference letters from stakeholders, etc.).

## Lifetime Achievement Award

The P2F2 Lifetime Achievement Award is intended to recognize outstanding service and contributions to the public pension plan community over a long period of time. As noted in the criteria below, nominees must have worked with or for public pension plans for at least 25 years to be eligible for this award.

### Criteria

Applicants are invited to demonstrate outstanding achievement in **one or more** of the following areas:

1. **Longevity:** The nominee must have served the public pension community over a long period of time, at least 25 years.
2. **Achievements:** The nominee consistently exceeded expectations, demonstrated professionalism in attitude and work ethic, and developed creative and innovative solutions to problems that had lasting value.
3. **Service:** The nominee served on committees, teams or task forces for pension-related organizations, spoke at conferences or in front of stakeholder groups, and/or mentored other pension finance professionals.
4. **Contributions:** The nominee provided contributions of lasting impact to the system and/or to the profession as a whole.
5. **Leadership:** The nominee provided strong and effective leadership in managing the retirement system, created or served on high-performing teams with a commitment to excellence, and/or provided leadership to the pension community.
6. **Ethical:** The nominee consistently acted ethically, abided by the code of ethics and standards of practice, and encouraged colleagues to do the same.

### Nomination Form

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1. Use the following link to fill out an online nomination form:  
<https://www.surveymonkey.com/r/JTZ26QK>
2. Use the following link to download a Word document. Fill it out and email it to [admin@p2f2.org](mailto:admin@p2f2.org).  
<https://www.p2f2.org/files/Lifetime%20Achievement%20Award%20Nomination%20Form.docx>
3. Create and email a document to [admin@p2f2.org](mailto:admin@p2f2.org) that includes the nominee, the entity they work for, the award you are nominating them for, your name, today's date, and why you believe they should receive the award.

You may also send additional material if you think that would be helpful (i.e. examples of their work, reference letters from stakeholders, etc.).