



Excellence in Leadership Development

### 2022 Application – Edwin Toolis Memorial Award

Complete and return by 12 Noon, January 5, 2022 to michael@arista-advisors.com

1. What is your written mission statement?

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2. Do you have a written 5-year strategic plan?  YES  NO

3. Do you have a written business & communications plan?  YES  NO

4. List the officers, their titles, and current or former occupation?

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5a. How many total individuals does your organization serve on an annual basis?

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5b. How do you track this?

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6. What are your organization's top three initiatives for the current fiscal year and describe your progress to date?

1. 

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2. 

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3. \_\_\_\_\_  
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7. When was your last financial audit? \_\_\_\_\_

8. Please attach a copy of your last three years income statement with budget.

9. Please attach a copy of your 2021-22 budget.

10. Do you have an annual fund development plan?     YES             NO

If yes, please attach a copy.

In 200 words or less, tell us about your situation, including current internal issues. Define the successful outcome(s) you foresee after working with ARISTA Advisors. If awarded, how much are you requesting for the matching funds?

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(please continue on the back page if necessary.)

If awarded, we agree to openly participate and provide full disclosure in any diagnostic work with ARISTA consultants, staff, and subcontractors. Failure to provide full disclosure, delays in utilizing the funds in the award period or any breach of terms, may result in forfeiture. The information obtained is strictly confidential. We also agree to provide a testimonial letter on company letterhead and permit ARISTA Advisors to use our name and logo for promotional purposes.

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

(print) Full Name \_\_\_\_\_ Organization \_\_\_\_\_

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