

# National Association of Health Underwriters

## AWARDS LEADERSHIP GUIDE



America's Benefits Specialists

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## **Section 1: General Information about NAHU's Awards Program**

**Introduction:** This leadership guide contains information and tools for members and chapter leaders to get recognition for excellence and to improve performance and service to your membership. Awards should be used not for the end result but as a guide to take your chapter to the next level. Winning chapters experience chapter growth, improved member satisfaction and great personal achievement.

**Purpose Statement:** The purpose of NAHU's Awards Committee is to encourage chapters and members to strive for outstanding achievement and to recognize exceptional chapters and individual members for excelling in education, advocacy and professionalism.

**Strategic Planning:** Chapter leaders can use the Landmark, Pacesetter, and Legislative awards criteria to help identify and set the chapter's strategic goals and objectives. Incorporating award criteria into the short and long-term goals and objectives will provide leadership. Proven action plans will strengthen the organization. Strategic planning worksheets are available in the online Awards Toolbox.

### **State and Local Awards Chair Responsibilities & Job Description:**

(See appendix of this guide for the Leadership Commitment form)

- Assist Awards Chairs and Chapter Officers with awards
- Coordinate collection and documentation of all chapter activities
- Organize and lead Awards Committee
- Encourage chapters and deserving members to apply for awards
- Provide feedback on awards issues
- Participate in monthly conference calls (if applicable)
- Familiarize yourself with all awards
- Familiarize yourself with the Awards Leadership Guide
- Help educate new awards chairs (applies to state Award Chairs)
- Attend annual convention and regional meeting (HIGHLY Recommended)

#### What I Touch:

- All current awards applications
- Awards guidebook
- NAHU website
- Awards submissions sent in for the year

#### Who I work with:

- Chapter officers and committee chairs
- State or regional awards chair
- NAHU awards staff person
- Individual members

*Position descriptions are available for Regional Awards Chairs as well as National Awards Chair & Vice Chair.*

**Promoting NAHU Award Programs:** An Awards Chair's first responsibility is to engage your chapter leadership and to participate and assist in the strategic planning process. Another part of the Awards Chair's job is to encourage your chapter leadership to recognize key member volunteers with a local awards program. A couple of examples of a local award might be top new member recruiter or volunteer of the year. NAHU depends on the Awards Chair to become informed, to educate their chapter leaders and individual members about various awards and the benefits of the program, and to identify qualified candidates.

## **SUGGESTED TIMELINE TO ORGANIZE & COMPILE YOUR AWARD SUBMISSION**

The deadline to submit most award nominations to NAHU is April 5. Be sure to select a method of shipping that guarantees delivery by the April 5 deadline. The Awards Committee will not consider applications received after the deadline date.

To do an effective job in organizing and preparing an award submission, you will need to plan ahead. Below is a suggested timeline that can be adapted to your specific needs.

### *Twelve Months prior to the deadline*

Engage your chapter's executive team in the awards process. Make sure that the membership chair is providing you information with regards to membership, and the legislative chair is keeping documentation on their committee's activity. It is your job to provide a process to collect, organize and submit the information.

### *Three to four months prior to the deadline*

**Review with your board** what items have been completed and make recommendations on areas that need more focus in the next few months. Remind members to forward any and all emails to you that may document events or meetings held that can be used for documentation.

### *Two months prior to the deadline*

Begin organizing the data you have accumulated to determine what documentation is missing and needs follow-up. Begin organizing your nomination materials by setting up a notebook with dividers, typing outline summaries and contacting members for missing information.

### *One month prior to the deadline*

Organize the award submission in final form, tabulate points earned and attach the supporting documentation behind each section. Contact outside sources for any information required to complete the award criteria form. Make sure you highlight the area in the documentation that specifically addresses the criteria in that section. Each page should be visible and should not be stacked behind the next. The easier you make it is to find the information, the easier it is for the awards committee to judge your submission.

### *One to two weeks prior to the deadline*

Have the chapter president review the award criteria form to ensure all information has been included and make any necessary changes. Remember to have the chapter president sign the award submissions.

### *Two to three days prior to deadline*

Prepare the award submission to be shipped to NAHU. **Keep a copy of everything for your records and use a method of shipping that guarantees delivery by the required date.** Ship the application(s) to NAHU Awards Committee, NAHU, 2000 North 14<sup>th</sup> St., Ste. 450, Arlington VA 22201.

## **HOW TO BEGIN?**

### **At the beginning of your year as Awards Chair:**

- Download and print all NAHU awards to familiarize yourself with the criteria of each award. You can find the award criteria on the NAHU website <http://www.nahu.org/members/awards.cfm>.
- Assemble your empty submission booklets now. Print table(s) of contents, tab dividers and section heading pages with the items needed for each section, and organize your booklets that you will submit later. Use these award submission books as your guide and holder for the items that you will be collecting during the year.
- Meet with your chapter president to coordinate awards in strategic planning and/or leadership sessions.
- Plan to attend all board meetings and events for your chapter all year.
- Collect multiple copies of all meeting agendas, minutes, notices, flyers, registration forms; state approved continuing education certificates, all copies of newsletters, copies of media releases, etc.
- Review the state/local awards chair position description.
- Contact your regional awards chair to get acquainted and ask any questions.
- Complete and sign the commitment form. (See appendix section of this Leadership Guide.)

As awards chair, it is important that you are organized, detailed, active and involved in your association activities during the year. This participation will guarantee that you are attuned to the chapter's accomplishments and will help you compile the required documentation of the year's activity, increasing your chance of being one of NAHU's **TOP ASSOCIATION CHAPTERS OF THE YEAR!**

## Section 2: Awards Toolbox

The following tools have been developed by NAHU's Awards Committee to assist chapters with the awards planning and application process. These tools can be found on the NAHU website at <http://www.nahu.org/members/award-tool-box.cfm>.

**Awards At a Glance Matrix:** This tool that a concise description of the NAHU awards available to chapters and individual members. Achievement awards involve points for meeting established criteria. Membership awards are “contest” oriented.

Award	Area of Achievement	Awarded To	Number Given	Documentation Time Period
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### **INDIVIDUAL AWARDS**

Harold R. Gordon Memorial Award	Health Insurance ‘Person of the Year’	Individual Member	1	N/A
“Spirit of Freedom” Award	Federal legislation	Individual Member	1	Over Time
William G. Wetzel Award	Public speaking	Individual Member	1	April 1–March 31
Legislative Achievement Award	State legislative activity	Individual Members	5	Single Year or Over Time
Presidential Citation Award	Excellence in chapter leadership	Chapter Presidents	No limit	April 1–March 31
Distinguished Service Award	Association volunteer service	Individual Members	12	Over Time
Leading Producers Round Table	Personal Production	Individual Members	No limit	Calendar Year
Membership - Recruiter of the Year	Recruiting Most New Members	Individual Member	1	May 1 – April 30

### **LOCAL CHAPTER AWARDS**

Pacesetter Award	Service to members & the industry	Local Chapters	14	April 1–March 31
Legislative Excellence Award	Legislative involvement	Local Chapters	2	Calendar Year
Media Relations Award	Outstanding media relations	Local Chapters	2	April 1–March 31
Website Award	Effective, easily navigated website	Local Chapters	2	N/A
William F. Flood Award	Public Service activities	State or Local Chapter	1	April 1–March 31
Robert W. Osler Award	Education activities	Local Chapter	1	April 1–March 31
Membership – Most New Members		Local Chapters	2	May 1 – April 30
Membership – Highest Growth Rate		Local Chapters	2	May 1 – April 30
Membership – Highest Retention		Local Chapters	2	May 1 – April 30

### **STATE CHAPTER AWARDS**

Landmark Award	Service to members & the industry	State Chapters	9	April 1–March 31
Legislative Excellence	Legislative involvement	State Chapters	2	Calendar Year
Media Relations Award	Outstanding media relations	State Chapters	2	April 1–March 31
Presidential Citation	Membership and public outreach	State Chapters	No limit	April 1–March 31
Website Award	Effective, easily navigated website	State Chapters	2	N/A
William F. Flood Award	Public Service	State or Local Chapter	1	April 1–March 31
Robert W. Osler Award	Education activities	State Chapter	1	April 1–March 31
Membership – Most New Members		State Chapters	2	May 1 – April 30
Membership – Highest Growth Rate		State Chapters	2	May 1 – April 30
Membership – Highest Retention		State Chapters	2	May 1 – April 30

### **REGIONAL AWARDS**

NAHU Cup		RVP	1	May 1 – April 30
Membership – Most New Members		RVP	1	May 1 – April 30
Membership – Highest Growth Rate		RVP	1	May 1 – April 30
Membership – Highest Retention		RVP	1	May 1 – April 30

Individual & Chapter Awards Application deadline: Receipt in NAHU Office by April 5  
 LPRT Application deadline: Postmarked on or before March 31  
 Membership Awards and Contest ending date: April 30

## **COMMONLY ASKED QUESTIONS & ANSWERS?**

### ***How are the awards judged? How does the process work?***

Generally speaking, awards judging weekend takes place near the third weekend in April. The awards committee consists of your regional awards representatives, the NAHU awards chair and vice chair. In addition, the NAHU Secretary serves as the Board of Trustees liaison and the NAHU Vice President of Chapter Relations as staff liaison to round out the judging team. You may have heard that Awards Judging weekend is intense and it is intense fun!! It is a very long three and half days.

The committee is divided into teams of two. Each award submission is reviewed by at least two teams. Each team completes the entire review process separate from each other. No one is allowed to judge a submission from their home state, nor are they allowed to provide clarification or comment if questions arise. If a team has a question on documentation and how it applies to a criterion it is brought to the entire group for discussion and resolution. (Except a judge from the state submission in question; in which case they are excluded from the discussion or from making comment). If more than one viewpoint is expressed, a vote is taken. Each team signs off on the application and completes a feedback sheet.

The Awards Committee tried to give as many points as possible. We will give more points in areas that we can, even if they are not claimed on the application. For example, if you took 10 points for a regular meeting but would have gotten 50 points for a leg meeting (assuming it qualified), then the leg meeting points are given instead.

### ***What are the most common reasons points are disallowed on an awards application?***

- **Lack of Documentation** Often, points are taken where documentation is required, but appropriate documents are not included. The Awards Leadership Guide will answer most of your questions in this area, since it has been updated to include commentary on every criterion. Please note that board minutes can be used many times throughout your submission as documentation.
- **Documented events, programs, and/or items do not meet the criteria** Sometimes documentation was received but did not meet the criteria. For example, sending 4 copies of newsletters but taking points for monthly newsletters. We would give credit for a quarterly newsletter in this example.
- **Press Hits** The AHU chapter or NAHU must be mentioned in published articles to count.
- **Double dipping - counting 1 meeting more than 1 section** An example would be a legislative meeting and then taking points again for the same meeting under regular membership meeting. We would allow the highest points, not both.
- **Confusing Leadership Training with Strategic Planning** Leadership training is when you train your new board members on what their duties will be; explain what NAHU stands for, etc. Strategic Planning is when the chapter sets its sets long and short-term goals, budget amounts, etc.
- **Not knowing the difference between the media pieces** There is still a lot of confusion in this area. Please check the media section of the NAHU website for clarification of what is what. The new Awards Leadership Guide has been expanded in this area and will give you guidance.

- **Documentation is outside of the required timeframe or not dated at all** Some criteria must be met the time period 1/1 through 12/31 regardless the awards year is 4/1 through 3/31. The documentation must clearly state that criterion was met within the required timeframe.
- **Information submitted does not match NAHU's official records** The NAHU website has criteria lists that will help in this area. For example, you can print off HUPAC information, delegates to the convention, etc. You can also view who is listed as Chairs in your chapter to make sure the right people attend the right meetings to get the points. The various lists are shown in the Rules and Submission Guidelines section of this Leadership Guide.
- **Chapter sponsoring the event and submitting chapter are not the same** A local chapter cannot take credit for a state chapter's event. If you are taking points for your chapter for any sponsored or co-sponsored event, the documentation provided (e.g. copy of announcement, program and/or agenda) must mention your chapter name as a sponsor.
- **Website Award** Links do not work or information is not on Title/Home page as required.
- **Taking credit for more events then providing documentation for** Documentation is provided for eight membership meetings but points were taken for 12 meeting. Points will be reduced based on the number of documented meetings. To meet the monthly meetings criteria 12 meetings must be documented.

***If we could do one thing to improve our chances of not losing points, what would it be?***

Once you're done assembling your binder, have someone else (a spouse or a friend) go over it with the application in hand and see if they can find everything and it's clear. Remember that when the committee is judging your submission, they don't have any idea who John Smith is, or what your chapter has accomplished. Be sure verification letters, etc. mention your chapter specifically. If an outsider can understand it, we will be able to as well.

***Many of the awards have 50 bonus points for organization. What would cause us not to get all of those points?***

Most submissions are well organized and receive maximum points. It is unusual for a submission not to receive any bonus points. The most common reasons for disallowing all or part of them is when we have to search for information in other sections, or if the binder is falling apart/in bad shape. Using good quality binders that are big enough is essential.

***What kinds of points are based on NAHU's records? Do I need to document these items?***

Growth in membership, HUPAC contributors, LPRT members, officer information and these kinds of items are verified prior to the weekend by NAHU. Once verified, we don't review them again. By providing NAHU documentation, your submission is complete your submission, but it has no effect on the score. Remember too, if a specific person must fulfill a requirement (for instance, Leg Chair attending Cap Conference), the person officially reflected in NAHU records as holding that position must attend. Anyone else will not count.

***If points are given for a specific person attending an event, for example the President-Elect attending the Leadership Training prior to Capitol Conference, can an alternate be sent if that person can't make it?***

No, substitutions are not permitted, there is a reason a specific officer is named and that person must be the one to fill the criteria.

## **Monthly Reminders:**

If you are functioning as your state or local awards chairperson, you may find the following tasks helpful in communicating with your chapter leaders or other awards chairs.

- July/August*
  - Introduce yourself as their contact person and offer to help with any questions
  - Send out a list of Awards Winners from National Convention
  - Congratulate the winners in your chapter, state and/or region
  - Encourage the use of Landmark/Pacesetter/Legislative awards in Strategic Planning and assignment of specific tasks by Committee Chair and/or Board Member
- August*
  - Offer to assist Chapter Presidents/Awards Chairs with Strategic Planning sessions
  - Encourage everyone to attend Regional Meetings so they have the latest and greatest awards information available. Take your awards submission with you.
- September*
  - Outline/review changes in program for those who could not attend Regional Meeting
- October*
  - Send out Awards At A Glance Matrix
  - Encourage use of files or folders to keep the documentation sorted and organized
  - Ask how the collecting and sorting of the awards information is going
- November*
  - Recommend an individual for the State Legislative Achievement Award and encourage the submission
- December*
  - The Holidays are the perfect time to make a Public Service donation for awards points
- January*
  - Review collected documentation for areas of weakness; determine what's missing
  - Organize documentation in a 3 ring binder with tabs separating each section
  - Are there members in your chapter that need encouragement to apply for an award?
- February*
  - Give status report to chapter board -- identify areas of weakness and solicit assistance
  - Encourage assistance in filling the blanks in planned submissions over next 2 months
- March*
  - Remind contributors of documentation that the receipt deadline is April 5th
  - Offer your assistance to answer questions or help in any way you can
- April*
  - Submissions are due at NAHU on April 5!!
- May*
  - Encourage Awards Chairs and individual members to attend National Convention so they can receive awards in person
  - Plan to attend Awards breakout session to learn about changes, leadership guide revisions & tools
- Other*
  - Bulletin to all members in your region about individual awards
  - Promote and attend Webinars when dates are announced

### **Power Point Presentations and Webcasts:**

Additional resources include power point presentation(s) and webcasts. These can be accessed in the awards toolbox section on the NAHU website. If you would like to customize the power point materials for your use please contact your regional awards chair or NAHU's chapter relations staff.

### **Strategic Planning Spreadsheets:**

Strategic planning spreadsheets are available for the *Landmark, Pacesetter, and Legislative* chapter awards. On an individual award basis, the *Presidential Citation* award strategic planning spreadsheet is also available. The tool lays out all of the judging criteria and who in the committee's best judgment maybe your best resource for information and documentation. For example in the Landmark Award chapter there are a number of chapter management criteria, the spreadsheet suggests that the chapter president is the likely person to help with this criterion. <http://www.nahu.org/members/award-toolbox.cfm>

## **Section 3. Award Overview**

### **CHAPTER AWARDS**

#### **Landmark Award**

Honors state chapters for outstanding achievements and excellence in serving their members, the industry, and the public. The recommended point threshold is 2,480 points. A total of nine Landmark Awards may be presented - one award for chapters with a membership of 149 or less; three awards for chapters with a membership of 150 to 399; three awards for chapters with a membership of 400 to 749; and two awards to chapters with a membership of 750 and greater. Membership classification is based on the April Membership Count Report.

#### **Pacesetter Award**

This award honors local association chapters for outstanding achievements and excellence in serving their members, the industry, and the public. The recommended point threshold is 2,135 points. A total of fourteen Pacesetter Awards may be presented to the highest scoring chapters as follows: four local chapters with a membership of 1 to 75; four local chapters with a membership of 76 to 149; three local chapters with a membership of 150 to 249; and three local chapters with a membership of 250+. Membership classification is based on the April Membership Count Report.

#### **Legislative Excellence Award**

The Chapter Legislative Excellence Award honors state and local chapters that excel in their legislative involvement by performing outstanding service throughout the year. State chapters receive the award based on state chapter activity only. Local chapter points are awarded for chapter activities only. A total of four Chapter Legislative Excellence Awards may be given each year: One award to the chapter scoring the highest points in each of the following categories: state chapters with over 300 members; state chapters with 300 or less members; local chapters with over 126 members; local chapters with 126 or less members. Membership classification is based on the April Membership Count Report.

#### **Media Relations Award**

The Media Relations Award honors state and local associations for outstanding media outreach efforts, achieving broadcast and press coverage and maintaining relationships with various media contacts. The recommended point thresholds are 150 for local chapters and 300 for state chapters.

A total of four Media Relations Awards may be presented to the highest scoring chapters in the following size categories: one award to a state chapter with over 250 members; one award to a state chapter with 250 or less members; one award to a local chapter with over 150 members and one award to a local chapter with 150 or less members. Membership classification is based on the April Membership Count Report.

#### **Robert W. Osler Education Award**

The Osler award honors state and local chapters that demonstrate exceptional leadership by providing outstanding educational programs on health insurance and related topics to members, associates and the general public. Two awards are presented – one to a state chapter and one to a local association chapter. The recommended point threshold is 740 points.

#### **State Website Award**

The State Website awards are presented to state chapters for outstanding web sites that serve as a resource for members, non-members and the public, and promote the value of membership. A total of two awards may be given: The recommended threshold is 550 points. Winning chapters are provided a “NAHU Website Award Winner” seal to post on their website.

### Local Website Award

The Local Website awards are presented to local chapters for outstanding web sites that serve as a resource for members, non-members and the public, and promote the value of membership. A total of two awards may be given: The recommended threshold is 425 points. Winning chapters are provided a “NAHU Website Award Winner” seal to post on their website.

### William F. Flood Public Service Award

This award is presented to one state or local chapter that excels in their involvement in public service activities. The recommended point threshold is 800 points.

## **INDIVIDUAL AWARDS**

### Harold R. Gordon Memorial Award

NAHU’s highest honor, the Gordon Award recognizes the health insurance industry’s “Person of the Year”. Nominations are submitted to the National Board of Trustees. A separate committee conducts the review and presentation of this award. Therefore, no application and criteria are found in this Leadership Guide. If you have questions about the Gordon Memorial Award and the nomination process, please contact NAHU’s Vice President of Chapter Relations.

### Distinguished Service Award

Presented to members who have contributed significantly above and beyond what is normally called for in connection with association volunteer service at the local, state and/or national level over an extended period of time. The individual’s commitment of time, talent and finances to the advancement of the association and the health insurance industry should be exemplary. A maximum of twelve awards may be given each year. The recommended point threshold is 70 points. An individual may only receive this award once every five years. Eligibility is verified by NAHU.

### State Legislative Achievement Award

This award recognizes members who have performed special service in state legislative affairs during a single association year or over an extended period of time. This honor is presented to members making significant contributions and performing outstanding service in connection with state legislative matters by developing and implementing methods to strengthen and improve NAHU’s stance in the industry. Nominees should reflect the NAHU vision and values as continually demonstrated in their outstanding legislative contributions to their respective states. A maximum of five State Legislative Achievement Awards will be given each year.

### Presidential Citation Award

Presented to state and local association Presidents who lead their chapter to achieve a high level of excellence. This award emphasizes chapter leadership, strengthened membership and the conduct of public outreach programs. Applicants must satisfy at least ten of 20 criteria.

### Spirit of Freedom Legislative Award

Recognizes members who have performed outstanding service over an extended period of time and made significant contributions of time and effort in State and Federal Legislative work. The recipient is honored for displaying an aggressive leadership role by building relationships with legislators that directly impact public policy; by actively taking NAHU’s message to key media outlets; and by developing strong grassroots initiatives. The award will be presented only when a nominee of sufficient merit is found, but in no instance will more than one award be given in a year. A member can only receive this award once in a lifetime.

*William G. Wetzel Excellence in Public Speaking Award*

This award honors members who have demonstrated excellence in public speaking by giving presentations that educate and/or deliver important information to AHU members, industry colleagues, public officials and/or the public. The recommended point threshold is 50 points.

## **Section 4. The Application Process**

### **RULES AND SUBMISSION GUIDELINES**

1. Each award submission must be sent in a separate binder, notebook or folder. If you are applying for more than one award, please make sure each award submission is in a separate binder to facilitate the judging process. Awards in binders containing multiple awards will be disqualified.
2. Do not send videotapes, cassettes, floppies or CDs for the committee to review. The Awards Committee will review paper documentation only.
3. No supporting documentation is required with Local and State Website award applications.
4. Where required, copies of letters, faxes, e-mails, citations, newspaper articles, and board reports/minutes may serve as documentation. When submitting e-mails, clarify who the author is and their title or position if not apparent in the e-mail.
5. Your submission must include the NAHU original application form/score sheet with completed point scoring, where applicable. Rekeyed or retyped applications will be disqualified. Packets received without application forms/score sheets will not be considered.
6. The decision of the Awards Committee is final.
7. (\*) indicates documentation must be submitted for this criteria. No points are awarded without documentation, except as noted. Where noted, satisfaction of criteria will be verified by NAHU.
8. Please arrange documentation by Criteria Number. Each page should be labeled with the criteria number it applies to.
9. Documentation should be specific to the criteria.
10. If pictures are included in your submission, include an explanation and individual names and title of those in the picture in a caption below the picture.
11. Make sure to include adequate explanations, where appropriate. Keep in mind the Awards Committee does not know the individual members or important regulatory and legislative persons in your state or local area.
12. If you would like your award submission returned following the annual convention, please enclose a check in the amount of \$10, payable to NAHU, in your packet. If your chapter has submitted more than one award application, the \$10 fee applies to the return of up to three applications to a single address. There is a \$2 fee per additional application. (i.e. 5 applications to the same address will cost \$14.) Unclaimed submissions become the property of NAHU and will be destroyed.
13. Bonus points are awarded by the NAHU Awards Committee upon review of the award application, based on organization of documentation, composition, design and appearance of the submission. The Awards Committee is looking for 1) an organized format, which includes material set up in a binder, divided into sections with tabs, documentation that is clearly labeled and highlighted where appropriate; and 2) complete and concise documentation that follows a Table of Contents., etc.

Bonus points can make a difference in who the winner is. This should provide an incentive to you to do an effective job to increase your chapter's chance of winning. If Board minutes or other lengthy criteria are being submitted as documentation, please highlight the information that is to be reviewed. An excellent submission would be highly organized, neat in appearance, creatively designed, with complete documentation, including pictures and highlights of the year. A good submission will be very organized, neat and easy to follow. A fair submission would include all the information, but not documented or organized in a manner that would be easy to follow.

14. Make sure your award application and documentation is in a binder that is big enough and strong enough to hold the contents and survive its trip through the postal service. Easily turned pages help earn bonus points. A binder that falls apart or is difficult to work with (i.e. pages catch when trying to turn) can take your submission from excellent to poor in a heartbeat!
15. Please make a copy of everything you submit for your own records.
16. No points are awarded in a category that does not have adequate supporting documentation.
17. Award nominations may be submitted by an individual member or chapter. Candidates for legislative awards may be nominated by an individual member, chapter or the Legislative Council.
18. When no applications are received for a particular award, or award category, the award will not be given in that year.
19. When there is not an award submission deserving of any particular award, the Awards Committee may determine that particular award will not be given in that year.
20. The deadline for receipt of the application and all supporting documentation, regardless of delivery method, at NAHU is April 5. Be sure to select a method of shipping that guarantees delivery by the April 5 deadline. The Awards Committee will not consider applications received after the deadline date.
21. NAHU provided "criteria lists" are posted on the NAHU website to be used as documentation for award applications. The majority of these lists are available mid-February and include:
  - Credentialed delegates at National Convention
  - National Convention Attendees
  - Capitol Conference Attendees
  - Regional Meeting Attendees
  - Leadership Program Attendees
  - HUPAC Contributors
  - Professional Designation Lists
  - LPRT Qualifiers
  - Triple Crown Award Recipients
  - NAHU Topic Specific Webcast Attendees: Legislative, Media

Questions on these lists may be directed to NAHU's Vice President of Chapter Relations.

## **GATHERING AND ORGANIZING INFORMATION**

This section will help you to gather and organize information in a logical manner so that the Awards Committee can easily determine if you have accomplished what is listed in your application.

1. Download and print two copies of the nomination form and score-sheet. Use one copy to keep a record of the items you have collected. Use the 2<sup>nd</sup> copy for your completed score-sheet that you will include with your submission.
2. Prepare a title page.
3. Place the nomination form and completed score-sheet listing all points you determine the chapter has earned in the front. DO NOT retype the scoring sheet, it must be the original sheet downloaded from the website. **If the scoring sheet is retyped the application will be disqualified.** Review your documentation to determine what your chapter has accomplished. Review the board meeting reports and consult with committee chairpersons. Some items can be verified by NAHU, but you must still include the documentation.
4. Set up a table of contents to organize your documentation using the same headings listed on the main sections of the award criteria form. For example: I. NAHU Events, II. Meetings/Events, III. Communications, etc.
5. Set up the main sections in your notebook as listed in the table of contents. You can use a colored sheet of paper to separate each section; this helps to visually delineate the items.
6. At the beginning of each section, prepare a summary of all the items listed under the main section. This is most effective if set up in a “bullet-point” format.
7. Finally, attach back-up documentation behind the summary page in each tabbed section showing what your chapter has accomplished. Mark each page of documentation with a note in the margin what the documentation references (e.g., Section IV, Number 2). Highlight the information if it is imbedded in a page with other items. Do not place one item in a section and refer to the documentation in another section, it is preferable to make copies of the page and place in the appropriate sections.
8. Each page of documentation should be numbered to correspond with the section it refers to. Example: Section I, Number 5. Submission should be organized so that documentation for each point should be provided in the appropriate section. If the documentation is not located in the appropriate section and is too difficult to find, the points may not be given. For items that there is maximum points set, the points are listed.

***THE KEY POINT TO REMEMBER IS TO MAKE YOUR SUBMISSION EASY FOR THE AWARDS COMMITTEE TO REVIEW AND DETERMINE THAT YOU HAVE PROVIDED BACK-UP DOCUMENTATION FOR ALL POINTS TAKEN.***

## **Section 5. Chapter Award Criteria and Documentation**

*(Landmark, Pacesetter, Legislative Excellence, Media Relations Award, Website Award, William F. Flood Award, Robert W. Osler Award)*

### **LANDMARK AWARD**

#### **Criteria & Documentation Suggestions**

##### **I. NAHU EVENTS (these items are verified by NAHU):**

- #1 Credentialed delegates at National Convention: List is posted on NAHU website in Awards section under “criteria lists”. Print the appropriate list, highlight your chapter members and submit this list as documentation.
- #2 Additional registered attendee(s) at National Convention: List is posted on NAHU website in the Awards section under “criteria lists”. Print the appropriate list, highlight your chapter members and submit this list as documentation.
- #3 Legislative Chair attending Capitol Conference: To see who is listed as your chapter legislative chair, go to NAHU website ([www.nahu.org](http://www.nahu.org)) and click on “Chapter Info and Resources”, select Chapter/Officers/Dues Search and select your chapter’s state from the drop-down menu. Click on the link for your chapter. The next page will list the current board information on file with NAHU. Co-chairs are eligible for points so long as the information has been registered with NAHU no later than March 31 of the current awards year.
- #4 Additional registered attendee(s) at Capitol Conference: List of Capitol Conference attendees is posted on the NAHU website in the Award section under “criteria lists”. Print the appropriate list, highlight your chapter members and submit this list as documentation.
- #5 Registered attendees at Regional Meeting: Regional meetings must be conducted by the Regional Vice President (RVP) with all states in the region invited. The list of attendees must be produced by your RVP and will be posted on the NAHU website, in the Awards section under ‘criteria lists’.
- #6 Membership and Retention Chair at Regional meeting: Verified by NAHU.
- #7 Membership and Retention Chairs at Annual Convention: Verified by NAHU.
- #8 President-elect attended NAHU Leadership Program at Capitol Conference: NAHU Leadership Program is held in conjunction with Capitol Conference. Attendance verified by NAHU.

##### **II. CHAPTER MANAGEMENT:**

- #1 Development/publication of state bylaws\*: Provide copy of document and show where this information is available to the member. May be published on chapter website, special mailing or in newsletter.
- #2 Development/publication of state policies & procedures\*: Provide copy of document and show where this information is available to the member. May be published on chapter website, special mailing or in newsletter.
- #3 Development/publication of Strategic Plan to members\*: Provide copy of document and show where this information is available to the member. May be published on chapter website, special mailing or in newsletter. Provide copy of communication showing that strategic plan was distributed to the membership.
- #4 Published an Annual Summary Report of Chapter Activities and Accomplishments to members, demonstrating value of members: Chapters should reference the NAHU report distributed to members at annual convention as an example. Provide copy of report, including date and method of delivery to members. May be published on chapter website, in a newsletter or separate mailing.
- #5 IRS approved Tax-exempt status\*: Provide a copy of the IRS letter of qualification.

- #6 Annual publication of approved state budget\*:** Provide copy of document and show where this information is available to the member. May be published on chapter website, special mailing or in newsletter.
- #7 Annual publication of approved state profit/loss financial statement\*:** Provide copy of document and show where this information is available to the member. May be published on chapter website, special mailing or in newsletter.
- (Note on Items #1, #2, #3, #6 and #7 Print pages off website or include a copy of the newsletter where published, or provide copy of dated communication. Clarify what publication source is used.)*
- #8 Incorporation Papers\*:** A copy of the incorporation papers or proof of incorporation from your state must be supplied as documentation.
- #9 D&O liability insurance in force for state officers\*:** A copy of the Directors & Officers (D&O) policy or dated premium billing with a current effective date is proper documentation. Be sure the dates of the policy period are on the documentation or include a page from the policy showing the coverage period and that those dates are during the awards period. If state laws exempt non-paid officers of tax-exempt organizations from liability, must show documentation of such law to eliminate need for coverage.
- #10 Purchase of liability insurance for state events\*:** Provide documentation that policy includes coverage for events. Documentation may include copy of policy with current date and appropriate sections highlighted, dated premium billing showing coverage period and specific event coverage rider, etc.
- #11 100% Board Recruitment Award:** Verified by NAHU.
- #12 Perpetual State Chapter Award program, honoring members and/or chapters achievement and outstanding service\*:** Provide description of awards program and list of recipients. Program must be conducted each year.
- #13 Silver Seal Certification:** Submit copy of notification. Verified by NAHU
- #14 Develop/conduct New Agent Outreach Program involving local chapters – to mentor and recruit new agents into industry:** Submit documents outlining program, record of development in board meeting minutes, committee reports, etc., when and how conducted and communications involving local chapters.

**III.STATE MEETINGS/EVENTS** -- For state conventions, leadership conferences and strategic planning sessions, submit agendas, announcements, registration forms and/or board minutes with dates to document when these meetings and/or events occurred during the award period. Each meeting/event must be completely separate from the other and can only be counted once. Documentation should show that the event occurred and not just discussion in the minutes that suggest an event should happen.

- #1 Held a State Convention/Sales Congress\*:** NOT a legislative conference or regular membership meeting. Must be special event offering multiple CE credit hours.
- #2 Held an annual State Leadership Conference\*:** Not a strategic planning session, board meeting, legislative conference or regular membership meeting. Must be sponsored and held by your chapter. Submit copy of agenda and/or meeting minutes. Agenda must be of leadership training content.
- #3 State Strategic Planning Sessions\*:** Must be separate from regularly scheduled board meetings and open to members. Submit dated announcement or website posting notifying members. Submit minutes and/or meeting agenda. Agenda must be of strategic planning content – i.e. review accomplishments, setting goals and objectives, event planning, etc. Points are not given for leadership training, as it is a separate and distinct topic.
- #4 Holding regularly scheduled Board meetings\*:** Not a strategic planning sessions. Teleconferences are acceptable. Board meetings must be announced in advance and open to the membership.

#### **IV. COMMUNICATIONS**

- #1 State Newsletter Publication\*:** Submit original cover and table of contents for each edition, no copies as documentation. If newsletter distributed by email or published on website, a printed copy of the newsletter must be provided for documentation. The submission should include a copy of either the web page showing the link to the newsletter AND the pages printed off the site, or a copy of the email distribution letter, showing to whom the newsletter is sent and the newsletter itself.
- #2 Maintain State Website\*:** Enter website address on application. Provide copy of website home page. Include any required password. Validity of the website will be verified by NAHU.
- #3 Current E-mail of FAX distribution to chapter membership\*:** Attach a portion of the fax and/or e-mail distribution list for documentation. Lists can be requested from chapter's fax service or email service.
- #4 Conducted a Member Needs Survey\*:** This survey must be separate from evaluation sheets distributed at events. Include copy of survey and/or evaluation sheets, and provide summary of response. Documents must be dated. Documentation may also include board minutes, special committee report, etc.

#### **V. LEGISLATIVE ACTIVITY**

- #1 Regular legislative communications piece sent to all chapter members\*:** Documentation suggestions include regular legislative newsletter, email, fax, column in a chapter publication or updated page on a chapter website that is updated and made available to all chapter members at least monthly. Content should include information on state and/or federal legislative & regulatory activity & events.
- #2 Managing an active Legislative Committee\*:** This may be documented through committee minutes, reports and other communication pieces sent out by the legislative committee. A committee must include more than just one person. An "active" committee reviews and monitors federal and state legislative issues and regulations, has established communication methods in place, and solicits grassroots involvement and a specific course of action on key legislative issues. Items generated by NAHU and forwarded by your chapter will not be counted.
- #3 Full or Part-time AHU State Lobbyist Program\*:** Documentation of a lobbyist program may be shown through board minutes, lobbyist reports, contracts and news articles.
- #4 Membership participation in State PAC\* (for period January 1 – December 31):** A copy of the current membership and financial statements showing each members contribution amount should be used as documentation. Will be verified by NAHU
- #5 Membership support to HUPAC\* (for period January 1 – December 31):** Contact NAHU's manager of legislative communications or your Regional HUPAC Chair to obtain a list of your chapter members who supported HUPAC during the period. This list is also posted to the NAHU web site after the first of the year. Will be verified by NAHU
- #6 Meet with state DOI and/or other regulatory bodies\*:** Provide copies of legislative comment and/or board meeting minutes with reports on these meetings. Regulatory bodies are state departments that have an influence on the insurance business. They are not federal congressmen or senators.
- #7 Hold a state legislative conference of "Day with Legislators"\*:** Documentation should be in the form of agendas, announcements, registration forms and/or board minutes with dates to document when these meetings and/or events occurred during the award period.
- #8 State-based Operation Shout\* (for period January 1 – December 31):** Operation Shouts must be for STATE based campaigns not NATIONAL based campaigns. Documentation suggestions include operation shout participation reports generated by the NAHU legislative department and/or printouts of the state's operation shout web postings.
- #9 Hold/attend meetings with industry colleagues or coalition partners\*:** Document through legislative committee/board meeting minutes with reports of the meetings actually taking place.

## **VI. MEMBERSHIP**

- #1 Chartering one or more local chapters (for period 04/01 through 03/31)\*: You may contact NAHU's Vice President of Chapter Relations or find the information posted on NAHU's website. The information submitted is subject to verification by the NAHU Awards Committee.
- #2 Net State membership gain (for period 04/01 through 03/31): Verified by NAHU.
- #3 Having an active membership campaign\*: To demonstrate that your chapter conducted a formal membership campaign, submit the promotional materials and reports on the outcome. Must conduct formal membership campaign to encourage member recruitment. Documentation MUST show the length of time of the campaign.
- #4 Membership chair on monthly regional membership teleconferences: Verified by NAHU.
- #5 Retention chair on monthly regional membership teleconferences: Verified by NAHU.
- #6 Contact with local chapters about follow-up retention activities each month and reporting to Board of Directors\*: Provide copies of retention chair reports and board minutes, e-mails/correspondence showing contact and/or response from local chapters, efforts to assist local chapters in retention activities, etc.

## **VII. EDUCATION/AWARDS:**

- #1 Host state education/professional development program for members\*: This may be documented with copies board reports, minutes, agendas, sign-in sheets, program and flyers, etc.
- #2 Actively promote LPRT to members\*: Show multiple communications to members regarding the value of the LPRT program and the encouragement to participate. Promotion may have occurred in the chapter newsletter, presentation at meetings and events, testimonial letters from board members to the membership, etc.
- #3 Compile list of speakers and publish to membership\*: List might include Name, topic, short bio and contact information. Show how this information is made available to membership.
- #4 Present "Education Resources" PowerPoint at a leadership training or strategic planning meeting\*: Submit meeting notice or announcement including date, time and place, and proof that session occurred (list of attendees, program report and/or board minutes).
- #5 Conduct an overview of NAHU website at chapter meeting\*: Submit meeting notice or announcement including date, time and place, agenda or program, and list of attendees. Other documentation could include board meeting minutes, e-mail notices, website posting, newspaper article, committee report, etc.
- #6 Number showing of NAHU Single Payer program by chapter or members\*: Submit meeting notice, announcement, program, invitation and confirming acknowledgement or thank you letter, etc. including date, time and place of each showing.
- #7 Members receiving the RHU, REBC, DIA, LTCP, CSA OR CLTC designation(s) (for period 04/01 through 03/31)\*: To document the chapter recipients of these designations, print the list posted on the NAHU website in the Awards section under "Criteria Lists" and highlight your chapter's recipients.
- #8 LPRT Qualifiers\*: For points to be awarded for each LPRT qualifier, provide a copy of the list of names that is available on NAHU's website in the Awards Section under "Criteria Lists."
- #9 Triple Crown Award Winners\*: Print copy of the list of verified Triple Crown winners posted on NAHU's website in the Awards Section under "Criteria Lists".
- #10 Formal presentation of awards and recognition of member achievements\*: Includes local, state and national award recipients, new professional designations, membership recruiting, HUPAC and state PAC donors, and LPRT qualifiers. Possible documentation: board minutes, newsletter articles, announcements, flyers, program from event, etc.

### **VIII. MEDIA RELATIONS:**

- #1 Appoint a Media Relations chair:** NAHU will verify that a Media Relations Chair was appointed.
- #2 Compile list of local media contacts\*:** Include a list with ALL of the following information: contact name, publication or broadcast station, phone and fax or email address. Incomplete listing will not receive credit.
- #3 Conduct Media Outreach\*:** Points for letters, articles and press releases are given for piece(s) written by a member to/for the state chapter. Include copies of all letters, articles and press releases. Duplicate mailings or submissions do not count for points. Pieces must be written by a member of the state chapter. Contact your Regional Media Relations Chair for clarification of each item. Meeting announcements do not count as press releases.
- #4 Press hits\*:** Provide copies of articles/letters, meeting notice or announcement published or proof of appearance on radio/TV. Copy needs to include date and place published or time, date and place aired AND MUST MENTION the State Chapter and/or NAHU.
- #5 Present NAHU's "Working with the Media" PowerPoint at a state chapter-leadership training session\*:** Submit meeting notice or announcement including time date and place, and sign-in sheet or list of attendees.
- #6 Assisted local chapters with promotion of "Health Insurance Awareness Week"\*:** Provide board minutes and /or reports showing how the state association supported the local chapter. Documentation must include the time, date and place of the Health Insurance Awareness Week. For tools to assist with the Health Insurance Awareness Week event check the Media & Communications section of NAHU website <http://www.nahu.org/media/tools.cfm>.

## PACESETTER AWARD

### Criteria & Documentation Suggestions

#### I. NAHU EVENTS:

- #1 Credentialed delegates representing the chapter at NAHU Convention\*: Verified by NAHU
- #2 Additional registered attendees at NAHU Convention\*: Verified by NAHU
- #3 Legislative Chair attending Capitol Conference\*: Verified by NAHU
- #4 Additional registered attendees at Capitol Conference\*: Verified by NAHU
- #5 Registered attendees at regional meeting: Regional Meeting must be conducted by RVP with all states in region invited. Document with an article in the newsletter or the chapter board minutes listing attendees. Also, attendees list may be available on NAHU's website. Verified by NAHU.
- #6 President-elect attended NAHU Leadership Program at Capitol Conference: NAHU Leadership Program is held in conjunction with Capitol Conference Information is verified by NAHU.

*(Note: Information lists are posted on NAHU's web site in the Awards Section. Print the appropriate list, highlight your chapter's participating members and submit this list as documentation. To see who is listed as your chapter's legislative chair go to NAHU's website (www.nahu.org) and click on "Chapter Info and Resources", select Chapter/Officers/Dues Search" and select your chapter's state from the drop-down menu. Click on the link for your chapter. The next page will list the current board information on file with NAHU. Co-chairs are eligible for points so long as the information has been registered with NAHU no later than March 31<sup>st</sup> of the current awards year.)*

#### II. CHAPTER MANAGEMENT:

- #1 Local Chapter Board members attended a State AHU sponsored strategic planning session\*: Documentation of local chapter board members attending their State AHU strategic planning meetings would be a copy of the minutes of the meeting by the State AHU secretary listing the names of the meeting attendees and the chapters they represent. Documented state program must be Strategic Planning and NOT Leadership Planning.
- #2 Holding a Local Chapter New Officer/ Leadership Training Workshop\*: Documentation could include meeting minutes, newsletter articles, workshop agendas and sample of materials used. This is not a strategic planning meeting. Meeting should include an outline of duties for each position. Local chapters are responsible for leadership training, not strategic planning. Regular board meetings are not considered training or workshops.
- #3 Active Committees: Circle the chapter's active committees on the application. Documentation could be individual committee reports or board meeting minutes.
- #4 Published an Annual Summary Report of Chapter Activities & accomplishments\*: Must be a separate report sent to all members via mail or email, an article in chapter newsletter or posted on the chapter website.
- #5 Have D&O liability insurance\*: Documentation would be a copy of the declaration page of the D & O policy, highlight dates of coverage, they must fall **within** the award timeframe (04/1-3/31). Include any pages that confirm who is covered and coverage levels.
- #6 100% Board Recruitment Award: Verified by NAHU.
- #7 Continual Chapter Award Program that honors member achievements and outstanding service\*: Document with meeting flyers, board meeting minutes, program books. A list of members and their achievements should also be included.
- #8 Silver Seal Certification\*: Verified by NAHU.
- #9 Membership support of HUPAC\* (for period 01/01-12/31): Verified by NAHU.

- #10 Membership support of state PAC\* (for period 01/01-12/31): Obtain a list of state PAC contributors and total contribution amounts from your State PAC committee. Print pages and highlight local chapter members.
- #11 Regularly scheduled Board meetings\*: Monthly board meetings points are based documentation for each meeting claimed. Documentation should include by copies of board minutes.
- #12 Held Strategic Planning meeting open to the membership\*: Documentation could include a separate notice via mail or email or article in the chapter newsletter inviting members to attend the chapter Strategic Planning meeting. Strategic Planning meeting minutes showing attendance by non-Board members should also be included. This meeting is not a Leadership Training meeting.

### **III. LOCAL MEETINGS/EVENTS:**

- #1 Hosted a local Sales Symposium or CE Seminar\*: Must be a special event that does not coincide with regular membership meetings. Possible forms of documentation are flyers or announcements of Sales Symposium/Sales Congress or CE Seminar program.
- #2 Regularly scheduled local membership meetings\*: Monthly meetings are documented provided newsletter article, flyers, board minutes or website posts. Special meetings do not qualify as one of the 12 meetings. Events and activities are only counted once.
- #3 Provided a separate meeting devoted to legislative issues, for members\*: A legislative content meeting is a special meeting or program presented to the membership. Points for this meeting can only be used once. A legislative mixer is not considered to be a legislative content meeting. Submit an announcement or article from your newsletter referencing this special meeting as documentation.
- #4 Held new member orientations, separate from membership meetings\*: Documentation includes a list of attendees and board meeting minutes, agenda, website notice, etc.
- #5 Hosted "Health Insurance Awareness Week" program\*: Documentation must include the time, date and place of the Health Industry Week. For tools assist the chapter with the Health Insurance Week event, check the Awards Section NAHU's website; <http://www.nahu.org/awards/Awards.htm>

### **IV. LOCAL COMMUNICATIONS:**

- #1 Distribution of local newsletter\*: Submit original cover and table of contents for each printed edition do not submit photocopies as documentation. The month and year must be printed on the newsletter. If the chapter distributes an electronic newsletter, a hardcopy including ALL pages must be submitted. Be sure the month and year of the publication along with page numbers are included on each page. Web-based newsletters must include the web address newsletter. Email-distributed newsletters need to include cover page for each of the emailed newsletters showing the date the newsletter was emailed to the membership, including the "TO:" field. If the distribution list does not show in the "TO" field, provide a partial distribution list from your provider for each issue.
- #2 Maintain a Chapter Website\*: Submit the chapter's website address.
- #3 Active email and/or Fax Distribution to membership\*: Document with a portion of the fax and/or email distribution list.
- #4 Annual publication of chapter's budget and financial statements\*: Document with a copy of the handout and the board meeting minutes when this has been completed. If the statements are published on the chapter website, the copy must include the web address of the page where the information is located. A notice printed in each issue of the chapter newsletter or website stating "Financial reports are available for review. Please contact the Association Treasurer" or similar statement can also be included with the documentation.
- #5 Participated in State coordinated New Agent Outreach Program to mentor and recruit new agents into industry\*: Submit flyer, invite, minutes that show the activity that occurred with this project.
- #6 Conducted a Member Needs Survey: Provide a copy of the survey, board minutes indicating the date and the method that the survey was distributed to the membership, along with the survey results.

## **V. MEMBERSHIP:**

- #1 Sponsored chapter membership campaign/contest\*: Show formal membership contest through announcements, promotional materials and board reports. Documentation should include the dates of an ongoing campaign (lasting 3 to 6 months).
- #2 Net membership gain (for period 4/1 through 3/31): Verified by NAHU
- #3 Percentage of Membership enrolled in NAHU's bank draft program (for period 4/1 - 3/31): Verified by NAHU. Documentation can be found on the NAHU website under "Members Area", "Awards", and "Awards Criteria Lists".
- #4 Contacted billed not paid list each month and sent report to state membership chair each month\*: Document with copies of each monthly report submitted to the state membership chair.
- #5 Contacted lapsed list each month and sent report to state membership chair each month\*: Document with copies of each monthly report submitted to the state membership chair.
- #6 Establish/maintain mentor program for new members\*: Documentation includes board minutes, program outlines, committee reports, flyers, and attendance lists.

## **VI. PUBLIC SERVICE PROJECTS:**

- #1 Sponsoring chapter public service projects\*: Documentation needs to include proof of promotion and activity, i.e. newsletter articles, media coverage, website coverage, meeting announcement, etc. A canceled check is not enough documentation. Documentation also needs to show the dates of event/meeting/project along with which committee members were involved and how the membership participated. Announcements to the membership, board committee reports, newsletter articles, media coverage, website coverage and meeting announcements may be used as documentation. Photographs are not considered documentation unless included in a printed format with captions and an accompanying article describing the event and identifying people in the photo. At least one project must include active involvement by the membership and not just financial contributions. Each fundraiser is considered one project.
- #2 Total dollars donated to all public service projects (for period 4/1 - 3/31):\* The total amount contributed may be documented with a treasurer's reports, cleared check(s) presented to organization, board minutes and letters from the project recipient that include dates and the amounts contributed. All projects must be completed within the awards year.

## **VII. MEDIA RELATIONS:**

- #1 Appoint a Media Relations chair: Verified by NAHU: May be documented with board minutes, reports and other communications pieces. Media Relations chair must be listed on the NAHU database.
- #2 Compile a list of local media contacts\*: List of media contacts must all of the following information: contacts name, name of the publication or broadcast station, telephone number and fax number or email address. Incomplete listings will not receive credit.
- #3 Conduct Media Outreach\*: Include copies of all letters to the editor, op-ed articles and press releases submitted. If articles are submitted to the media via email, include the cover page showing the date of submission and who the article was sent to. Faxed articles should include the fax cover page showing the date sent and recipient(s) name. The fax confirmation page provides proof that the submission was completed. Opinion editorials (op-eds) published in Health Underwriter newsletters will not be counted for points. Press releases and meeting notices are not op-ed articles.
- #4 Press Hits\*: Document with board minutes, reports and other communications pieces. Media Relations chair must be listed in NAHU's database. "Press Hits" are articles published in newspapers or other printed media. "Press Hits" must mention either the NAHU, state or local AHU chapter. Photocopies of articles printed in a regular newsletter or publication are not acceptable. The documentation must be the original news article/paper. If the name of the publication and publication date are not near the article, submit the entire page as documentation. (Do not clip the

date from the top of the page and tape to the article. It will not be counted.) Copies of articles obtained via a publication's website are acceptable if the page includes the publication's name and publication date.

**#5 Present NAHU's "Working with the Media" PowerPoint at a leadership training session\*:**

Documentation should include Board minutes with information about the event, the date of the presentation and follow-up Board minutes indicating the presentation was made. A Leadership Training Session agenda would also document the event.

**VIII. EDUCATION/AWARDS:**

**#1 Number of members receiving RHU, REBC, DIA, LTCP, CSA and CLTC (for period 4/1 - 3/31):\***

To document the chapter recipients of these designations, print the list from the Awards section of NAHU's website and highlight the chapter's recipients.

**#2 DOI approved Continuing Education hours offered by your chapter\*:** Document with an promo flyer indicating number of hours being offered, the DOI approval certificate and copies of the sign-in sheet(s). Documentation should be marked with highlighter, tabs, etc. CE hours must coincide with dates and times on the documentation. Vouchers are not accepted. If your state does not issue certificates of completion, document CE programs with board minutes, program flyers including dates presented and number of hours completed and copies of sign-in sheet(s).

**#3 Conduct an overview of NAHU website at chapter meeting\*:** Document with promo flyers/articles/emails to the membership and board minutes. Documentation needs to include the date the event and board minutes that confirm the event took place.

**#4 Number of NAHU Single Payer Program showings by chapter or member(s)\*:** Document with promo flyer(s) of the event that include dates, location and type of audience. Board meetings can also be used. Thank you letters from non-NAHU venues are also accepted. Include documentation for each program claimed.

**#5 2007 Triple Crown Award Winners\*:** Documentation can be found on the NAHU website under "Members Area", "Awards", "Awards Criteria Lists". Print the list and highlight the names of chapter members.

**#6 2007 Year LPRT qualifiers\*:** Documentation can be found on the NAHU website under "Members Area", "Awards", "Awards Criteria Lists". Print the list and highlight the names of chapter members.

**#7 Actively promoted LPRT to members\*:** Document with board minutes that include the dates and events when promo flyers or announcement distributed, copies of the promo flyers, email blasts (including the cover page showing the date of the submission and the distribution list the notice was sent to), website pages and links directing members the LPRT information on the website.

**#8 Held a Local Chapter Recognition event for chapter award recipients, new designees, membership recruiters, HUPAC donors and LPRT qualifiers\*:** Document with board minutes, announcements or newsletter articles, copy of a published "calendar of events" and website notices with the date of the chapter's recognition program. Printed programs listing members to be recognized can also be used.

**BONUS POINTS**

Bonus points will be awarded by the NAHU Awards Committee based on organization, design and appearance. This should provide an incentive to you to do an effective job to increase your chapter's chance of winning. The Awards Committee will be looking for an organized format, which includes material set up in a binder, divided into sections with tabs and clearly marked documentation. If Board minutes or other lengthy criteria are being submitted as documentation, please highlight the information to be reviewed. **Headers or footers showing board minutes and newsletters that show the type of meeting, dates of meetings or publication and page numbers are very helpful to chapter Award Chairs when organizing their award submission.**

An “excellent” submission would be highly organized, neat in appearance, creatively designed, with complete documentation, including pictures and highlights of the year. A “good” submission will be very organized, neat and easy to follow. A “fair” submission would include all the information, but not documented or organized in a manner that would be easy to follow.

# LEGISLATIVE EXCELLENCE AWARD

## Criteria & Documentation Suggestions

- I. MEETINGS & EVENTS:** Hosting a meeting means the meeting is open to members and is sponsored by the chapter. Local chapter events are not eligible for state chapter submissions. Events must be sponsored by the chapter applying for the award.
- #1 Sponsoring Day on the Hill (state) or Legislative Day Event (local): Documentation includes a copy of the program/agenda showing date of event and a list of attendees. Local chapters must provide a special legislative event that is either a separate or expanded format of their regular monthly membership meeting. If it is an expanded event, demonstrate how it is expanded. Participation in a state sponsored event does not qualify.
- #2 Registered attendees at Cap Conference: Use the list provided by national and posted on the NAHU website, in the Awards section under “Criteria Lists”. Print the list and highlight chapter members.
- #3 Hosting a chapter meeting or function that focuses on legislative/regulatory issues independent of a “Day on the Hill,” such as a CE meeting focusing on legislative issues or briefing\*: Provide a copy of the agenda with a list of attendees, and emails and/or flyers announcing the meeting. Meeting must be open to all members.
- #4 Attendance of the legislative chair on NAHU’s state and local webcasts and advanced training class: Document attendance by using the list provided by national and posted on the NAHU website, in the Awards section under “Criteria Lists”. Print the list and highlight chapter members.
- II. LEGISLATIVE COMMITTEE ACTIVITY:**
- #1 – Maintaining an active legislative committee: Documentation includes board minutes with committee reports, committee meeting minutes, emails showing solicitation of grass roots activity, and committee roster with duties of each member.
- #2 State – Regular report of legislative activity; Local – Participation on state leg committee\*: Documentation for state legislative chairs would be regional teleconference minutes documenting that the Legislative Committee (LC) submitted monthly reports and the Leg Chair was a regular attendee on monthly regional legislative teleconference calls. Documentation needed for local legislative committee communication with the state legislative committee would be board minutes, committee reports, emails from committee chair and others, etc.
- #3 Interaction with the State Insurance Commissioner’s office\*: Documentation could include board reports, letters, emails, etc.
- #4 Interaction with the State Legislators on healthcare issues\*: Documentation could include board reports, letters, emails, etc.
- #5 Hold/attend meetings with industry colleagues or health insurance coalition partners: Legislative committee and/or board meeting minutes with reports on meetings; emails, letters, etc. providing description and/or confirmation of multiple meetings
- III. GRASS ROOTS ACTIVITY:**
- #1 Develop a state-level grassroots network to serve as “key contacts”: Provide a volunteer list showing key contacts and their assigned state representatives. Documentation should also include examples of grassroots calls to action that utilizes the chapter’s key contacts, showing campaign, actual contact and reporting back to chapter.
- #2 Use of Operation Shout for state-based issues. (State only): Operation Shout Campaigns are for state-based issues. The state-based Operation Shout request must be for legitimate legislative and/or regulatory purposes and can only be initiated by the state president, state legislative chair or contract lobbyist, as per standard NAHU government relations department procedures. Documentation for

this item is an Operation Shout participation report that may be requested from the NAHU legislative department and printouts of the state's operation shout web postings.

- #3 Full or Part-Time AHU State Lobbyist Program\* (State only): Provide reports received from lobbyist on a regular basis and/or board minutes with lobbyist report of activity. Documentation may also include contract agreement with lobbyist.
- #4 Involvement in the formation and/or support of State PAC\* (State only): To document this item provide committee listing, board minutes, details of contributions to selected legislators, and/or board minutes with PAC reports.
- #5 Member support to HUPAC\*: HUPAC contributors are posted on NAHU web site in the Awards section under criteria lists. Print list and highlight participating chapter members.

#### **IV. PUBLIC RELATIONS/COMMUNICATIONS:**

- #1 Developing local media exposure on legislative issues by press releases to newspapers, letters to editor, articles in business publications, etc.: Provide published letters to the editor, reports from press releases generated by chapter, and/or articles mentioning chapter members. Make sure to include name and date of publication. Published material must mention AHU.
- #2 Holding a press conference with local media involvement\*: Provide a copy of the media advisory announcing the press conference. Photographs are not sufficient documentation.
- #3 Radio/TV appearances on health care issues\*: Appropriate documentation includes letters from station thanking you for the appearance with mention of the subject matter, and board minutes including report of event. Provide show announcement and document that event occurred
- #4 Quarterly legislative communication piece sent to all chapter members\*: Provide original printed pages or inserts on legislative news or copies of each special faxed, emailed or website legislative bulletin for each month. Notices generated by NAHU will not be counted.

#### **V. OTHER:**

- #1 Attendance at Congressional In-District Town Hall Meetings\*: Submit announcement and include documentation on time, location and subjects discussed, as well who attended.
- #2 Other special legislative activity or involvement\*: List details of other specific activity (i.e. political campaigns, serving on special committees, etc.)
- #3 HUPAC Chair serves on Board of Directors: Verified by NAHU.

# **MEDIA RELATIONS AWARD**

## **Criteria & Documentation Suggestions**

### **CRITERIA;**

- #1 Appoint chapter media relations chairperson: Will be verified by NAHU.
- #2 Compile list of local media contacts\* (including print and broadcast): The list of local media contacts must contain all information requested; including contact name, publication or broadcast station name, phone, and fax or email address. If all items are not included the list will not be counted for points.
- #3 Present any of NAHU's "Working with the Media" PowerPoint presentations (found on website) at a chapter, strategic planning meeting or state/local leadership training meeting\*: Provide the agenda/program for the meeting which shows the date, time and place and a list of attendees.
- #4 Attendance of NAHU's Working with the Media" webcast teleconferences\*: Teleconferences with media training content are broadcast quarterly. Points awarded by chapter participant. Verified by NAHU.
- #5 Create and distribute a press kit\*: Provide a copy of your press kit and document how it was distributed.
- #6 Sending press releases to media contacts\*: Provide copies of press releases and who they were sent to.
- #7 Send photos with press releases\*: Provide copies of photos and related press release, as well as who they were sent to.
- #8 Send media advisories to reporters announcing chapter events\*: Provide copies of media advisories and who they were sent to.
- #9 cc NAHU's media relations staff within 30 days on press releases, media advisories and other communications with the media: Verified by NAHU.
- #10 Submit letters to the editor to local publications\*: Provide copies and indicate distribution.
- #11 Submit op-ed articles to local publications\*: Provide copies and indicate distribution.
- #12 Press "Hits": Information published in news articles or features must mention either the national, state or local chapter of Association of Health Underwriters. In general all articles submitted for documentation need to include the publication name and the date of publication. Original copies should be submitted whenever possible. State and local organizations can discuss their position in broadcast appearances, as long as it does not conflict with NAHU's position.
- #13 Extra points for comprehensive media lists, quality of written materials, and innovative ideas to attract media attention for your chapter or the association\*: Include a description of the item and indicate why it is worthy of extra point credit.

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### ***THE MEDIA PIECES:***

Specific descriptions of the various media pieces, as supplied by NAHU Media Relations staff, follow:

#### **Press Release - Announcing the News**

*Used to release a statement, comment on legislative issues, summarize an event*

The press release is the most commonly used public relations tool to announce news to the media. The most effective release conveys legitimate news – information previously unknown. It works best to relay such things as key developments within the industry; policy or legislative initiatives at the local, state or federal level; or recent news occurring in your state or local chapter (“Day on the Hill” meetings with governors or legislators, awards, charitable activities, member achievements and professional achievements).

## **The “Media Advisory” – Announcing an Event or Reacting to News**

The media advisory is an effective communications vehicle for advising the media about an upcoming event or announcing that a member has been asked to testify and is available for interviews on the subject matter. The format of the media advisory is more defined in terms of who...what...when...where.

## **Editorial Page Options**

There are three basic vehicles for expressing an opinion in the newspaper:

- An “**editorial**” prepared by the newspaper editorial staff that communicates the official position of the publication on an issue
- A “**letter to the editor**” is a means available for all citizens in the community to respond or react to a news article or editorial that has appeared in their local newspaper
- An “**op-ed**” or opinion piece that is written and submitted by someone not on the newspaper’s editorial staff. The placement of some “op-ed’s” is paid for and considered somewhat as an editorial advertisement. While very expensive, these placed editorials can be effective if the content is issue-oriented rather than commercial. The more common and credible op-ed, however, is one the newspaper decides to publish on its own merits that has been written and submitted by a member of the community or an expert in a particular field related to the issue.

## **WHEN AND HOW TO USE THE TOOLS**

### **Press Release: Announces “NEWS”**

- Include contact information and date of release
- Include an eye-catching ‘headline’ that captures the “essence” of the news
- Describe the “core” news message in first paragraph (who, what, when, where, why)
- Expand the news story in following paragraphs
- Include a quote from a recognized spokesperson in the organization
- Close with a “boilerplate” paragraph about the organization announcing the news
- Limit to 1 or 1-1/2 pages

### **Media Advisory: Announces an upcoming “NEWS EVENT” or offers a resource person to address a current “HOT ISSUE”**

- Include an eye-catching “headline”
- Distribute several days in advance of the news event
- Use a “What, When, Where, Why” format
- Bullet the main points
- Provide contact information and date

### **Letter to the Editor: Responds to an article or editorial that has appeared in a publication**

- Make certain it relates directly to the topic
- Include name of article, date and page for reference
- Be concise and brief
- Share your unique perspective
- Give examples
- Close with your name, title and affiliation
- Advance Chapter approval required, if identified

**Photograph:**

- Attach a “cut-line” to the photo that identifies the person(s) in the photo and describes what is pictured
- Include with appropriate news announcements (promotion, awards, partnerships)
- Ask the reporter how they want the photo sent to them

**Op-Ed: An “OPINION PIECE” submitted by an individual or on behalf of an organization to a publication.**

- Placement can be paid for or a publication may decide to publish on its own.
- Needs to be linked to a topical issue of interest
- Offers a unique perspective
- Is brief (usually 300-600 words).
- Includes name of author and affiliation.

**Bylined Article: A lengthier article (Primarily used in trade publications) authored by an organization’s staff or member on a topical issue**

- Offer to write an article for the publication
- Do not prepare an article without discussing it with the editor

Sample formats of the referenced media pieces can be found on the NAHU website. An additional resource to assist in applying for this award is the PowerPoint presentation “Understanding the Media Relations Award Criteria” available on NAHU’s website in the **Media & Communications** section under **Media Relations Tools**; <http://www.nahu.org/media/tools.cfm>

# **STATE WEBSITE AWARD**

## **Criteria & Documentation Suggestions**

No documentation is required for this award. You must complete and submit the online application form and score sheet. The committee reviews and judges the award application online while viewing the chapter's live website.

### **Section I: Home Page**

The Home Page should contain the listed items as sections indicated on the front page and reachable through the site navigation tools.

### **Section II: Chapter Benefits**

The web site should contain a section for Chapter Benefits that contains the listed items reachable in no more than two clicks. Find an Agent is a link to the NAHU web site. LPRT information should include a link to NAHU's LPRT section. Member Benefit Information should be chapter specific. Section V of this award gives points for a link to NAHU's member benefits information so that would not count here.

### **Section III: Information About the Chapter**

Note that several of the requirements in this section receive extra points if past versions are available through archives.

### **Section IV: Legislative Information**

PAC Information should include a donation form and a link to HUPAC information at NAHU.

### **Section V: Membership**

Membership information should include chapter-specific information as well as a link to NAHU's membership benefits section.

### **Section VI: News and Programs**

Continuing Education information should include upcoming events where CE credit is offered and/or resources for local chapters who wish to offer CE credit hours.

### **Section VII: Website Structure**

The purpose of keyword tags is to cause your web site to appear when certain searches are performed on a search engine. They are placed in the source code for your web site. To document these keyword tags, go to your web site; click on "View" then on "source" or "page source". Keyword tags will appear at the top of the source code. Print the first page containing the tags.

# **LOCAL WEBSITE AWARD**

## **Criteria & Documentation Suggestions**

No documentation is required for this award. You must complete and submit the online application form and score sheet. The committee reviews and judges the award application online while viewing the chapter's live website.

### **Section I: Home Page**

The Home Page should contain the listed items as sections indicated on the front page and reachable through the site navigation tools.

### **Section II: Chapter Benefits**

The web site should contain a section for Chapter Benefits that contains the listed items reachable in no more than two clicks. Find an Agent is a link to the NAHU web site. LPRT information should include a link to NAHU's LPRT section. Member Benefit Information should be chapter specific. Section V of this award gives points for a link to NAHU's member benefits information so that would not count here.

### **Section III: Information About the Chapter**

Chapter archives should contain such information as past newsletters, board minutes, financial reports, lobbyist reports, etc.

### **Section IV: Membership**

Membership information should include chapter-specific information as well as a link to NAHU's membership benefits section.

### **Section V: News and Programs**

Continuing Education information should include upcoming events where CE credit is offered. Professional Development programs would include certifications such as RHU and REBC. Other education suggestions can be found at <http://www.nahu.org/education/conteducation.cfm>.

# WILLIAM F. FLOOD PUBLIC SERVICE AWARD

## Criteria & Documentation Suggestions

Select a single public service project to highlight in your submission to the Awards Committee. This would be a project that requires physical participation by the membership vs. a project where the goal is a money donation to a particular organization.

Please include a brief narrative (no more than one page) about your project, including a description of the project, the benefactor of your project, the type of community service, your association's goals and objectives, and the final outcome of the project. **BRAG A LITTLE!!** Pictures will help to convey your story, but be sure to include captions for the pictures (include the date(s), identify the people in the picture, location and/or what the picture is documenting).

*(Note: The pictures do not have to be "published pictures" as indicated in other award submissions.)*

### Criteria:

1. **Did a Public Service Committee plan this project?** Documentation could be a record of the committee's work including: a list of committee members, minutes of the meetings, agenda's details of the work completed and who participated, as well as committee reports to Board of Directors.
2. **Were chapter members surveyed for new project ideas or an evaluation of past project made to obtain feedback and additional suggestions?** Surveys encourage input from the general membership as to the type of Public Service projects the membership would support and also encourages the participation of the membership in the project(s). An evaluation form included as part of the survey on past projects would also be valuable to the Public Service Chair on what did or did not work in the past. Provide a copy of your Public Service survey, feedback form, a summary of the survey results, etc. Other documentation could be board minutes, Public Service committee reports, notices to the membership (newsletters, etc).
3. **How were chapter members and/or public notified?** Provide copies of all announcements made to the membership. Include copies of chapter newsletter, monthly meeting announcements, website page, new member orientation program and/or handouts, save the date cards and/or invitations mailed, invitation mailed to the organization being spotlighted by the project, press releases or press hits, newspaper announcement or articles that points are being taken for. Make sure you indicate what the date each announcement was made and how it was circulated.
4. **How long did your committee work on this project?** Document dates by submitting agendas, board meeting minutes, committee reports, strategic planning meeting minutes, e-mails, etc.
5. **How the project was conducted.** Document whether the project is an independent chapter project or a joint project by submitting board meeting minutes, committee reports, agendas, emails, etc.
6. **Number of Association members participating in project.** Documentation of member participation in your project could include a list of committee members, attendance list identifying the names of members at or working the event, a list of contributing members, summary of survey indicating number of responses received, etc.

7. **List other public service projects your chapter has participating in during this award year.** This section is for additional projects that are primarily monetary donations made to community service/charitable organizations. Documentation for each additional project must be submitted. Documentation could include board minutes, committee reports, announcements made to membership (meeting agendas, newsletters, email flyers), etc. Appropriate documentation of monetary amounts would include thank you letters from the beneficiary organization listing the monetary amount, signed letter of transmittal from the chapter president stating the amount, treasurer reports, copies of checks and newsletter articles, etc.
8. **Total amount of money actually contributed to beneficiary organizations from ALL public service projects (net).** Documentation could include treasurer reports, project financial reports, promotional ceremony agendas, media coverage, newsletter articles, canceled checks, thank you letters from the organization(s), chapter letters of transmittal, etc.
9. **Did the project get any media coverage?** Documentation could include press releases, press hits, newspaper and newsletter articles, promotional activity via mail, emails, websites, etc.
10. **Was there formal recognition given to the project?\*** **Was a special presentation ceremony held at the conclusion of the project?\*** Documentation could include copies of thank you letters, pictures of the event/ceremony, pictures of plaques or awards given or received by the chapter, agendas, board meeting minutes listing the formal presentation, newspaper articles, newsletter reports, etc.

**ADDITIONAL NOTES:**

- It is suggested that winning chapters have at least ONE major Public Service project that includes the physical participation of the members and TWO minor projects that focus mainly on monetary contributions to community service / charitable organizations.
- Major project suggestions are: Golf tournaments, Toys for Tots, Food Drives, Habitat for Humanity, Community Volunteer Days, charity auctions, etc.

# **ROBERT W. OSLER EDUCATION AWARD**

## **Criteria & Documentation Suggestions:**

### **I. EDUCATION COMMITTEE**

- #1 Appoint an education chair: Verified by NAHU
- #2 Active education committee\*: Provide minutes from committee meetings, board meeting minutes, etc.
- #3 Education chair attended education session at regional meeting\*: Highlight education chair's name on regional meeting attendance list. Lists are posted on NAHU website in Awards section under "Criteria Lists".

### **II. PROGRAMS & EVENTS**

Since many events are produced through a cooperative effort of state and local chapters, distinction that the event was sponsored by your chapter must be clear in the documentation provided.

- #1 Total Number of Continuing Education Hours Offered by Chapter\*: DOI APPROVED continuing education hours must be documented with an announcement flyer indicating number of hours offered and the DOI approval certificate. Please mark documentation with highlighter, tabs, etc. CE hours must coincide with dates and times on the documentation. Vouchers are not accepted.
- #2 Hosting a Sales Symposium/Convention or Special CE Seminar\*: The Sales Symposium/Convention or Special CE Seminar must be special event, offering multiple CE hours, and not coincide with a regularly scheduled membership meeting. DOI approval certificates are required, along with flyers, board minutes, articles or promotional information in chapter newsletter showing the time, date and place the event occurred and a list of attendees.
- #3 Number of educational courses held/sponsored by chapter (for period 4/1 - 3/31):\* **Courses** do not have to be CE qualified. Accepted documentation: flyers, board minutes, articles or promotional information in chapter newsletter, committee reports, etc. Time, date and location courses were conducted must be included in the documentation.
- #4 Holding three or more qualified educational sessions\*: Qualified topics include disability, long term care, COBRA, HIPAA, voluntary products, legislation, HSAs, Medicare, Social Security, worksite marketing, Section 125 Flex/Cafeteria plans, CDHC, The Uninsured, Single Payer, etc. Points based on complete documentation for each of the education topics/programs listed. The programs must be documented with an announcement flyer, board minutes, articles or promotional information in chapter newsletter or other publications including time, date and place. Sessions do not have to be DOI approved.

### **III. PROFESSIONAL DEVELOPMENT**

- #1 Number of members receiving designations (for period 01/01 - 12/31):\* The recognized designations are RHU, REBC, EHB, DIA, LTCP, CSA, and CLTC. To document the chapter designation recipients, print the list available in the Awards section of NAHU's website and submit with member names highlighted. Other documentation would include notice of designation by education facility attended.
- #2 Number of NAHU endorsed designation courses held by chapter (for period 4/1 - 3/31):\* Education programs must be documented with an announcement flyer indicating number of hours offered, board minutes, articles or promotional information in chapter newsletter including time, date and place, and the DOI approval certificate, if applicable in your state. Recognized designations are: RHU, REBC, EHB, DIA, LTCP, CSA, CLTC.

#### **IV. USE OF NAHU EDUCATIONAL RESOURCES BY MEMBERS**

- #1 Number of members signing on for NAHU legislative and/or education webcast program (for period 4/1 - 3/31):\* NAHU's education department will provide attendee lists upon request. Provide a copy of this list with chapter members highlighted.
- #2 Presented NAHU "Education Resources" PowerPoint at a leadership or strategic planning meeting\*: To document the presentation of the education PowerPoint submit a copy of the meeting notice, announcement or flyer, promotional information in chapter newsletter including time, date and place, agenda or program, and board minutes indicating time, date and place the presentation occurred.
- #3 Education session on NAHU resources, Using the NAHU website, etc.\*: Submit a copy of the meeting notice, announcement or flyer, promotion in chapter newsletter including time, date and place, agenda or program, and board minutes indicating time, date and place the presentation occurred.
- #4 Leadership session for officers and members\*: Submit a copy of announcement, flyer promotion in chapter newsletter, agenda or program, and board minutes. Documentation must indicate date, time, and place the presentation occurred and show that meeting content was leadership training.

#### **V. MEDIA OUTREACH**

- #1 Submit media advisories to the press regarding chapter educational courses/programs\*: Submit copy of press advisory sent to the media. Make sure it is dated and includes distribution info.
- #2 Press hits regarding chapter's educational courses/programs\*: Provide an original copy of the article informing the general public of the course/event/program **sponsored by the chapter**. Make sure the documentation includes the publication's name and the date. Publications in state and local NAHU newsletters do not satisfy this criterion.

#### **VI. PUBLIC OUTREACH AND AWARENESS**

- #1 Presentations on health insurance topics, the Role of the Agent, legislation, etc. by members to non-industry non-member groups\*: Documentation would include invitation and/or thank you/acknowledgement letters or e-mails, program/agenda with date, time and place of presentation.
- #2 Presentations on health insurance topics, NAHU positions, legislation, etc. by members to industry non-member groups\*: Documentation would include invitation and/or thank you/acknowledgement letters or e-mails, program/agenda with date, time and place of presentation..
- #3 Number of educational programs/events attended by non-industry non-members, such as clients, public invitation, media announcement, etc.\*: Document with sign-in sheets, acknowledgement letters, invitations, media advisories, press hits, etc. Documentation must provide date, time and location of event or program.
- #4 Educational presentations on health insurance topics, the Role of the Agent, NAHU positions to legislators or regulators\*: Document with invitation and/or thank you/acknowledgement letters or e-mails, program/agenda, sign-in sheets, media advisories, printed articles, board minutes, etc. Documentation must include date, time, location of event or program and list of attendees.

#### **VII. MAINTAINING AN EDUCATIONAL WEBSITE**

- #1 Website has consumer education section\*: Make sure this section is clearly labeled and accessible from the home page.
- #2 Website has Matrix, S-Chip, High Risk Pool, etc. postings\*: Include location of this information on the application.
- #3 Local chapter website links to state website consumer section\*: For local chapters only. Must be accessible from the home page.
- #4 State chapter links to local chapters\*: For state chapters only. Must be accessible from the home page.

## **Section 6. Individual Award Criteria and Documentation Suggestions**

*(Spirit of Freedom, William G. Wetzel, Legislative Achievement, Distinguished Service, Presidential Citation)*

### **SPIRIT OF FREEDOM LEGISLATIVE AWARD**

#### **Criteria & Documentation Suggestions**

This award is based on activity at the **state and federal** level. This high honor is bestowed on an individual who has a record of outstanding service in state and federal legislative work over an extended period of time. Qualifying activities are those that build relationships with legislators that directly impact public policy; actively taking the NAHU message to key media outlets; and developing strong grassroots initiatives. Candidates may be nominated by an individual member, chapter or by the Legislative Council.

To nominate your candidate, submit a detailed narrative (2,000 word limit), outlining your candidate's accomplishments. Provide documentation to support statements made in the narrative. Summarize any large amount of documentation. Please do not submit an entire law that may have been written with support or efforts of a nominated individual.

#1 Eligibility. Anyone who has been an individual NAHU member for two or more years and meets the criteria for this award is eligible. However, since this award is intended for outstanding service over an extended period of time, this will be awarded to a member only once in a lifetime. Paid lobbyists are not eligible. Verified by NAHU.

#2 Criteria: To be considered for this award, the individual member must have:

- participated in committees or working groups involving federal legislation;
- made repeated presentations to groups on federal legislative issues;
- actively participated in NAHU Capitol Conferences;
- obtained national media attention or displayed extensive involvement in promoting NAHU's legislative efforts;
- developed strong grass roots initiatives through involvement and support of HUPAC, serving as a key legislative contact and promoting our lobbying efforts; and
- performed other outstanding legislative service for the association.

A description of your candidate's achievement of these criteria should be described in the narrative enclosed as part of the application. Documentation of these activities is required.

# **WILLIAM G. WETZEL PUBLIC SPEAKING AWARD**

## **Criteria & Documentation Suggestions**

During the period April 1 through March 31, the applicant must make a minimum of five presentations relating to health care; covering such topics as legislation (state, local and/or national), disability, sales/motivation, dental, long term care, compliance issues, seminars or other miscellaneous allied health care/legislative issues. The presentation must be made to insurance industry and/or community organizations and must be sponsored or recommended by their local or state association. Each appropriately documented presentation is worth 10 points.

Documentation may be difficult without the assistance of the presenter. They may need to help collect the documentation necessary to meet the criteria.

### **Criteria:**

1. Multiple presentations of the same topic are allowed but there must be three separate topics in the total. A minimum of five presentations are required.
2. When presentations are made to non-AHU members, AHU must be mentioned in the presenter's credentials.
3. Proof must be provided (with sign-in sheets or evaluations) that the presentation occurred. Evaluation forms can be produced by the hosts or by the presenter. The Speakers' Verification form is completed by the host of the presentation.
4. Each presentation submission must have an outline attached, even if it is a duplicate of another submitted presentation.
5. At least 75% (or 5, whichever is greater) of the presentations must have some form of feedback from the attendees. This can take the form of a letter of testimony from the organization who hosted the event, or evaluation forms. If Criteria #4 is met by evaluation forms for 75% of the presentations, that will satisfy this criteria as well.

# **LEGISLATIVE ACHIEVEMENT AWARD**

## **Criteria & Documentation Suggestions**

Submit a detailed narrative summary (2,000 word limit) outlining your candidate's accomplishments, using the application criteria as a guideline. Nominations may be submitted by individual members, chapters, or by the Legislative Council.

Because this award recognizes outstanding service over an extended period of time, a member who has been awarded a Legislative Achievement Award within the last five years is ineligible. Paid lobbyists are not eligible. Supporting documentation of statements in the narrative is required. If communications are used as documentation, please make sure it is clear who the author is (provide title or role in event/circumstance, etc). This information greatly aids the Awards Committee in its review of the application and allotment of points.

### **Criteria:**

- #1** Candidate must be an individual NAHU member for one or more years: Length of membership stated in narrative will be verified by NAHU.
- #2** Active involvement on state/local legislative committee(s)\*: Provide copies of committee minutes, board reports/minutes, special reports, sign in sheets, e-mail communications, etc.
- #3** Participation in State Key Contact program\*: Provide Key Contact list and evidence of candidate's activity.
- #4** Consistent attendance at Day on the Hill or Special Legislative Day Event\*: Provide copies of sign-in sheets, attendee lists, minutes, emails, CE certificates, etc.
- #5** Involved in planning and implementation of a Day on the Hill or Special Legislative Event\*: Documentation could include letters/emails of appreciation for working on the planning; board minutes, committee reports and/or communications, etc.
- #6** Strong liaison with State Insurance regulator and his/her staff\*: Provide copies of communications, such as emails, letters, etc.; board minutes, committee reports, etc.
- #7** Strong interaction with State Legislators\*: Submit copies of communications, such as emails, letters, etc.; board minutes, committee reports, etc.
- #8** 10x12 or \$120 Contribution to State PAC\*: Confirmed by letter or email from PAC committee, Chapter President, or a copy of the list of contributors showing dollars given for each year.
- #9** 10x12 or \$120 Contribution to HUPAC\*: Will be verified by NAHU
- #10** Participation in State, Regional and National legislative leadership workshops\*: State and regional participation may be documented by sign-in sheets, letters, board minutes, etc. Attendance at national and some regional worksheets will be verified by NAHU.
- #11** Regular attendance at NAHU Capitol Conference (at least three years)\*: Verified by NAHU.
- #12** Contributed legislative information for newsletter and/or website to improve legislative communication to members\*: Provide copies of communications generated by your candidate – such as emails, letters, position papers, reports, etc. Documentation could also include printed programs, board minutes, the newsletter and/or website showing contributions.
- #13** Other areas of outstanding legislative service including involvement in the political arena outside of NAHU\*: Clearly describe achievements in narrative and provide appropriate documentation.

# **DISTINGUISHED SERVICE AWARD**

## **Criteria & Documentation Suggestions**

Since this award recognizes outstanding service over an extended period of time, a member who has been awarded a Distinguished Service Award within the last five years is ineligible. Any member who received a Distinguished Service Award and is reapplying is only eligible based on activities, events and/or special services that occurred in the previous five years of membership. No points may be given for activity used to satisfy the criteria for the individual's previous Distinguished Service Award.

Members may be nominated by an individual member or chapter.

To nominate your candidate, submit a detailed narrative (2,000 word limit) outlining your candidate's accomplishments with the completed nomination/application form and criteria checklist. Your nomination should provide information about your candidate and documentation detailing their specific accomplishments and their achievement of the award attached to the application. Use the application and criteria checklist as a guideline in organizing your submission. Documentation must be provided for items in the Criteria Checklist marked with an asterisk (\*), even if they are mentioned in the narrative. Be clear about the points being taken for credit; provide specific details.

- #1 Continuous association membership: Will be verified by NAHU.
- #2 Current and past industry association affiliations\*: Refers to non-NAHU organizations. Submit announcements, flyers, etc., from the organization describing the nominee's participation.
- #3 Levels of NAHU service\*: Points are accumulated for each position, for each year of service. Submit Board minutes documenting positions held by nominee or a letter from a current or past officer of the association verifying positions held by nominee.
- #4 Public service and community activities\*: Non-industry related groups such as rotary clubs, service organizations, church activities, etc. Submit church bulletins, minutes from meetings, newsletter articles, letters from organization documenting position and type of service provided by nominee.
- #5 State, Regional and/or national conferences or meeting\*: Submit a list of events attended. Attendance at National events will be verified by NAHU. RVP documentation required for verification of attendance at Regional events.
- #6 Association and/or industry awards\*: NAHU or non-NAHU awards: Individual awards presented at the state and local levels are eligible with accompanying documentation (Board minutes, meeting announcements, newspaper articles, letters from current or past officers, etc.)
- #7 Professional industry designations\*: Submit list of designations obtained. Will be verified by NAHU
- #8 Past or current LPRT award winner\*: Submit list of years qualified. Points are accumulated per year to a maximum of 14 (lifetime status). Will be verified by NAHU.
- #9 Industry involvement\*: NAHU participation, serving on insurance committees, special insurance task forces, etc.; submit Board minutes, committee reports, newsletters, letters, etc.
- #10 Miscellaneous\*: Industry related only. Points given for industry-related speaking engagements, articles published, radio and/or TV appearances, or association special projects. May include NAHU and/or Non-NAHU items but each must be health insurance industry related; submit minutes, official meeting notes, testimonial letters, etc. as documentation.
- #11 Triple Crown Award winner\*: Submit letter stating years qualified. Will be verified by NAHU.

# PRESIDENTIAL CITATION AWARD

## Criteria & Documentation Suggestions

The president and board members should select which criteria will be satisfied at the beginning of the association year. The selected criteria should be incorporated as goals or objectives in the chapter's strategic plan for the new association year. Nine of the 17 criteria need to be met, but to increase the chapter's odds of receiving this award it is highly recommended that more than nine criteria be satisfied.

To prepare the nomination, indicate which criteria your association met in the qualifying period and list them in a table of contents. Create sections (using tabbed dividers) in your submission binder for each numbered criteria. Behind each tabbed section, provide documentation based on the requirements listed below for those criteria (For example, the first tab would be labeled: Criteria #1 – Membership Increase).

**Item #1 – Membership Increase:** Will be verified by NAHU.

**Item #2 – Speakers Bureau: Submit** a list of Speakers and their topics, along with letters to different organizations requesting the opportunity to speak. The letters should be on Chapter Letterhead.

**Item #3 – Healthcare Legislative Presentations:** Documentation should be provided for all 20+ presentations. Documentation can include minutes, newsletter articles, board reports, or an agenda from the day's event. If done as a CE, documentation can also include a CE Certificate. Documentation should also be included that the presenter(s) are members of your chapter.

**Item #4 – “Day with Congressional Leaders”:** The Day with Congressional Leaders must be with legislators, not insurance regulators. Submitted event must be an event sponsored, organized, and held by your own chapter. The event cannot be one sponsored by another chapter even if your members helped to organize the event; or one that is held in your city, but sponsored by another chapter. For instance, a state event cannot be submitted by a local chapter just because it was held in the local chapter's city, nor because local chapter members helped with the function. Also, a state association cannot submit an event sponsored by a local chapter just because state representatives attended the event and state officers helped with the function. Submit a copy of the announcement showing it is your chapter-sponsored event, along with documentation that the event actually occurred. Documentation can include minutes, newsletter articles, board reports, or an agenda from the day's event.

**Item #5 – Meeting with Domiciled Insurance Companies:** Provide documentation that the event was chapter sponsored, supported or participated in by your chapter, along with a list of attendees and their chapter/company affiliation, and documentation that the event occurred. Documentation can include minutes, newsletter articles, board reports, or dated thank you letters from the insurance company attendees.

**Item #6 – Media Campaign:** Must show documentation of campaign. Documentation should include letters or emails sent to media contacts, requesting the opportunity to discuss healthcare issues or to take part in radio talk show on health issues.

**Item #7 – Media Relations Committee:** Submitted press releases must be chapter designed and sponsored. Documentation for the 20+ press releases should include the name of the media contact to which the press releases were sent. The same press release to different media contacts only counts as one press release. Documentation for forming a Media Relations Committee can include minutes or board reports.

**Item #8 – Meet with State Legislators:** Documentation can include items such as newsletter article, minutes, board reports or a follow-up letter from the legislator. Letters must mention AHU.

- Item #9 – Meet with State Insurance Commissioner:** Documentation can include items such as newsletter article, minutes, board reports, dated follow-up letters from the regulator, emails or any item that confirms your visit. Letters must mention AHU.
- Item #10 – Continuing Education Program or Fundraiser:** The Continuing Education program **must** be a NAHU generated presentation. Eligible programs can be found in the education section of NAHU's web site ([www.nahu.org](http://www.nahu.org)) at <http://www.nahu.org/education/conteducation.cfm>. Presentations generated from your local or state association will not count. Submit a copy of the announcement showing it is a chapter event, along with documentation that the presentation actually occurred, and non-members were invited or attended. Documentation can include minutes, newsletter articles, board reports, sign in sheets, CE Certificate, and/or an agenda from the day's event.
- Item #11 – Public Service Project:** Include copies of the minutes, newsletters, e-mails or flyer announcements explaining the Public Service Project. Submit a copy of the announcement showing it is a chapter-sponsored event, along with documentation that the event actually occurred. Documentation can include minutes, newsletter articles or board reports.
- Item #12 – Association Social Event:** Submit a copy of the announcement or invitation, showing it is a chapter-sponsored event, along with documentation that the event actually occurred, and non-members were invited. Documentation can include minutes, newsletter articles, or board reports.
- Item #13 – Members Contact with Legislators:** Documentation should be REQUESTS FOR MEMBERS to contact state and/or national legislators not the actual postcard, e-mail or letter that the members send. All four requests must be documented. Provide a copy of the requests on luncheon agendas, chapter letterhead, or chapter sponsored fax or emails.
- Item #14 – Members Contact with Carriers:** Documentation should be REQUESTS FOR MEMBERS to contact carriers for support, not the actual letter, email or postcard that the members send. All three requests must be documented. Provide a copy of the requests on luncheon agendas or other dated material from chapter meeting.
- Item #15 – Recruitment & Retention Ideas:** The membership gain report from the NAHU website will not be accepted as proof. Documentation of ideas used to recruit and retain members can be documented by newsletter articles, minutes, board reports and/or emails describing activities that took place. If a membership contest is used, please document the rules and winner(s).
- Item #16 – Triple Crown Award:** Will be verified by NAHU
- Item #17 – HUPAC Contributions:** Will be verified by NAHU
- Item #18 – LPRT Campaign:** Documentation should be newsletter articles, announcements or flyers and the method of distribution to membership along with the distribution list.
- Item #19 – Silver Seal:** Will be verified by NAHU
- Item #20 – 100% Board:** Will be verified by NAHU
- Item #21 – Annual Summary Report:** Documentation should include the report, method of deliver and distribution list.

## **Section 7. Celebrate Your Success...**

Your chapter had a great year and was chosen as one of the top associations!

Make sure to recognize everyone who worked hard to make it happen. Let the membership know how great the chapter is and thank them for their support.

Celebrate your success by:

- Displaying the award banner at monthly membership meetings and events.
- Including an announcement in the chapter newsletter and post the news on its website.
- Sending a special broadcast fax or e-mail bulletin to the membership.
- Having an award recognition ceremony in conjunction with the regularly scheduled meeting or as a separate planned event.
- Issue a press release to various media contacts.

Your chapter is on the road to success and there is no turning back. Your association will grow and there will be a renewed interest from members to get involved. And, you will feel a great sense of pride in your accomplishment!

## **Section 8: Appendix**

### **Awards Committee Contact and Regional Chairs**

#### **Chair**

Bill Hartman  
Phone: (260) 483-2305  
bill@hartmanmarketing.com

#### **Vice Chair**

Linda Rose Koehler  
Phone: (925) 918-2477  
Fax: (925) 245-1325  
lkoehler@cimsga.com

#### **Region 1 & 2**

Marilyn Van Sant  
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#### **Region 3**

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#### **Region 4**

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#### **Region 5**

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#### **Region 6**

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#### **Region 7**

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jtm7105@aol.com

#### **Region 8**

Joan Bumgarner  
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Fax: (818) 735-8605  
mammalaahu@roadrunner.com

#### **BoT Liaison**

Mel Schlesinger  
Phone: (336) 774-3075  
Fax: (866) 344-2064  
mel@effortless-selling.com

#### **Staff Liaison**

Brooke Willson  
Phone: (703) 276-3812  
Fax: (703) 841-7797  
bwillson@nahu.org

NAHU Leadership Commitment Form

# NAHU Leader Commitment Form



I, \_\_\_\_\_ agree to perform the responsibilities and duties required of my position on the Awards Committee for 2007- 2008. I have been provided a job description and understand what the expectations of my position are. I will participate in all meetings and teleconferences as scheduled for my committee to the best of my ability.

I know that the success of my committee will impact all members of NAHU. I will seek to promote the best interests of our membership.

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Signature

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Date

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Position

## Strategic Planning Spreadsheets

### *Strategic Planning Spreadsheet-Landmark (in criteria order)*

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Pnts Earned</b>	<b>Notes</b>
<b>NAHU Events</b>				
Registered Delegates to 2007 Convention	All	25 Each delegate - max 3		
Each additional attendee to 2007 Convention	All	5 each attendee - max 10		
Legislative Chair Attending 2008 Cap Conf.	Legislative	75 points		
Each additional attendee to 2008 Cap Conf	All	5 each attendee - max 10		
Annual Regional Mtg 2008 Attendance (RLC)	All	20 per attendee - max 6		
Membership & Retention Chairs attending 2008 RLC	Membership	25 points		
Membership & Retention Chair attending 2007 Convention	Membership	25 points		
President-Elect attending 2008 Leadership at Cap Conf	President	150 points		
<b>Chapter Management</b>				
Development/Publication of State By-Laws	President	25 points		
Development/publication of State Policies & Procedures	President	25 points		
Development/Publication of Strategic Plan to member	President	50 points		
Published Annual Summary Report of chapter activities to members demonstrating value of membership	Communications	50 points		
IRS approved Tax-exempt status	President	25 points		
Publication annually of approved state budget	Treasurer	25 points		
Publication annually of approved state profit/loss financial statement	Treasurer	25 points		
Incorporation papers	President	25 points		
Liability Insurance for state officers	President	25 points		
Purchase of liability insurance for state events	President	25 points		
100% Board Recruitment Award	Executive Cmte	100 points		
Perpetual State Chapter Award program honoring members and/or chapter achievement	Awards	100 points		
Silver Seal Certification	Awards	100 points		
Develop New Agent outreach program involving local chapters to mentor and recruit new agents into industry	Membership	100 points		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Pnts Earned</b>	<b>Notes</b>
<b>State Meetings/Events</b>				
State Convention	Events	100 points		
State Leadership Conference	President	150 points		
State Strategic Planning Session	President	Annually - 50 points 2 or more a year - 100 points		
Board Meetings	President	10 points each - max 12		
<b>State Communications</b>				
State Newsletter	Communications	10 points each - max 12		
Maintain State Website	Technology	125 points		
Email or fax distribution to membership	Communications	Fax - 25 points Email - 50 points		
Conducted Member Needs Survey, separate from evaluation sheets distributed at events	Communications	50 points		
<b>Legislative Activity</b>				
Regular legislative communications sent to all members	Legislative	50 points		
Active Legislative Committee	Legislative	150 points		
AHU State Lobbyist (full or part time)	Legislative	125 points		
Membership participation in STATE PAC	PAC	10-20% - 10 points 21-40% - 20 points 41-60% - 30 points 61-80% - 40 points 81% or more - 50 points		
Membership support to HUPAC	Legislative	5% - 10 points 6-10% - 20 points 11-20% - 30 points 21% or more - 50 points		
Hold meeting with State DOI and/or other reg bodies	Legislative	25 points each - max 2		
Holding a state legislative conf or "Day with Legislators"	Legislative	75 points		
State-based Operation Shout	Legislative	1 state-based campaign - 15 pts 2 state-based campaigns - 30 pts 3 or more - 50 points		
Hold/attend meetings with industry colleagues or health insurance coalition partners	Legislative	25 points		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Pnts Earned</b>	<b>Notes</b>
<b>Membership</b>				
Chartering Chapters	Chapter Develop	1 - 100 points 2 - 150 points 3 - 200 points		
Net State Membership Gain	Membership	31% or more - 250 points 26 - 30% - 200 points 21 - 25% - 150 points 11 - 20% - 100 points 6 - 10% - 50 points 1 - 5% - 10 points		
Active Membership Campaign	Membership	1-day blitz - 25 pts Ongoing campaign - 25 pts Recruitment materials, flyers, brochures, gifts - 25 pts Retention drive - 25 pts		
Membership Chair on monthly regional membership teleconferences	Membership	10 points each - max 12		
Retention Chair on monthly regional membership teleconferences	Membership	10 points each - max 12		
Contact with local chapters about follow-up retention activities each month with report to BOD	Membership	10 points each - max 12		
<b>Education/Awards</b>				
Host state education/professional development	Education	100 points		
Actively promote LPRT to members	LPRT	25 points		
Compile list of speakers and publish to membership	Programs	10 points		
Present NAHU "Education Resources" at Leadership or Strategic Planning	Programs	50 points		
Conduct overview of the NAHU web site at chapter mtg	Programs	50 points		
Show "Single Payer Myths" by chapter or members	Programs	1 - 10 times - 25 points 11 - 20 times - 50 points 21+ times - 75 points		
Receiving RHU, REBC, DIA, LTCP, CSA, CLTC	Education	25 points - max 3		
LPRT Qualifiers - 2007	LPRT	10 points each - max 10		
2005 Triple Crown Award Winners	All	10 points each - max 10		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Pnts Earned</b>	<b>Notes</b>
<b>Media Relations</b>				
Media Relations Chair	President	35 points		
List of local media contacts	Media Relations	10 points - max 10		
Letters to Editor	Media Relations	10 points each - max 20		
Op-ed articles	Media Relations	10 points each - max 10		
Press releases	Media Relations	10 points each - max 6		
Press hits	Media Relations	10 points each - max 10		
Present NAHU's "Working with the Media" at Leadership Training	Media Relations	50 points		
Assist local chapters with "Health Industry Week"	Media Relations	50 points		
<b>Bonus</b>				
Bonus points for awards submission	Awards	50 points		

*Strategic Planning Spreadsheet-Landmark (in responsibility order)*

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Registered Delegates to NAHU Convention - 2007	All	25 Each delegate (max 3)		
Each additional attendee to Convention -2007	All	5 each attendee (max 10)		
Each additional attendee to Cap Conference - 2008	All	5 each attendee (max 10)		
Annual Regional Mtg Attendance (RLC) - 2008	All	20 per attendee (max 6)		
2005 Triple Crown Award Winners	All	10 points each (max 10)		
Perpetual State Chapter Award program honoring members and/or chapter achievement	Awards	100 points		
Silver Seal Certification	Awards	100 points		
Bonus points for awards submission	Awards	50 points		
Chartering Chapters	Chapter Development	1 - 100 points 2 - 150 points 3 - 200 points		
Published an Annual Summary Report of chapter activities to members demonstrating value of membership	Communications	50 points		
State Newsletter	Communications	10 points each - max 12		
Email or fax distribution to membership	Communications	Fax - 25 points Email - 50 points		
Conducted Member Needs Survey, separate from evaluation sheets distributed at events	Communications	50 points		
Host state education/professional development	Education	100 points		
Receiving RHU, REBC, DIA, LTCP, CSA, CLTC	Education	25 points (max 3)		
State Convention	Events	100 points		
100% Board Recruitment Award	Executive Cmte	100 points		
Legislative Chair Attending Cap Conference 2008	Legislative	75 points		
Regular legislative communications sent to members	Legislative	50 points		
Active Legislative Committee	Legislative	150 points		
AHU State Lobbyist (full or part time)	Legislative	125 points		
Membership support to HUPAC	Legislative	5% - 10 points 6-10% - 20 points 11-20% - 30 points 21% or more - 50 points		
Hold meeting with State DOI and/or other regulatory bodies	Legislative	25 points each (max 2)		
Holding a state legislative conference or "Day with Legislators"	Legislative	75 points		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
State-based Operation Shout	Legislative	1 state-based campaign - 15 pts 2 state-based campaigns - 30 pts 3 or more - 50 pts		
Hold/attend meetings with industry colleagues or health insurance coalition partners	Legislative	25 points		
Actively promote LPRT to members	LPRT	25 points		
LPRT Qualifiers - 2007	LPRT	10 points each (max 10)		
List of local media contacts	Media Relations	10 points (max 10)		
Letters to Editor	Media Relations	10 points each (max 20)		
Op-ed articles	Media Relations	10 points each (max 10)		
Press releases	Media Relations	10 points each (max 6)		
Press hits	Media Relations	10 points each (max 10)		
Present NAHU "Working with the Media" at Leadership Training	Media Relations	50 points		
Assist local chapters with "Health Industry Week"	Media Relations	50 points		
Membership and Retention Chair attending RLC - 2008	Membership	25 points		
Membership and Retention Chair attending Convention in Denver - 2007	Membership	25 points		
Develop New Agent outreach program involving local chapters to mentor and recruit new agents into industry	Membership	100 points		
Net State Membership Gain	Membership	31% or more - 250 points 26 - 30% - 200 points 21 - 25% - 150 points 11 - 20% - 100 points 6 - 10% - 50 points 1 - 5% - 10 points		
Active Membership Campaign	Membership	1-day blitz - 25 points Ongoing campaign - 25 points Recruitment materials, flyers, brochures, gifts - 25 points Retention drive - 25 points		
Membership Chair on monthly regional membership teleconferences	Membership	10 points each - max 12		
Retention Chair on monthly regional membership teleconferences	Membership	10 points each - max 12		
Contact with local chapters about follow-up retention activities each month with report to BOD	Membership	10 points each - max 12		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Membership participation in STATE PAC	PAC	10-20% - 10 points 21-40% - 20 points 41-60% - 30 points 61-80% - 40 points 81% or more - 50 points		
President-Elect attending NAHU Leadership Program at Capitol Conference - 2008	President	150 points		
Development/Publication of State By-Laws	President	25 points		
Development/publication of State Policies and Procedures	President	25 points		
Development/Publication of Strategic Plan to members	President	50 points		
IRS approved Tax-exempt status	President	25 points		
Incorporation papers	President	25 points		
Liability Insurance for state officers	President	25 points		
Purchase of liability insurance for state events	President	25 points		
State Leadership Conference	President	150 points		
State Strategic Planning Session	President	Annually - 50 points Two or more a year - 100 points		
Board Meetings	President	10 points each - max 12		
Media Relations Chair	President	35 points		
Compile list of speakers and publish to membership	Programs	10 points		
Present NAHU's "Education Resources" at a leadership or strategic planning session	Programs	50 points		
Conduct an overview of NAHU's web site at chapter meeting	Programs	50 points		
Show "Single Payer Myths" by chapter or members	Programs	1 - 10 times - 25 points 11 - 20 times - 50 points 21+ times - 75 points		
Maintain State Website	Technology	125 points		
Publication annually of approved state budget	Treasurer	25 points		
Publication annually of approved state profit/loss financial statement	Treasurer	25 points		

*Strategic Planning Spreadsheet-Pacesetter*

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Credentialed delegates to Annual Convention - 2007	All	25 pts delegate - max 3		
Each additional attendee to Convention - 2007	All	5 pts attendee - max 10		
Each additional attendee to Cap Conference 2008	All	5 pts attendee - max 10		
Annual Regional Meeting Attendance 2007	All	20 per attendee - max 6		
2007 Triple Crown Winners	All	10 points each - max 10		
2007 LPRT Qualifiers	All	10 points each - max 12		
Award program that honors member achievements	Awards	100 points		
Silver Seal Certification	Awards	100 points		
Bonus points for awards book organization	Awards	50 points		
Board members attending a state sponsored strategic planning session	Board	50 points		
Annual summary report of chapter activities and accomplishments published to members	Communications	50 points		
Distribution of Local Newsletter	Communications	1 page - 5 pts each - max 12 2 or more pages - 10 pts each - max 12		
Maintain a chapter website	Communications	75 points		
Active email and/or Fax Distribution to members	Communications	50 points		
RHU, REBC, DIA, LTCP, CSA, CLTC Designations	Education	10 each - max 10		
100% Board Recruitment Award	Executive Cmte	100 points		
Membership Support of HUPAC	HUPAC	5% - 10 points 6-10% - 20 points 11-20% - 30 points 21% or more - 50 points		
Membership Support of State PAC	HUPAC	10-20% - 10 points 21-40% - 20 points 41-60% - 30 points 61-80% - 40 points 81% or more - 50 points		
Legislative Chair Attending Cap Conference 2008	Legislative	75 points		
Legislative Content Meeting to membership (other than regularly scheduled monthly)	Legislative	50 points		
Actively promoted LPRT to members	LPRT	25 points		
Host "Health Insurance Awareness Week"	Media Relations	50 points		
Appoint a Media Relations Chair	Media Relations	25 points		
List of local media contacts	Media Relations	10 points each - max 10		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Media Outreach - letters to editor	Media Relations	10 points each - max 10		
Media Outreach - op-ed articles	Media Relations	10 points each - max 5		
Media Outreach - press releases	Media Relations	10 points each - max 6		
Press Hits	Media Relations	10 points each - max 100		
NAHU's Working with the Media at Leadership Training	Media Relations	40 points		
Hold New Member Orientations	Membership	10 points each - max 6		
Participated in State New Agent Outreach program	Membership	100 points		
Conducted a Member Needs Survey	Membership	50 points		
Sponsoring chapter membership contest	Membership	75 points each - max 2		
Net membership gain during 4/1/07 - 3/31/08	Membership	21% or more - 200 points 16-20% - 150 points 11-15% - 100 points 6-10% - 50 points 1-5% - 10 points		
Percentage of Membership in bank draft	Membership	10-20% - 10 points 21 - 40% - 20 points 41-60% - 30 points 61 - 80% - 40 points 81% or more - 50 points		
Contacted billed not paid list and reported to state membership (monthly)	Membership	10 points each - max 12		
Contacted lapsed list and reported to state membership (monthly)	Membership	10 points each - max 12		
Establish/maintain program for new members	Membership	50 points		
New Officer Leadership Training workshop	President	75 points		
<u>Active Committees:</u> Awards, Communications, Education/Programs, HUPAC, Legislation, Membership, Media Relations, Public Service	President	5 points each		
D&O Liability insurance for officers	President	25 points		
Regularly scheduled Board meetings	President	10 pts each - max 12		
Hold Strategic Planning open to membership	President	25 points		
President-Elect Attending NAHU Leadership program at 2008 Cap Conference	President-Elect	150 points		
Hosting a local Sales Symposium or CE Seminar	Programs	100 points		
Local Membership Meetings	Programs	10 points each - max 12		
CE Hours Offered	Programs	5 points each hr - max 35		

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Conduct an overview of NAHU web site at meeting	Programs	50 points		
Awards Recognition Service	Programs	75 points		
Sponsoring public service projects	Public Service	20 points each - max 4		
Total dollars donated to public service	Public Service	<u>&lt;126 members</u> \$5000+ - 200 points \$1000-4999 - 100 points \$500-999 - 50 points <\$500 - 15 points  <u>126 or more members</u> \$10,000+ - 200 points \$5000-9999 - 100 points \$1000-4999 - 50 points <\$1000 - 15 points		
Annual publication of budget & financial statements	Treasurer	25 points		

*Strategic Planning Spreadsheet-Legislative Excellence*

<b>Category</b>	<b>Responsibility</b>	<b>Points Possible</b>	<b>Points Earned</b>	<b>Notes</b>
Registered Attendees at 2008 Capitol Conference	All	25 pts ea. - max 5		
Interaction with State Insurance Commissioner's office	All	25 points		
Interaction with State Legislators on healthcare issues	All	25 points		
Members support of HUPAC	All	5% or more - 10 pts 6-10% - 20 pts 11-20% - 30 pts 21%+ - 40 pts		
Attendance at Congressional In-District Town Hall Meetings	All	10 points		
Bonus points for awards presentation	Awards	50 points		
Quarterly legislative newsletter sent to all chapters	Communications	50 points		
<u>State</u> - Day on the Hill <u>Local</u> - Legislative Day Event	Legislative	200 points		
Host a chapter meeting or function that focuses on legislative/regulatory issues independent of Day on the Hill	Legislative	50 points		
Participation by Leg Chair in NAHU's events	Legislative	1 webcast teleconf. - 25 pts 2 teleconferences - 50 pts 3 teleconferences - 75 pts Advanced training - 25 pts		
Maintaining an active legislative committee	Legislative	50 points		
<u>State</u> : Reporting of Leg Cmte activity to Regional Leg Chair and National staff <u>Local</u> : Participation on State Leg Cmte	Legislative	50 points		
Hold/attend meetings with industry colleagues or health insurance coalition partners	Legislative	25 points		
Involvement in the formation and/or support of State Lobbyist program	Legislative	50		
Develop grass roots network to match active members with state legislators	Legislative	50 points		
Full or part-time lobbyist program (state only)	Legislative	50 points		
Formation and/or support of State PAC (state only)	Legislative	25 points		
Other special legislative activity such as work on political campaigns or serving on committees	Legislative	10 points each - max 5		
HUPAC Chair serves on Board of Directors	Legislative	50 points		
Develop local media exposure on legislative issues by press releases to newspapers, letters to editor, articles, etc.	Media Relations	10 points each - max 5		
Holding press conference with local media	Media Relations	25 points		
Radio/TV appearances on health care issues	Media Relations	25 points		

*Strategic Planning Spreadsheet-Presidential Citation*

<b>Category</b>	<b>Responsibility</b>	<b>Notes</b>
10% of Chapter membership qualified for Triple Crown	All	
Publish an annual summary report of chapter activities and accomplishments	Communications	
100% Board recruitment award	Executive Cmte	
Make 20+ presentations on NAHU's health care legislative position in chapter or community	Legislative	
Sponsor "Day with Congressional Leaders"	Legislative	
Hold a meeting with state domiciled insurance companies to explore areas of mutual concern and support or participate in same of another chapter sponsors	Legislative	
Met with area state legislators at least once or had one speak to a chapter meeting with dialogue	Legislative	
Visit with State Insurance regulators to explore opportunities of service	Legislative	
At least 4 times, ask members to send postcards, emails or letters to state and/or national legislators on health care issues and ask that their clients do the same	Legislative	
20% of membership contributed a minimum of \$50 to HUPAC	Legislative	
Initiate a campaign to encourage members to apply for LPRT	LPRT	
Institute a Media Campaign to have articles/letter to editor published by newspaper/periodicals, to make appearances on television broadcasts and/or radio talk shows to discuss health care issues	Media Relations	
Form a Media Relations Committee and/or have this committee general 20+ Press Releases on the issues for local newspaper	Media Relations	
Increased chapter membership by 20% net 04/01-03/31	Membership	
Submit 2 ideas used by your chapter to recruit and retain members	Membership	
Conduct a social mixer for your association members and invite new member prospects	President	
At least 3 times, ask members at chapter meetings to send letters, emails or postcards to their carriers requesting CEOs to financially and otherwise support NAHU	President	
Qualify for Silver Seal Certification	President	
Established and promoted a Speakers Bureau	Programs	
Sponsor a continuing education program or fundraiser for members and non-members using NAHU materials	Programs	
Sponsor and support a chapter sanctioned Public Service project	Public Service	
<b>Note: Must complete 10 of the above: 12 are recommended to assure that 10 are allowed</b>		