

National Association of
Benefits and Insurance
Professionals – Texas Chapter

AWARDS
GUIDEBOOK



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Section 1: General Information about NABIP-TX'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.

STRATEGIC PLANNING: Chapter leaders can use the NABIP-TX and NABIP 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.

LOCAL AWARDS CHAIR RESPONSIBILITIES & JOB DESCRIPTION:

- Apply for every award applicable to your chapter
- Coordinate collection and documentation of all chapter activities
- Organize and lead Awards Committee
- Provide feedback on awards issues
- Participate in monthly conference calls (if applicable)
- Familiarize yourself with all awards
- Familiarize yourself with the Awards Guidebook
- Attend NABIP-TX Annual Convention and Region VI Conference (HIGHLY Recommended)

What I'm Responsible for:

- All current awards applications
- Awards Guidebook
- NABIP-TX and NABIP website
- Awards submissions sent in for the year

Who I work with:

- Chapter Officers and Committee Chairs
- State and Regional Awards Chair
- NABIP-TX Executive Director
- Individual members

PROMOTING NABIP-TX & NABIP 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. NABIP-TX and NABIP depend on the Awards Chairs 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 NABIP-TX Awards Chair will set awards deadline submission date. Submission due date will be set to allow ample time for judging and purchasing of awards before annual NABIP-TX convention. Applications must be received no later than the close of business on the due date regardless of method of delivery. 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 Board members in the awards process. Make sure that the membership chair is providing you with information regarding 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 could 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. The electronic submission form will tabulate points earned. Contact outside sources for any information required to complete the award criteria form. Include any supporting documentation needed for each section and upload to the Dropbox folder. Make sure you highlight the area in the documentation that specifically addresses the criteria in that section.

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, as required.

Three to Five days prior to deadline

Prepare the award submission to be uploaded to Dropbox. Keep a copy of everything for your records. Be sure to upload to the Dropbox by the required date.

HOW TO BEGIN?

At the beginning of your year as Awards Chair:

- Download and review all NABIP-TX and NABIP Awards applications (that apply to your chapter) to familiarize yourself with the criteria of each award. You can find the Awards criteria on the NABIP-TX website at <http://www.nabip-tx.org> and click on the “About Us” tab, then “NABIP-TX Awards Guidebook & Applications.” For NABIP Awards go to the NABIP website - <https://nabip.org/chapter-resources/awards>.
- Prepare your blank spreadsheets now. Save a copy of the template so you can start from your own version.
- 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 electronic copies of all meeting agendas, minutes, notices, flyers, registration forms, state approved continuing education certificates, newsletters, media releases, etc.
- Review the local awards chair position description.
- Contact your state awards chair to get acquainted and ask any questions.

As Awards chair, it is important that you are organized, detailed, active and involved in your Association activities during the year. This 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 the NABIP-TX and/or NABIP’s CHAPTERS OF THE YEAR!

Section 2: Awards Toolbox

AWARDS AT A GLANCE MATRIX: This tool is a concise description of the NABIP and NABIP-TX awards available to chapters and individual members.

NAHU Awards at a Glance

Award	Area of Achievement	Awarded to	# Given
Individual Awards			
Harold R Gordon Memorial Award	Health Insurance "Person of the Year"	Individual Member	1
Distinguished Service Award	Volunteer service	Individual Member	top 50% submitted
Vanguard Leader Award	Leadership Service	Individual Member	top 50% submitted
Presidential Citation Award	Excellence in leadership	Chapter President	unlimited
Public Speaking, William Wetzel Award	Public Speaking	Individual Member	1
Chapter Award			
Pacesetter Award	Service to members & the industry	Local Chapter	top 50% submitted
Landmark Award	Service to members & the industry	State Chapter	top 50% submitted
Media Relations Award	Outstanding Media relations	Local & State Chapter	2 local/2 state
Website Award	Effective, easily navigated website	Local & State Chapter	top 50% submitted
Prof'l Development, Robert Osler Award	Professional development activities	Local & State Chapter	1 local/1 state
Public Service, William Flood Award	Public Service activities	Local & State Chapter	1 local/1 state
Community Service, Ouida Peterson Award	Community Service activities	Local	top 50% submitted
Regional Award			
Blue Chip Award	Regional Activity	Reg'l Vice President	8
Region of Excellence Award	Overall Regional Activity	Reg'l Vice President	1 large/1 small
Individual & Chapter Awards Application deadline is April 5 NAHU Awards Period is April 1 - March 31 (unless otherwise stated on the application)			
Membership			
Recruiter of the Year	Most members recruited	Individual	1
Most new members	Most new members	Local & State Chapter	4 local/4 state
Highest Growth Rate	Highest growth rate	Local & State Chapter	4 local/4 state
Highest Retention	Highest retention rate	Local & State Chapter	4 local/4 state
Regional - Membership Awards			
NAHU Region of Membership Excellence	Best Overall Membership	Reg'l Vice President	1
Most New Members	Best Overall New Members	Reg'l Vice President	1
Highest Growth Rate	Best Overall Growth Rate	Reg'l Vice President	1
Highest Retention	Best Overall Retention	Reg'l Vice President	1
NO application needed for any membership awards - awarded by the Membership Council Membership Awards and Contest ends on April 30 Membership Awards Period is May 1 - April 30			
Legislative Awards			
"Spirit of Freedom" Award	Overall Legislative Impact	Individual Member	1
Legislative Achievement Award	Legislative Activity	Individual Member	5
Legislative Excellence Award	Legislative Activities	Local and State Chapter	top 50% submitted
These awards are judged by the Legislative Councils and will be presented during NAHU's Capitol Conference Legislative Award Application deadline is the second Monday in January. Legislative Awards Period is January 1 - December 31			

* This award is submitted by an individual NAHU member directly to the H.R. Gordon committee.

COMMONLY ASKED QUESTIONS & ANSWERS

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

The Awards Committee will consist of the Awards Chair, NABIP-TX Current President, the EC member with awards responsibility, Immediate Past President and first-year Board Trustee. In the event that any of these Board members are not available to judge awards, the President will appoint a substitute with approval of the Board. Each award submission is reviewed by at least two persons. Each team completes the entire review process separately from each other. No one is allowed to judge a submission from his or her local chapter, 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. If more than one viewpoint is expressed, a vote is taken. Each member signs off on the application. The Awards Committee tries to give as many points as possible.

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 Guidebook will answer most questions regarding documentation needed. 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 is received but do 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, NABIP-TX or NABIP name must be mentioned in published articles to count.

- Double dipping – counting 1 meeting in more than 1 section

An example would be counting a legislative meeting and then taking points again for the same meeting under a special membership meeting. We would allow the highest points in one category, not both.

- Confusing Leadership Training with Strategic Planning

Leadership training is when you train your new Board members on their duties; explain what NABIP-TX & NABIP stand for, etc. A Strategic Planning meeting is when the Chapter sets its 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 NABIP-TX Award Guidebook for further clarification.

- Documentation is outside of the required timeframe or not dated at all
All criteria must occur during the time period 1/1 through 12/31.
- Information submitted does not match NABIP-TX or NABIP's official records
The NABIP-TX and NABIP website has criteria lists that will help in this area.
- 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 than those for which you are providing documentation
For example, documentation is provided for eight membership meetings but points were taken for 12 meetings. 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 if 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.

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:

You are functioning as your local awards chairperson, you may find the following tasks helpful in communicating with your chapter leaders or other awards chairs. Remember that the State awards are for the calendar year January – December and that the National Awards are from April – March. This is only meant as a guide – be sure and adjust as needed to meet the awards deadlines.

- | | |
|----------|---|
| January | <ul style="list-style-type: none"> ▪ Remind contributors of documentation that the receipt deadline for the NABIP-TX award is due next month ▪ Offer your assistance to answer questions or help in any way you can |
| February | <ul style="list-style-type: none"> ▪ Submissions are due this month to NABIP-TX Awards Chair for NABIP-TX awards |
| March | <ul style="list-style-type: none"> ▪ Remind contributors of documentation that the receipt deadline for the NABIP award is due next Month |

- Offer your assistance to answer questions or help in any way you can
 - Last-minute effort to pick up extra points needed for NABIP award
- April
- NABIP Awards submissions are due
 - Attend State Convention for award points
- May
- Encourage Awards Chairs and individual members to attend National Convention to receive awards in person
 - Plan to attend awards breakout session to learn about changes, leadership guide revisions & tools
 - Submit press release to Media with State Award winners!
- June / July
- Introduce yourself to your Board as their contact person and offer to help
 - Congratulate the winners in your chapter
 - Encourage the use of NABIP-TX & NABIP awards in Strategic Planning and assignment of specific tasks by Committee Chair and/or Board Member
 - Offer to assist Chapter President with Strategic Planning session
 - Encourage everyone to attend Regional Meeting so they have the latest and greatest information available.
 - Submit press release to Media with National award winners
- August
- Outline/review changes in program for those who could not attend Regional Meeting
 - Set up files or folders to keep the documentation sorted and organized
- September
- 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?
 - Give status report to Chapter Board -- identify areas of weakness and solicit assistance
 - Encourage assistance in filling the blanks in planned submissions over next 4 months
- October
- Give status report to Chapter Board -- identify areas of weakness again and solicit assistance
 - Encourage assistance in filling the blanks in planned submissions over next 3 months
- December
- The holidays are the perfect time to make a Public Service donation for awards points
 - Last minute effort to pick up extra points where needed for NABIP-TX awards
-

Section 3. Award Overview

NABIP-TX CHAPTER and INDIVIDUAL AWARDS

All NABIP-TX awards criteria are found on the NABIP-TX website at <http://www.nabip-tx.org>. For NABIP-TX awards, go to <http://www.nabip-tx.org>.

NABIP-TX CHAPTER AWARDS

Chapter of the Year

Honors local chapters for outstanding achievements and excellence in serving their members, the community and our industry.

A total of three (3) Chapters of the Year Awards may be presented to the highest scoring chapters as follows:

- One (1) local Small Chapter with membership of less than 50
- One (1) local Medium Chapter with membership of 51 – 175
- One (1) local Large Chapter with membership of 175+

(Membership classification will be based on the December 31 membership count report)

A Presidential Citation award will be presented to the runner up in each category.

Chapter Media

The Media award honors a local association for outstanding media outreach efforts, achieving broadcast and press coverage and maintaining relationships with various media contacts.

A Presidential Citation award will be presented to the runner up in this category.

Chapter Membership Growth Award – Highest Percentage Gain

Presented to a local Small Chapter (1-99 members) and a local Large Chapter (100+ members) that has the highest percentage gain from the period of 01/01 through 12/31.

Chapter Membership Retention Award – Highest Percentage Retention

Presented to a local Small Chapter (1-99 members) and a local Large Chapter (100+ members) that has the highest percentage retention from the period of 01/01 through 12/31.

Chapter Professional Development

Presented to a local chapter that demonstrates exceptional leadership by providing outstanding education/professional development programs on health insurance and related topics to members, associates and the general public.

Multiple Presidential Citations will be awarded honoring chapters and their chairpersons that have successfully accomplished 10 out of the 19 award criteria.

Chapter Public Service

Presented to a local chapter for excellence in public service events and activities. A Presidential Citation award will be presented to the runner up in this category.

Chapter Website

The individual website award is presented to an individual for an outstanding website that serves as a resource for members, non-members and the public, and promote the value of membership.

A Presidential Citation award will be presented to the runner up in this category.

NABIP-TX INDIVIDUAL AWARDS

Ken Martin Excellence in Communication

The Ken Martin Award for Excellence in Journalism or Public Speaking honors a member of NABIP-TX who has demonstrated excellence in either journalism or public speaking.

Legislative Achievement

This award honors a person that excels in their legislative involvement by performing outstanding service throughout the year.

A Presidential Citation award will be presented to the runner up in this category.

Newsletter

The newsletter award honors an individual member for an outstanding newsletter publication.

A Presidential Citation award will be presented to the runner up in this category.

Special Service

This award recognizes a member who has excelled in areas of service on the local level that includes areas of service not awarded under a specific category, such as a Treasurer, Secretary or other Board member.

Tom Schilling Outstanding Texan of the Year

The nominee for this award should be an individual member who has contributed outstanding service to the NABIP-TX. Consideration will be given to the nominees who have served the State Chapter consistently over the years.

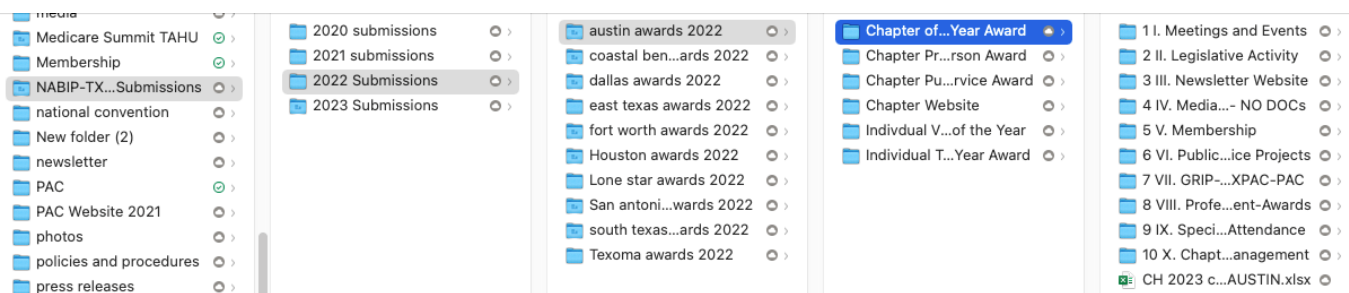
Volunteer of the Year

The nominee for this award should be an individual member who volunteers numerous hours to the association through dedicated service at the state, regional or national level.

Section 4. The Application Process

RULES AND SUBMISSION GUIDELINES

1. Each award submission must be submitted independently. You must fill out your worksheet and provide supporting documentation matching folders for each area of the award. These will be contained in a Dropbox folder for your chapter.
2. Do not send CDs or flash drives for the Awards Committee to review. The Awards Committee will ONLY review electronic submissions through Dropbox.
3. NABIP-TX does not require any supporting documentation for the Website Award. Simply let the Committee know if any passwords are needed to access “members only” areas.
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. These must be scanned and submitted as PDF's through Dropbox.
5. Your submission must include the electronic NABIP-TX original application form/score sheet with completed point scoring, where applicable. Re-keyed 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. Please arrange documentation by criteria number. Each submitted PDF should be named with the criteria number to which it applies so that the sheets will be in the folder in numerical order.



8. Documentation should be specific to the criteria.
9. If pictures are included in your submission, include an explanation and individual names and titles of those in the picture in a caption below the picture. Photos MUST BE PUBLISHED to receive award credit.
10. Make sure to include adequate explanations, where appropriate. Keep in mind the Awards Committee may not know the individual members or important regulatory and legislative

persons in your local area.

11. No points are awarded in a category that does not have adequate supporting documentation.
12. In most cases, award nominations may be submitted by an individual member.
13. When no applications are received for a particular award or award category, the award will not be given in that year.
14. 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.
15. The deadline for receipt of the application is documented on the application. Be sure to submit your application by 11:59pm on the last day of the awards submission deadline. The Awards Committee will not consider applications received after the deadline date.
18. NABIP-TX-provided “criteria lists” are available through the NABIP-TX Executive Director and used as documentation for award applications. To request a “criteria list”, email the NABIP-TX Executive Director at admin@nabip-tx.org. The majority of these lists are available usually by January 15th and include:
 - Day at the Capitol Attendees
 - Convention Attendees
 - Training Workshop Attendees
 - Strategic Planning Meeting Minutes
 - NABIP-TX Honorees Corporation Contributors
 - Chapter Leg Fund Contributors
 - Individual GRIP (NABIP-TXPAC) Contributors
 - Key Contacts
 - Membership Reports

Questions regarding these lists may be directed the NABIP-TX Awards Chair or the NABIP-TX Executive Director.

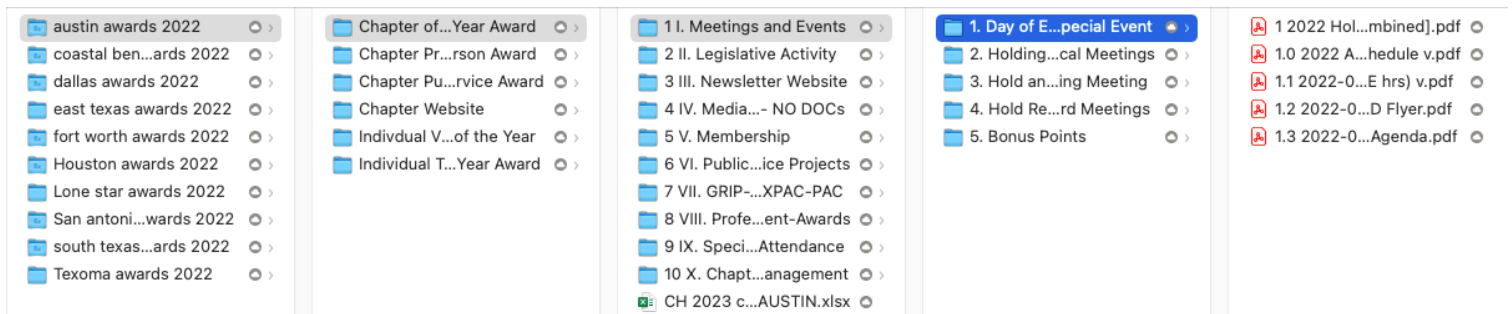
NABIP criteria listings are located on their website at www.nabip.org.

GATHERING AND ORGANIZING INFORMATION

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

1. Download the spreadsheets from the NABIP-TX website.
2. 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 NABIP-TX and NABIP, but you must still include the documentation.

3. Set up the folders within Dropbox for your submissions.
4. Do not place one item in a section and refer to the documentation in another section. If one document is used to meet more than one criteria, duplicate it. It needs to be in the folder for both criteria.
5. Each page of documentation should be numbered to correspond with the section to which it refers (e.g., Section I, Number 5. Submission should be organized so that documentation for each point is provided in the appropriate section. If the documentation is not located in the appropriate folder or is too difficult to find, the points may not be given. For items that have a maximum number of points set, the points are listed.



THE KEY THING TO REMEMBER IS TO MAKE YOUR SUBMISSION EASY FOR THE AWARDS COMMITTEE TO REVIEW AND DETERMINE THAT YOU HAVE PROVIDED BACKUP DOCUMENTATION FOR ALL POINTS TAKEN.

Section 5. Chapter Award Criteria and Documentation

Chapter of the Year

I. Meetings & Events

Item #1. The Sales Symposium or Professional Development Day must be a special event – whether in person or virtual - offering multiple CE hours (minimum 5 CE credits), with multiple speakers, and should not coincide with a regularly-scheduled membership meeting. Suggested forms of documentation are announcement flyers, Board minutes, articles, agendas, or promotional information in chapter newsletter including time, date and place of sales symposium or Professional Development Day. You must “prove” the event took place and not just include the announcement/promotion of the event (as events are sometimes cancelled due to weather, lack of attendance, etc.). You must provide a copy of one (1) sign in sheet OR CE Certificate for EACH CE in order to verify that multiple CE’s were offered. Do not submit a copy of the CE Certification for EACH attendee.

Item #2 – To qualify for monthly meetings points, the chapter must show documentation of all meetings – whether in person or virtual. Special meetings do not qualify as one of the 12 meetings. Events and activities are only counted once. Documentation for these meetings may be provided by newsletter article, Board minutes or website post. You must submit documentation that the event “actually” happened, not just documentation announcing it (e.g., announcement in newsletter of upcoming meeting and then in the following newsletter, photos and an article by the President reviewing the meeting. Both must be submitted to receive credit for the meeting. IMPORTANT: Just because you said it was going to happen does not count – you have to “prove it”. As an example, you had a monthly meeting scheduled on April 10th. You printed in the May Newsletter that a tornado hit your town in early April and destroyed the meeting facility, and the meeting was cancelled. This is why we ask you to “prove” it to us. Again, if you had a meeting scheduled for April 10th and you announced it in the March Newsletter and then showed a summary of the meeting in either the April or May Newsletter – that is valid proof that the meeting took place.

Item #3 - Documented local meeting must be Strategic Planning and NOT Leadership Planning. 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. Strategic Planning minutes are the most creditable information you can submit.

Item #4 – Provide copies of dated Board minutes. You must provide minutes of EVERY Board meeting in order to receive credit. If you have 12 Board meetings, but only submit minutes for 4 Board meetings, you will only receive credit for 4 meetings.

Bonus – Meetings may only be counted here as long as they are not counted under another section. Regularly scheduled meetings or special Board meetings cannot be counted here. Documentation for these meetings may be provided by newsletter article, Board minutes, newspaper articles, or website post. Be sure and document that the meeting actually happened and not just by an announcement.

II. Legislative Activity

Item #1 -- A legislative content meeting is a special meeting or program presented to the Association’s membership. Points for this meeting may only be used once. A legislative mixer is not considered to be a legislative content meeting. COBRA updates, etc. are not considered a legislative meeting. You may

include monthly membership meetings (as long as they are legislative programs and not just legislative updates) and special legislative meetings. You may submit an announcement or article published in your local newsletter referencing this special meeting as documentation. You must “prove” the meeting took place and not just provide an announcement (e.g., an announcement in the newsletter then in the following month’s newsletter an article is written about the event with photos. Both must be provided in order to receive points.)

Item#2 – Documentation would be regular attendance of monthly state legislative teleconference calls. Documentation needs to be through Committee minutes showing attendance. Request a list from the Local or State Legislative Chair.

Item #3 – Documentation suggestions: Board reports, letters, emails, visits or phone calls from legislators you met with (e.g., a thank you letter from your meeting with the legislator or a mention of the meeting in the local Board minutes).

Item #4 – Use the list provided by NABIP-TX. Print the list and highlight chapter attendees. This can be found on the NABIP-TX website or by contacting the State Legislative Chair.

Item #5 – Use the list provided by NABIP. Print the list and highlight chapter attendees. This can be found on the NABIP website.

III. Newsletter / Website

Item #1 – Submit original cover and table of contents for each edition. If newsletter is 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 or a copy of the email distribution letter, showing to whom the newsletter is sent and the newsletter itself.

Item #2 – Submit the Chapter’s website address on the application. Provide a printout of the website’s home page. Include any required password. Validity of the website will be verified by the Awards Committee.

Item #3 – Attach a portion of the email distribution list for documentations – MUST show names, not just a grouping (e.g., members@texoma.org is not acceptable without a listing of names for that grouping). You must print out a list of the members’ email addresses that are for distribution. Lists may be requested from Chapter’s email service.

Item #4 – Submit the Chapter’s website address with the newsletter link and print the screen. Highlight the area where you can access the newsletter.

IV. Media Relations

Item #1 – May be documented with Board minutes, reports and other communication pieces, such as press releases, media advisories, op-ed “opinion pieces”, editorials, and letters to the Editor. Copies may be accepted of newspaper articles, etc. as long as they include the name of the publication and the date it was submitted or published. TV or Radio submissions may be documented in the Board minutes or in letters from the participating news outlet with mention of the subject matter. Electronic submissions to online publications will also be accepted and must follow the same guidelines outlined previously. Social media posts may be accepted but must be actual articles/op-eds/letters/event announcements and reviews and must be fully documented.

Item #2 – 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. Show how this information is made available to membership.

Item #3 - Documentation needs to consist of flyers, announcements, newspaper articles, and/ or thank you letters from the organizations. Provide something that “proves” the speaking engagement actually happened.

V. Membership

Item #1 – Must show formal membership contest and promotion methods, with incentives to encourage membership recruitment.

Item #2 – Under this section, the Awards Chair may contact NABIP’s Chapter Relations Manager or find the information posted on NABIP’s website. The information submitted is subject to verification by the NABIP-TX Awards Committee.

VI. Public Service Projects

Item # 1 – Announcements to membership, Board Committee reports and newsletter articles may document the public service projects your chapter has sponsored. Photographs are not considered documentation. Social media posts – with a date verifying project/event and including a clear explanation of project/event and result – may be accepted. Additional documentation may be required to verify the date(s) and actual occurrence of the projects

Item #2 – Total amount donated to one project may be documented in the treasurer’s reports, checks presented and Board minutes, with dates, receipt of items purchased from merchants or a letter from the recipient. Other suggested documentation: copy of chapter’s complete budget with line item details.

Item #3 – A listing of the NABIP-TX Honorees Corporation contributors is available through the NABIP-TX Executive Director.

VII. GRIP (Texas Leg Fund /NABIP-TXPAC / NABIPPAC)

Item #1 – Contact the State NABIP-TXPAC Chair for this documentation or the NABIP-TX Executive Director.

Item # 2 – Contact the State NABIP-TXPAC Chair for this documentation or the NABIP-TX Executive Director.

Item #3 – Documentation is located on the NABIP website – contact the NABIP Chapter Relations Chair for help if you cannot locate or the State PAC Chair.

VIII. Professional Development / Awards

Item #1 – Points will be awarded for the following designations acquired during the January 1 – December 31st timeframe: RHU, REBC, DIA, LTCP, CSA, CLTC, HIA, MHP, CLU, CEBS. To document the chapter recipients of these designations, print a copy of the certificate for each member (be sure the completing/award date is recognizable).

Item #2 – TDI-approved continuing education hours must be documented with an announcement flyer indicating number of hours offered and the TDI approval course number. Please mark documentation

with highlighter, tabs, etc. CE hours must coincide with dates and times on the documentation. CE certificates will be accepted for documentation. (note: CE hours during education day that are counted in another section may not be counted here also). Be sure and include a CE certificate for EVERY CE hour you are claiming for points. Example: if you have a COBRA seminar and there are three classes offered, you must submit the CE certificate for EACH class. Be sure the certificates are separated in the awards book. DO NOT put all certificates together and expect the Committee to pull them out of a protective sleeve. Each certificate should be displayed separately.

Item #3 – Provide the list of the courses offered by your chapter with TDI-approved course number, CE hours, and dates they were presented. You must also provide the CE certificates in this section as proof. Each certificate must be documented separately in the binder. Do not put together in one protective sleeve.

Item #4 – The announcement (invitation) regarding the date of the award recognition. Articles in newsletter or Committee reports may be used to document event actually took place.

IX. SPECIAL EVENT ATTENDANCE

Item #1 – Attendance list is available through the NABIP-TX Executive Director. Print list of attendees and highlight your chapter members. Contact NABIP Chapter Relations to verify total membership as of 12/31. Include this email or document in your submission. Information will be verified by NABIP-TX Awards Committee.

Item #2 – Lists may be requested from the Region VI Awards Chair or from NABIP Chapter Relations. Submit the appropriate list, highlight your chapter's participating members and submit this list as documentation.

Item #3 – Information is located on the NABIP-TX website. Print out appropriate workshop sign-in sheets and highlight your chapter's participating members. Submit this list as documentation.

X. CHAPTER MANAGEMENT

Item #1 – Budget should be presented showing revenue and expenses for the chapter, including sources for the proposed revenues. Be sure budget includes January through December of the awards year.

Item #2 – Include a copy of all current policies and procedures

Item #3 – Include a copy of current bylaws

Item #4 – Include a copy of Articles of Incorporation or Articles of Association. A copy of the incorporation papers or proof of incorporation from the State must be supplied as documentation. Contact the NABIP-TX Executive Director if you are not clear if your Local Chapter has this or if you need to apply for one.

Item #5 – Include a copy of Franchise Tax exempt letter.

Item #6 – Include a copy of the IRS Tax exempt letter.

Item #7 – Include monthly Treasurer's report (12 months of reports) – you MUST have a report for EACH month, so submit 12 SEPARATE reports. If you are not sure what is needed here, ask!

Item # 8 – Include 990T form or a letter from the NABIP-TX executive director stating one is not needed

Chapter Media

Item #1 – Provide a copy of your local Board minutes where Media Chairperson is named.

Item #2 – The list of local media contacts must contain all information requested: including contact name, publication or broadcast station name, phone, fax and email address. If all items are not included the list will not be counted for points.

Item #3 – Provide copies of press releases and list of to whom they were sent. If you are sending a photo, please provide a copy of that photo, and attach it to the press release you submitted. Be sure the photo documents who is in the photo and what event it was promoting etc.

Items #4, 6 & 7– Provide copies of media advisories/letters to the editor/op-ed articles and indicate distribution. You can print out a copy of the media advisory and then a copy of your media contact sheet and highlight the media contacts to whom it was sent.

Item #5 – Copy NABIP’s media relations staff within 30 days on press releases, media advisories and other communications with the media. Example: copy NABIP on an email submission for a press release to a newspaper publication, and then submit the email back from NABIP that they received it.

Press Hits: Information published in news articles or features must mention the local chapter of the National Association of Benefits and Insurance Professionals. 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. Appearances on radio and television programs maybe documented through Board minutes.

THE MEDIA PIECES:

Specific descriptions of the various media pieces, as supplied by NABIP 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 level; or recent news occurring in your local chapter (local monthly meetings, 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 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-eds” 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 “who, 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 “cut-line” to photo that identifies the person(s) in photo and describes what is pictured
- Include with appropriate news announcements (promotion, awards, and 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 may 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 NABIP website.

Chapter Membership Growth

Highest Percentage Gain –

- Net Local Small Chapter (1-99 members) membership gain (for the period of 01/01 through 12/31). Verified by NABIP-TX.
- Net Local Large Chapter (100+ members) membership gain (for the period of 01/01 through 12/31). Verified by NABIP-TX.

Chapter Membership Retention

- Highest Retention Percentage - Net Local Small Chapter (1-99 members) membership retention (for the period of 01/01 through 12/31). Verified by NABIP-TX.
- Net Local Large Chapter (100+ members) membership retention (for the period of 01/01 through 12/31). Verified by NABIP-TX.

Chapter Professional Development

Items# 1, 5, 6, 13 – TDI-approved continuing education hours must be documented with an announcement flyer, Board minutes, articles or promotional information in chapter newsletter, Committee reports, etc. – time date and place courses where conducted must be included in the documentation provided. All pieces must indicate number of hours offered and the TDI-approved certificate number. Please highlight documentation. CE hours must coincide with dates and times on the documentation. CE sign in/out sheets will be accepted as well as CE certificates, BUT a certificate or sign in/out sheet MUST be provided for EACH course.

Item #2 – Demonstrate calculation on award criteria

Item #3 – Provide a copy of the certificate designation by education facility attended with member's name. Be sure it is dated during the awards period.

Item #4 & 9 – Appropriate documentation would include invitation and/or thank you/ acknowledgement letters or emails, program/agenda indicating date, time and place presentation occurred, etc. Provide list of to whom it was distributed.

Item #7 – Provide a list of attendees and highlight the non-members.

Item # 8 – Provide copies of the newsletter and highlight Professional Development article.

Item #10 – Provide a copy of the CE announcement and documentation of public and/or client involvement. May be documented by sign-in sheets, acknowledgement letters, copies of invitations,

media advisories, press hits etc. Documentation must include date, time and place event or program occurred.

Item #11 – Documentation could be a record of the Professional Development 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 the Board.

Item #12 & 17 – Highlight Professional Development Chair’s name on all Annual Convention and Regional meeting attendance lists or conference calls. List may be obtained from NABIP-TX Executive Director or from Regional Awards Chair.

Item #14 – Include a listing of the agent database that was used for marketing to Group 1 agents by your Chapter. Also include a copy of the promotional piece that was mailed to them. Database information will only be accepted if it is dated during the awards period.

Item #15 – Documentation can include treasurer’s reports or Professional Development Committee reports.

Item #16 & 18 – Documentation can include Professional Development Committee reports or Board reports.

Chapter Public Service

Item #1 – 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. Each fundraiser is considered one project.

**** NABIP-TX HONOREE’S CORP MAY NOT BE COUNTED HERE****

Item #2 – Documentation could be a record of the Public Service 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 the Board.

Item #3 – 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.).

Item #4 – 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. YOU CAN ONLY QUALIFY FOR ONE – mark Newsletter, Monthly Meeting Announcement OR Fax/Emails – do not mark more than one.

Item #5 – Include NABIP-TX membership report as of 12/31 with total number of members for your chapter. Documentation from Treasurer's reports, project financial reports, cancelled checks or receipts for items purchased stating total dollars contributed. Helpful hint: list project with total dollars contributed on a separate page for each project, and then put documentation (i.e. Treasurer's report) behind each project. Then provide a separate overview sheet with ALL projects listed, with dollar amount contributed, and then provide the membership listing from NABIP-TX. Calculate the total at the bottom of this page for \$\$ per member.

Bonus: List all projects on a single sheet, with dollars donated to each project. Total the amount at the bottom of the page. NABIP-TX Awards Committee will verify chapter size.

****DO NOT COUNT CONTRIBUTIONS TO HONOREES CORP HERE****

Item #6 – Documentation may be found on the NABIP-TX website. Print out the Honorees Corporation contribution list and highlight members.

Item #7 – a) Documentation could include press releases, press hits, newspaper articles. If a photo is submitted, it must include who is in the photo, beneficiary organization and date. b) Documentation could include copy of newsletter with photos of representative at luncheon c) Documentation could include copies of thank you letters, pictures of event/ceremony, pictures of plaques or awards given or received by the chapter, agendas, Board meeting minutes listing the formal presentation, newspaper articles, etc.

ADDITIONAL NOTES: Public Service project suggestions are golf tournaments, Toys for Tots, food drives, Habitat for Humanity, community volunteer days, charity auctions, etc.

Chapter Website

You must list your chapter's website along with any relevant username/password on the electronic submission form. The Committee reviews the website for the requirements and judges the award online while viewing the local Chapter's live website.

Item#1 - Home Page

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

Items # 2 & 9: Membership

Membership information should be included in a separate link and include member's names and contact information. Membership information should include chapter specific information as well as a link to the NABIP membership benefits section. A membership application should also be provided on the website as well as dues information.

Item #3: Calendar of events

The website should include the chapter's calendar of events.

Item #4: Board Members

The website should include the chapter's Board contact information.

Item #5: Industry News

The website should include a section that provides a link to NABIP-TX and NABIP's website containing information on Industry events.

Items # 6 & 8: Legislative information

The website should include a section that includes a link to NABIP-TX and NABIP's website containing information on Legislative events.

Item #7: Professional Development and Continuing Education information

Continuing Education information should include upcoming events where CE credit is offered.

Item #10: Organization and appearance

Organization is very important to this award. Be sure and divide this award into the appropriate sections.

Section 6. Individual Award Criteria and Documentation

Individual Legislative Award

Item #1: Provide proof from NABIP by contacting NABIP Chapter Relations.

Item #2: Provide copies of Legislative Committee minutes, Board reports/minutes, special reports, sign-in sheets, email communications, etc. Contact the State Legislative Chair for reports and verification.

Items #3 & 12: 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.

Item #4: Provide Key Contact list and evidence of candidate's activity. Go to NABIP-TX website for list available under the Legislation section.

Item #5: Provide copies of sign-in sheets, attendee lists, minutes, emails, CE certificates, etc. Contact the NABIP-TX Executive Director for current and past attendance rosters.

Item #6: Documentation could include letter/emails of appreciation for working on the planning, Board minutes, Committee reports and/or communications etc.

Item #7: Provide copies of communications, such as emails, letters, etc.; Board minutes; Committee reports; etc.

Item #8: Submit copies of communications, such as emails, letters, etc.; Board minutes; Committee reports; etc. Hint: provide copies of Operation Shouts to State Legislators

Item #9: State, regional, national attendance may be found on the respective websites or by contacting

the NABIP-TX executive director or NABIP chapter relations.

Item #10: Go to NABIP website under awards for list. Print out and highlight member.

Item #11: Contact Regional Awards Chair or go to NABIP-TX website under awards for listings.

Item #13: Provide documentation of involvement outside NABIP-TX. Hint: Campaign Chair for local state representative or volunteer for local candidates.

Individual Newsletter Award

Submit original newsletters in their entirety, electronically, each in a separate folder. Be sure the month and year of the publication, along with page numbers, are included in each file title.

Items #2, 3, 4, 5, 6 & 7: Be sure that each of the criteria listed on the award is highlighted. Simply print a copy of the page on which it is displayed and highlight the appropriate section. Be sure that each section is submitted separately.

Ken Martin Award for Excellence in Communication

A nominee should be a deserving member who has made significant contributions in journalism and/or public speaking over a period of years.

Criteria:

1. Published or presented multiple times on the following topics; healthcare, legislation, disability, sales/motivation, dental care, long term care, compliance issues, seminars, work site marketing, and other miscellaneous allied health care or legislative issues.
2. Proof must be provided (with sign-in sheets, evaluations, or CE certificates) that the presentation occurred. If published, a copy of the original article, letter, etc. must be provided.

Special Service Award

This award is presented to a member for OUTSTANDING SERVICE TO THE LOCAL ASSOCIATION.

A hard copy application is NOT required. You may complete and submit the application form and score sheet via email. Please scan all required documentation and submit to NABIP-TX Awards Chair listed on the application.

Item #1, 2 & 3: Contact NABIP chapter relation for verification of membership

Item #4: 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.

Item #5: Submit list of designations obtained. This will be verified by NABIP-TX.

Item #6 & 7: Submit list of years qualified. Contact NABIP chapter relations for information and verification.

Tom Schilling Outstanding Texan of the Year

This award is presented to a member for OUTSTANDING SERVICE TO THE TEXAS ASSOCIATION.

Please scan all required documentation and submit in a Dropbox folder as outlined.

Item #1: Obtain information by asking member or checking the NABIP website.

Item #2: Contact NABIP chapter relation for verification of membership or print out from NABIP – E-Commerce site (membership chair can help with this).

Item #3: Submit list of designations or any special education this member has obtained.

Item #4: Contact NABIP chapter relations for information. Print out and highlight that it came from National.

Item #5: Provide a narrative of the State and/or local accomplishments by this member

Volunteer of the Year

This award is presented to a member for OUTSTANDING SERVICE TO THE STATE, REGIONAL OR NATIONAL ASSOCIATION.

A hard copy application is NOT required. You may complete and submit the application form and score sheet via email. Please scan all required documentation and submit to the NABIP-TX Awards Chair listed on the application.

Item #1: Obtain information by asking member or checking the NABIP website.

Item #2: Contact NABIP chapter relation for verification of membership or print out from NABIP – E-Commerce site (membership chair can help with this).

Item #3: Submit list of designations or any special education this member has obtained.

Item #4: Contact NABIP chapter relations for information. Print out and highlight that it came from National.

Item #5: Provide a narrative of the State and/or local accomplishments by this member

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.

Section 8. Appendix - Awards Committee Contacts and Regional and National Awards Chairs

NABIP-TX SECRETARY – Pete Jaramillo

P. Jaramillo Insurance Benefits Center
315 N. Shary Road, Suite 1005
Mission, TX. 78572
(956) 580-1066 (wk)
Email: petej@petejinsurance.com

REGION 6 AWARDS CHAIR – Cindy Dixon

Benefits and Compliance Specialist
Haymond Insurance
200 S. Main
Searcy, AR 72143
Phone: 501-268-8579
Email : cdixon@haymondins.com

NABIP-TX AWARDS CHAIR – Brietta Williams

Hartman Insurance Services
9500 Ray White Road, Suite 200, Office 265
Fort Worth, TX 76244
Phone: 817-973-5335 wk
Fax: 260-440-3951
Email : brietta@hartmaninsuranceservices.com

NABIP AWARDS CHAIR –

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