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 digital notebook with folders, 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.

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.

AWARDS AT A GLANCE

Individual

Award	Area of Achievement	# Given
Harold R. Gordon Memorial Award	Lifetime Achievement in the Industry	1
Distinguished Service Award	Volunteer Service	Top 50%
Emerging Leader Award	Leadership Service	Top 50%
Presidential Citation Award	Excellence in Service	Unlimited
William Wetzel Award	Public Speaking	1

Chapter

Award	Area of Achievement	Awarded To	# Given
Pacesetter Award	Service to Members & The Industry	Local Chapter	Top 50%
Landmark Award	Service to Members & The Industry	State Chapter	Top 50%
Media Relations Award	Outstanding Media Relations	Local & State	2 local / 2 state
Website Award	Effective, Easily Navigated Website	Local & State	Top 50%
Robert Osler Award	Professional Development Activities	Local & State	Top 50%
William Flood Award	Public Service Activities	Local & State	Top 50%
Ouida Peterson Award	Community Service	Local	Top 50%

Individual & Chapter Awards Application deadline is April 5

Awards Period is April 1 - March 31 (unless otherwise stated)

Membership

Award	Area of Achievement	Awarded To	# Given
Ambassador in Membership	Most Members Recruited	Individual	1
Most New Members	Most New Members Recruited	Local & State	4 local / 4 state
Highest Growth Rate	Highest Growth Rate	Local & State	4 local / 4 state
Highest Retention	Highest Retention Rate	Local & State	4 local /. 4 state

Award	Area of Achievement	Awarded To	# Given
Region of Membership Excellence	Best Overall Membership	RVP	1
Most New Members	Best Overall New Members	RVP	1
Highest Growth Rate	Best Overall Growth Rate	RVP	1
Highest Retention Rate	Best Overall Retention	RVP	1

NO application needed for any membership awards – Awarded by Membership Council

Membership Awards Period is May 1 - April 30

Legislative

Award	Area of Achievement	Awarded To	# Given
"Spirit of Freedom" Award	State & Federal Legislative Work	Individual	1
Legislative Achievement Award	State Legislative Activity	Individual	5
Legislative Excellence Award	Legislative Activities	Local & State	Top 50%

Legislative Award Application deadline is January 15

These awards are judged by the Legislative Council and are presented at NABIP's Capitol Conference

Legislative Awards Period is January 1 - December 31

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	▪ 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	▪ Submissions are due this month to NABIP-TX Awards Chair for NABIP-TX awards
March	▪ 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 ▪ 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 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.

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.

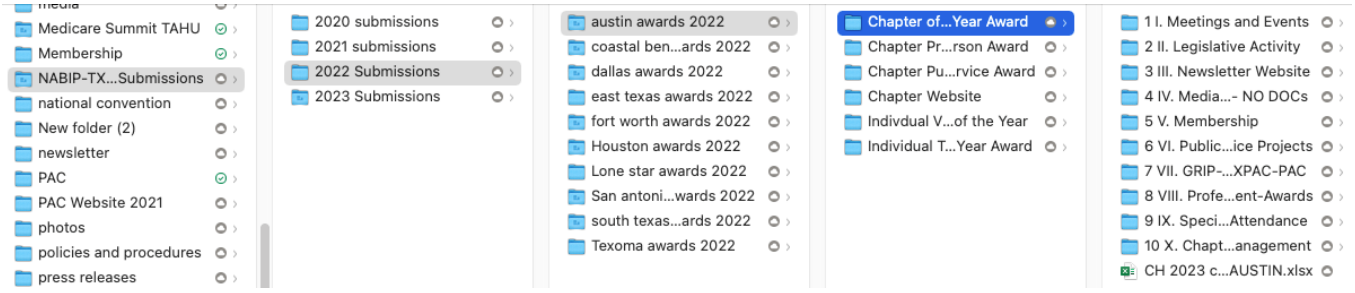
3. NABIP-TX does not require any supporting documentation for the Website Award. Simply let the Committee know if any passwords are needed to access "members only" areas.

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.

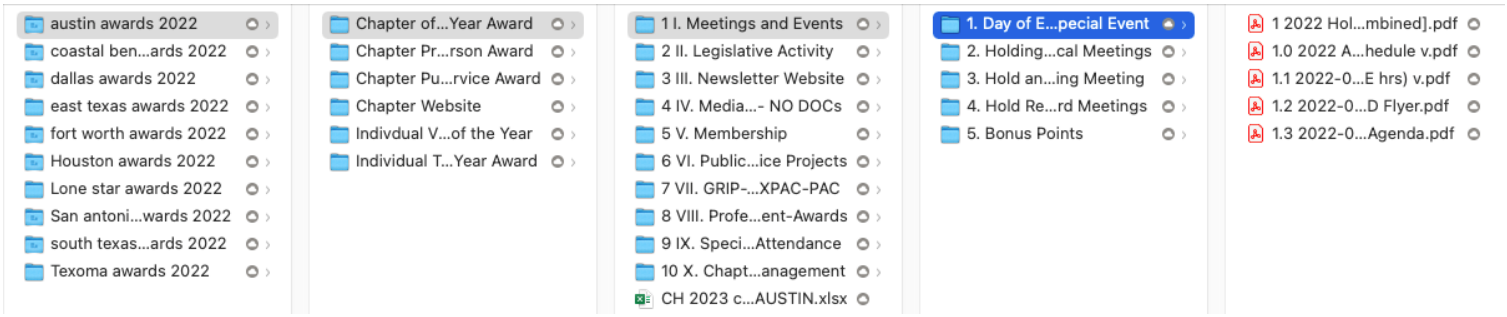
1. Download the spreadsheets from the NABIP-TX website.

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 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.

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: Got o NABI P website under awards f or list. Print out and highlight member.

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

Item #12: Provide documentation of involvement outside NABI P -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 – David Cook
Financial Partners
2501 East Montgomery Place
Wichita Falls, TX 76308
(940-322-6277) WK
Email: david@fp-healthinsurance.com

NABIP-TX AWARDS CHAIR – Brietta Williams
Oliver Insurance Brokerage
Fort Worth, TX 76137
Phone: 817-287-8042 wk
Email: brietta@oliverinsuranace.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

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Ladera Ranch, CA 92694
Phone: 949-463-8383 wk
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