

# National Association of Health Underwriters

## AWARDS CHAIR GUIDEBOOK



America's Benefits Specialists

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## **NAHU State & Local Awards Chair Job Description**

### **Awards 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 members for going above and beyond recommended thresholds and excelling in education, advocacy and professionalism.

### **General Duties:**

- Assist Awards Chairs and Chapter Officers with awards as required
- Encourage chapters and deserving members to apply for awards
- Provide feedback on awards issues as requested
- Participate in monthly conference calls (if applicable)
- Familiarize yourself with all awards
- Familiarize yourself with the awards guidebook
- Help educate new awards chairs (Applies to State Award Chairs)
- Attend annual convention and regional meeting (HIGHLY Recommended)

### **What I Touch:**

- All awards applications we currently have
- 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

## **Suggested timeline for organizing and compiling the 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.

### **At the beginning of your chair's term year:**

Download and print all NAHU awards to familiarize yourself with the criteria of each award. 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.

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. Meet with your chapter president to coordinate awards in strategic planning and/or leadership sessions. Review the state/local awards chair position description on the previous page. Contact your regional awards chair to get acquainted and ask any questions.

### **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 will be used for documentation. Operation Shout letters/emails are also good forms of 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. **Be sure to 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> Street, Ste. 450, Arlington VA 22201.

## **Where can the award criteria be found?**

The awards criteria can be found on the NAHU website ([www.nahu.org](http://www.nahu.org)). Click on **Awards and Competitions** and select the link to **Awards**.

## **Chapter Awards**

### **Landmark Award**

Honors state chapters for outstanding achievements and excellence in serving their members and the industry. The recommended point threshold is 1,000 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**

Honors local chapters for outstanding achievements and excellence in serving their members and the industry. The recommended point threshold is 1,000 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.

### **Chapter Legislative Excellence Award**

Honors state and local chapters that excel in their legislative involvement by performing outstanding service throughout the year. State chapter applications will be based on state chapter activity only. Local chapter application will be based on local chapter activities only.

One award will be given 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.

### **Media Relations Award**

The Media Relations Award honors state and local associations for outstanding media relations. The recommended point threshold is 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 categories. One award to a state chapter with over 250 members and 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.

### **Presidential Citation Award**

Presented to all state and local associations that have strengthened their membership and public outreach programs while meeting at least nine of the seventeen listed criteria. Chapters are encouraged to list as many of the criteria they qualify for instead of limiting it to nine.

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

Presented to a state or local chapter for outstanding achievement in promoting continuing education. The recommended point threshold is 550 points.

### **Web Site Award**

Presented to one state chapter and one local chapter with the most effective and easily used websites.

The recommended point threshold is 350 points.

**William F. Flood Public Service Award**

Presented to a state or local chapter for excellence in public service activities. The recommended threshold is 700 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."

**Distinguished Service Award**

Presented to members who have contributed significantly above and beyond what is normally called for in connection with association volunteer service. A maximum of twelve awards may be given each year. The recommended point threshold is 70 points.

Members can nominate themselves for an individual award. An individual may only receive this awards once every five years. Eligibility is verified by NAHU.

**Legislative Achievement Award**

A maximum of five Legislative Achievement Awards may be presented to members who have made significant contributions and performed outstanding service in state legislative activity.

**Spirit of Freedom Legislative Award**

Presented to a member who has made significant contributions of time and effort in the area of Federal legislation. 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. The qualifications must reflect work done on the Federal level only. It is possible that there will be some years when no award is presented.

Only one award will be given in years that a member meets the criteria, if no member meets the criteria no award will be given. Current NAHU board members are not eligible for this award.

**William G. Wetzel Excellence in Public Speaking Award**

Honors members who have demonstrated excellence in public presentations and met the recommended minimum point threshold of 50 points.

## How to begin?

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

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 NAHU AWARDS COMMITTEE TO REVIEW AND DETERMINE IF YOU HAVE BACK-UP DOCUMENTATION FOR ALL POINTS TAKEN.***

## **DOCUMENTATION SUGGESTIONS FOR CHAPTER LEGISLATIVE EXCELLENCE AWARD**

**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.

**Item #1** -- Local Chapters must provide a special legislative event that is either a separate or expanded format of their regular monthly membership meeting. To document this event provide a copy of the program/agenda showing date of event. If it is an expanded event, you must show why it is considered expanded. (Participation in a state sponsored event does not qualify).

**Item #2** -- Use the list provided by national. Print the list and highlight chapter attendees.

**Item #3** -- Provide a copy of the agenda with a list of attendees; emails, flyers announcing workshop. Meeting must be open to all members, not a Board meeting (Sign-in sheets are always good documentation).

**Item #4** -- To document attendance on legislative web-view teleconference call, request a list from NAHU's legislative department.

**Item #5** -- Workshop is defined as a seminar or discussion group, which emphasizes exchange of ideas and the demonstration and application of techniques, skills, etc. Continuing education does not qualify for this item.

### **II. LEGISLATIVE COMMITTEE ACTIVITY:**

**Item #1** -- Documentation includes board minutes with committee reports, minutes of committee meetings and committee roster with duties of each member.

**Item #2** -- Documentation for state legislative chairs would be regional teleconference minutes documenting that the Legislative Committee (LC) submitted monthly reports and was a regular attendee on monthly regional legislative teleconference calls. Documentation for local legislative chairs needs to demonstrate local legislative committee communication with the state legislative committee through board minutes, emails, etc.

**Item #3** -- Documentation suggestions: Board reports, letters, emails, etc.

**Item #4** -- Documentation suggestions: Board reports, letters, emails, etc.

**Item #5** -- Legislative cmt/board mtg minutes with reports on meetings and/or emails, letters, etc.

### **III. GRASS ROOTS ACTIVITY:**

**Item #1** -- Volunteer list showing key contacts and their assigned state representatives.

Documentation includes examples of grassroots calls to action that utilizes the chapter's key contacts.

**Item #2** -- STATE CHAPTERS 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.

**Item #3** -- Documentation includes board minutes with lobbyist report of activity.

**Item #4** -- STATE CHAPTERS ONLY To document this item provide committee listing, board minutes, details of contributions to selected legislators, board minutes with PAC reports.

**Item #5** -- HUPAC contributors are posted on NAHU web site in the Awards section under criteria lists. Print list and highlight participating chapter members.

## **CHAPTER LEGISLATIVE EXCELLENCE AWARD - continued**

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

**Item #1** – Provide published letters to the editor, press releases, and/or articles mentioning the chapter's members. Make sure to include name of publication and date of publication. Articles must mention AHU.

**Item #2** – Provide a copy of the media advisory announcing the press conference. Photographs are not sufficient documentation.

**Item #3** – Documentation includes letters from station thanking you for the appearance with a mention of the subject matter, board minutes including report of event.

**Item #4** – Provide at least four complete original legislative inserts and the newsletter they were inserted into or a complete special legislative newsletter. should show announcement and document that event occurred

### **BONUS POINTS**

See actual award application for more specific documentation suggestions.

## **DOCUMENTATION SUGGESTIONS FOR LEGISLATIVE ACHIEVEMENT AWARD**

Because this award recognizes outstanding service over an extended period of time, a member who has been awarded a State Legislative Achievement Award within the last five years is ineligible. Even though this award is in many ways subjective, you must still provide documentation other than the required narrative. If confirming communications do not show the position held by the author, please indicate who the individual is and their position or capacity.

**Item #1:** Length of membership can be confirmed by NAHU.

**Item #2:** Copies of committee minutes, board reports/minutes, sign in sheets.

**Item #3:** Show Key Contact list.

**Item #4:** Sign-in sheets, minutes, emails.

**Item #5:** Letters, emails of appreciation for working on the planning; board minutes.

**Item #6:** Emails, letters, board minutes.

**Item #7:** Emails, letters, board minutes.

**Item #8:** Confirmed by letter or email from PAC committee, Chapter President, or a copy of the list of contributors showing dollars given for each year.

**Item #9:** Sign-in sheets, emails, letters, board minutes.

**Item #10:** Confirmed by NAHU.

**Item #11:** Document level of participation with a copy of the newsletter and/or website showing byline; emails, board minutes.

**Item #12:** Emails, letters, printed programs, board minutes.

## **DOCUMENTATION SUGGESTIONS FOR SPIRIT OF FREEDOM AWARD**

This award is based on federal activity at the **federal** level. This activity does not include legislative activity at the state level. All areas should have documentation to substantiate 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.

**Item #1.** 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.)

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

- participated in committees or working groups involving federal legislation;
- 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.

## DOCUMENTATION SUGGESTIONS FOR LANDMARK AWARD

### **I. NAHU EVENTS:**

**Item #1-#4, & #7** – Information is verified by NAHU staff and lists are posted on NAHU’s web site in the Awards Section under “criteria lists”. Print the appropriate list, highlight your chapter’s participating members and submit this list as documentation. Legislative Chair is verified by NAHU’s database. To see who is listed as your chapter’s legislative chair go to NAHU’s web site (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.

**Item #5 & #6** – Regional meeting 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.

**Item #8** – NAHU Leadership Program is held in conjunction with Capitol Conference. Attendance will be verified by NAHU. Co-chairs are eligible for points so long as the information has been registered with NAHU no later than April 5 of the current awards year.

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

**Item #1 & 2** - Publication can be on chapter website or in the newsletter. Print pages off website or include a copy of the newsletter showing where this is published. Include copy of documents. Clarify what publication source is used.

**Item #3** - A copy of the IRS letter of qualification is appropriate documentation.

**Item #4 & #5** - Publication can be on chapter website or in the newsletter. Print web site pages or include a copy of the newsletter where this information is published. Include copy of documentation.

**Item #6** - A copy of the incorporation papers or proof of incorporation from your state must be supplied as documentation.

**Item #7** - A copy of the Directors & Officers (D&O) policy with a current effective date, a dated premium billing, or the state law exempting the need for D&O insurance is proper documentation. Be sure the dates of the policy period are on the documentation.

**Item #8** - A copy of the liability policy or a premium billing for the liability policy can be used as documentation. Be sure to include a page showing the dates of the policy coverage with the documentation and that those dates are during the awards period.

**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.

**Item #1 – #4** - Each meeting/event must be completely separate from the other and can only be counted one time. Double dipping is not point eligible. Documentation should show that the event actually occurred and not just discussion in the minutes that suggest an event should happen.

### **IV. STATE COMMUNICATIONS:**

**Item #1** – Submit original cover and table of contents for each edition, no copies as documentation. If newsletter is not paper, but distributed by email or published on website, a 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.

**Item #2** – Provide website address. Validity of the website will be verified by NAHU.

**Item #3** – 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.

## LANDMARK AWARD - continued

### V. LEGISLATIVE ACTIVITY:

**Item #1** -- 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 and regulatory activity and events.

**Item #2** -- This may be documented through board 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.

**Item #3** -- Documentation on a lobbyist program may be shown through board minutes, lobbyist reports, contracts and news articles.

**Item #4** --A copy of the current membership and financial statements showing each members contribution amount should be used as documentation.

**Item #5** --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.

**Item #6** -- Regulatory bodies are state departments that have an influence on the insurance business. They are not federal congressmen or senators.

**Item #7** -- 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.

**Item #8** -- 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.

**Item #9** -- Document through legislative committee/board meeting minutes with reports on these meetings actually taking place.

Documentation needs to include proof of promotion. A cancelled check does not constitute evidence of a project. Include a description of the project or event; telling the awards committee what was done.

### VI. MEMBERSHIP:

**Items #1 & 2** -- Under this section, the awards chair may contact NAHU’s chapter relations manager or find the information posted on NAHU’s website. The information submitted is subject to verification by the NAHU Awards Committee.

**Item #3** -- To demonstrate that your chapter conducted a formal membership campaign, submit the promotional materials and reports on the outcome. Documentation MUST show the length of time of the campaign.

**Item #4** -- Include agenda or flyer stating that YODA training was offered to the membership.

**Item #5** -- Submit minutes and/or meeting agenda showing that strategic planning was distributed to the membership. 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.

## **LANDMARK AWARD - continued**

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

**Items #1** -- Points will be awarded for the following designation acquired during the January 1 – December 31 award year timeframe; RHU, REBC, DIA, LTCP, CSA, CLTC. To document the chapter recipients of these designations, print the list in the Awards section of NAHU’s website and highlight the chapter’s recipients.

**Item #2** - These may be documented through board reports, minutes, agendas and flyers, etc.

**Item #3** –For points to be awarded for each LPRT qualifier, the awards chair must provide the list of names that is available on NAHU’s website in the Awards Section under “Criteria Lists.”

**Item #4** – Compile a list of speakers that includes the name, topic, bio and contact information.

**Item #5** – The Education Resources PowerPoint presentation can be documented through meeting notice or announcement including time, date and place.

**Item #6** – The list of Triple Crown winners is available on NAHU’s website.

### **VIII. MEDIA RELATION:**

**Items #1** -- NAHU staff will verify that a Media Relations Chair was appointed.

**Item #2** - Include a list with ALL information requested. Must have a complete list including contact name, publication or broadcast station, address, phone, and fax or email address. Incomplete listing will not receive credit.

**Item #3** - Include copies of all letters, articles and press releases. 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.

**Item #4** – Submit meeting notice or announcement including time, date and place.

**Item #5** – 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 NAHU’s website; <http://www.nahu.org/media/tools.cfm>

**BONUS POINTS:** Bonus points will be awarded based on organization, design and appearance. 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. An excellent submission would be highly organized, neat in appearance, creatively designed, with complete documentation in each section, 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.

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 winning **TOP ASSOCIATION OF THE YEAR!**

## DOCUMENTATION SUGGESTIONS FOR PACESETTER AWARD

### **I. NAHU EVENTS:**

**Item #1-#4** – Information is verified by NAHU staff and lists are posted on NAHU’s web site in the Awards Section under “criteria lists”. Print the appropriate list, highlight your chapter’s participating members and submit this list as documentation. Legislative Chair is verified by NAHU’s database. To see who is listed as your chapter’s legislative chair go to NAHU’s web site ([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 April 5 of the current awards year.

**Item #5** -- Regional Meeting must be conducted by RVP with all states in region invited. Must have documentation of attendance at regional meetings. The regional VP should prepare a list of those in attendance and send it to chapter presidents and/or awards chairs. An article in the newsletter or the chapter board minutes listing those in attendance may suffice as documentation.

**Item #6** – NAHU Leadership Program is held in conjunction with Capitol Conference. Attendance will be verified by NAHU.

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

**Item #1** -- Must be a special event that does not coincide with regular membership meetings. Documentation is needed; possible forms of documentation are flyer or announcement of Sales Congress or DITC program.

**Item #2** – To qualify for monthly meetings points the chapter must show documentation of **all** 12 meetings. Special meetings do not qualify as one of the 12 meetings. Events and activities are only counted once. Documentation for these meetings can be provided by newsletter article, board minutes or website post.

**Item #3** -- 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.

**Item #4** – A list of attendees and Board meeting minutes, agenda, website notice, etc. must be provided to support that new member orientation occurred.

**Item #5** - Documentation must include the time, date and place of the Health Industry Week. For tools to assist the chapter with the Health Insurance Week event check the Awards Section NAHU’s website; <http://www.nahu.org/awards/Awards.htm>

### **III. LOCAL COMMUNICATIONS:**

**Item #1** – Submit original cover and table of contents for each edition, no copies as documentation. The date including year must be printed on the newsletter. If the chapter’s distributes an electronic newsletter (distributed by email or published on its website) a printed copy is fine. If the newsletter is available on the web site the copy must have the web address of the page where the newsletter is located. In the case of an email distributed newsletter, provide a copy of the emailed newsletter, including the TO: field indicating what emails it was sent to.

**Item #2** – Submit the chapter’s website address.

**Item #3** – Attach a portion of the fax and/or e-mail distribution list for documentation.

## **PACESETTER AWARD - continued**

### **IV. MEMBERSHIP:**

**Item #1** -- Show formal membership contest through announcements, promotion materials and board reports.

**Item #2** -- To determine the net membership gain for your chapter, the awards chair may have to contact NAHU's chapter relations manager. The number submitted is subject to verification by the NAHU Awards Committee. The information is also available on NAHU's website.

**Item #3** -- (No documentation info included in original)

### **V. PUBLIC SERVICE PROJECTS:**

**Item #1** -- Announcements to membership, board committee reports and newsletter articles may document the public service projects your chapter has sponsored.

**Items #2** -- Photographs are not considered documentation. Public service contributions are a percentage of gross income and documentation must be provided. Each fund raiser is considered one project. Total amount donated during year and bonus points for significant amounts contributed may be documented in the treasurer's reports, checks presented and board minutes, with dates or a letter from the recipient. Other suggested documentation: copy of chapter's complete budget with line item details. Project must be completed within the awards year.

Documentation needs to include proof of promotion and activity, i.e. newsletter articles, media coverage, website coverage, meeting announcement, etc. Do not submit just a canceled check.

Submission needs to include description of project or event. Documentation needs to show that event/meeting/project occurred.

### **VI. MEDIA RELATIONS:**

**Items #1 & 4** -- May be documented with board minutes, reports and other communications pieces. Must be listed with NAHU database.

**Item 2** -- Include a list with all information requested. Must have a complete list including contact name, phone, address, email address and name of paper. Incomplete listing will not receive credit.

**Item #3** -- Include copies of all letters, articles and press releases. 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. Copies are not accepted, documentation must be the original news article/paper.

**Item #4** -- "Working with the Media" presentation must be documented and held at a membership meeting or a strategic planning session.

### **VII. BOARD ACTIVITY:**

Most of the documentation for this section comes from dated board minutes, committee reports and newsletter articles. For HUPAC member support, the awards chair will need to contact NAHU's manager of legislative communications to obtain a list of the members who supported HUPAC during the prior year. This information is also available on NAHU's website.

**Item #1** - Documented state program must be Strategic Planning and NOT Leadership Planning.

**Item #2** - Local chapter is responsible for the leadership training, not strategic planning. Regular board meetings are not considered training or workshops.

**Item #4** -- Points are based on HUPAC donations, not state PAC donations. This information is verified by the national office.

## **PACESETTER AWARD – continued**

### **VII. BOARD ACTIVITY (cont'd):**

**Item #5** – All meetings for requested points must be documented. Must show documentation for 12 meetings in order to receive credit for monthly meetings.

**Item #6** -- Provide documentation for how the budget was made available to the chapter's membership, i.e. web site, newsletter, minutes, etc.

### **VIII. EDUCATION:**

**Items #1** -- Points will be awarded for the following designation acquired during the January 1 – December 31 award year timeframe; RHU, REBC, DIA, LTCP, CSA, CLTC. To document the chapter recipients of these designations, print the list in the Awards section of NAHU's website and highlight the chapter's recipients.

**Item #2** – 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.

### **IX. AWARDS:**

**Item #1** – For points to be awarded for each LPRT qualifier, the awards chair must list names. Since the deadline to submit LPRT forms for the current year is coincident with submitting NAHU awards, the list that you should use for points and documentation would be the LPRT winners recognized at National Convention the prior year. Although these are the LPRT qualifiers for the prior period, the announcement and recognition occurs during current award period. This list is posted in the Awards section of NAHU's website.

**Item #2** – The announcement regarding the date of the award recognition service suffices as documentation. Articles in newsletter or committee reports may be used.

### **BONUS POINTS**

Bonus points will be awarded 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. 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.

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 winning **TOP ASSOCIATION OF THE YEAR!**

## **DOCUMENTATION SUGGESTIONS FOR MEDIA RELATIONS AWARD**

The four Media Relations Awards are presented to the state and local chapters with the highest points. One award will be presented to a state chapter with over 250 members and one award will be presented to a state chapter with 250 or less members. One award will be presented to a local chapter with over 150 members and one award will be presented to a local chapter with 150 or less members.

Each page of your documentation should be numbered and labeled to correspond with the section it supports. (Example: Page 10, Section 11, Item 1)

Download and print two copies of the application form/score sheet. Use one copy to keep a record of the items you have collected and the second copy of your completed score sheet that you will include with your submission.

Your submission must be signed by the current chapter president.

### **PREPARATION AND OUTREACH SECTION:**

**Item #1** – Will be verified by NAHU.

**Item #2** - The list of local media contacts must include all information requested; Name, publication or broadcast station, address, phone, fax and email. If all of this information is not supplied the list will not be counted for points.

### **PRESS “HITS”:**

**Item #1** - Information published in news articles or features must mention either the national, state or local chapter of Association of Health Underwriters.

**Item #5 & #6** – State and local organizations can discuss their position as long as it does not conflict with NAHU’s position.

In general all articles submitted for documentation need to include the publication name and the date of publication. Original articles should be submitted whenever possible.

An additional resource to assist in applying for this award is the PowerPoint presentation “Understanding the Media Relations Award Criteria” available online in the Awards Section of NAHU’s website; <http://www.nahu.org/awards/Awards.htm>.

## **DOCUMENTATION SUGGESTIONS FOR PRESIDENTIAL CITATION AWARD**

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:** Chapter may not submit NAHU designed/formulated press releases. 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 or board reports.

**Item #9 – Meet with State Insurance Commissioner:** Documentation can include items such as newsletter article, minutes, board reports, dated thank you letters, emails or any item that confirms your visit.

**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, 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 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

## **DOCUMENTATION SUGGESTIONS FOR ROBERT W. OSLER EDUCATION AWARD**

**Item #1** – NAHU staff will verify that a Education Chair was appointed. A list of chapter officers can be seen on NAHU’s website at <http://www.nahu.org/chapters/SEARCH/index.cfm>

**Item #2** – Documentation: Highlight education chair’s name on regional meeting attendance list.

**Item #3** – 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.

**Item #4** – 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. Possible forms of documentation are announcement flyers, board minutes, articles or promotional information in chapter newsletter including time, date and place of Sales Convention or seminar

**Item #5** – DOI APPROVED continuing education programs must be documented with an announcement flyer indicating number of hours offered and the DOI approval certificate. Please mark documentation with highlighter, tabs, etc.

**Item #6** – Points will be given for providing each one of the eight education programs listed. The programs must be documented with an announcement flyer, board minutes, articles or promotional information in chapter newsletter including time, date and place

**Item #7** – Points will be awarded for the designation(s) received by a chapter member during the January 1 – December 31 calendar year during the award timeframe. The recognized designations are RHU, REBC, DIA, LTCP, CSA, CLTC. To document the chapter recipients of these designations, print the list in the Awards section of NAHU’s website and highlight the chapter’s members.

**Item #8** – Education programs must be documented with an announcement flyer indicating number of hours offered and the DOI approval certificate. Recognized designations are: RHU, REBC, EHB, DIA, LTCP, CSA, CLTC.

**Item #9** – NAHU’s education department will provide attendee lists upon request. Provide a copy of this list with chapter members’ names highlighted.

**Item #10** – To document the presentation of the education PowerPoint submit meeting notice, board minutes or announcement including, time, date and place of the presentation.

**Item #11** – To document the media advisories presented to the press, provide a copy of the original newsletter with the article informing the membership and general public of the event sponsored by the chapter. Make sure that the item submitted includes the publication’s name and the date of publication. Publications in state and local newsletters are not eligible for points

## DOCUMENTATION SUGGESTIONS FOR WEBSITE AWARD

The active website is the required documentation for this award. The completed application form and score sheet must be submitted. The Awards Committee reviews and judges the applications while viewing the active website.

**Section I – CHAPTER HOME PAGE:** Everything in this section must be mentioned specifically and reachable in one click from the Home Page.

**Item #1** – Contact information must be included with each Board member. Phone and email address are sufficient.

**Item #2** – May be included as part of the Board list.

**Items #3 & #4** – Membership application may be a link to the membership application on the NAHU page.

**Item #5** – May be in any format but must be in one location *and must be current*.

**Item #7** – Upcoming opportunities for CE through the chapter must be in one location.

**Item #8** – Items included in Sections II and III will not count as “other”.

**Section II – LINKS:** *Note: All items in this section must be direct link to the required item.*

**Item #1** – Must be a direct link to Legislative news at Nahu.org.

**Item #3** – Links to HUPAC must be in a member-protected area by law. Please consult your state’s laws regarding links to your state PAC’s forms.

**Item #5** – Must be industry-related links. Items counted elsewhere will not count as “other”.

**Item #6** – Must be a direct link to [www.nahu.org](http://www.nahu.org).

**Item #7** – Must be a direct link to Nahu.net information.

**Item #8** – Must be a direct link to the benefits of membership at [www.nahu.org](http://www.nahu.org). Note: Links must be updated. Broken links will not count.

**Section III – MISCELLANEOUS:**

**Item #1** – List state and/or local awards offered by your chapter with criteria.

**Item #2** – Provide a way to apply for or nominate for awards in Item #1.

**Item #4** – May be an email distribution list, bulletin board or chat room.

**Item #5** – May not be a link to YODA, but may be in a similar “search” format.

**Item #10** – Must be a search engine that allows a site-specific search.

**Item #11** – Items count elsewhere will not count as “other”.

Bonus points will be awarded based on user-friendliness and ease of finding the specified items.

## **DOCUMENTATION SUGGESTIONS FOR DISTINGUISHED SERVICE AWARD**

Please refer to the rules and nomination form for the correct organization of the award submission. Follow the nomination form outline as the guideline for the submission organization. Items on checklist for points must have backup documentation even if mentioned in narrative. Be specific about what points are being taken for credit.

**Item #1** – Submit a copy of the YODA printout. Will be verified by NAHU.

**Item #2** – Refers to non-NAHU organizations. Submit as documentation announcements, flyers, etc., from the organization describing the nominee’s participation.

**Item #3** – 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.

**Item #4** – Non-industry related groups. Submit church bulletins, minutes from meetings, newsletter articles, letters from organization documenting position and type of service provided by nominee.

**Item #5** – Submit a letter listing events attended. Attendance at National events will be verified by NAHU. Regional VP must document verification of attendance at Regional events.

**Item #6** – 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.)

**Item #7** – Submit list of designations obtained. Will be verified by NAHU

**Item #8** – Submit list of years qualified. Points are accumulated per year to a maximum of 14 (lifetime status). Will be verified by NAHU.

**Item #9** – NAHU participation; submit Board minutes, committee reports, newsletters, letters, etc.

**Item #10** – Industry related only; submit minutes, official meeting notes, testimonial letters, etc. as documentation.

**Item #11** – Submit letter stating years qualified. Will be verified by NAHU.

## **DOCUMENTATION SUGGESTIONS FOR WILLIAM G. WETZEL PUBLIC SPEAKING AWARD**

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.

Testimonial letters (**Item #5**) or evaluation forms should accompany the Speakers Nomination Form (**Item #4**). This form requires the signature of the speaker.

Sponsor letters (**Item #3**) and a presentation outline (**Item #6**) are required and should be attached to the Speakers Verification Form (**Item #4**). This form requires a signature from someone that can verify the presentation.

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

An appropriate submission would consist of:

- Letter from the chapter sponsoring the person for the award, attesting to their ability and contribution to the industry.
- Table of Contents, listing each speaking engagement, date, topic, location, etc.
- A tab for each presentation, behind which includes: 1) Speaker's verification form (completed by the person verifying the presentation – typically from whoever booked this person to speak and usually an officer or CE Chair); 2) Speaker's nomination form (completed by the person that did the speaking, or the nominee); 3) Outline of the presentation (copies of power point presentations work really well here, or program with hand out material); 4) Any other communications that may serve to describe the engagement ... such as announcements, citations, newspaper articles, etc.

## **DOCUMENTATION SUGGESTIONS FOR WILLIAM F. FLOOD PUBLIC SERVICE AWARD**

Select a single public service project to present to the Awards Committee in your submission. Please include a narrative about your project, describing the event, the benefactor, type of community service, goals and objectives, etc. **BRAG A LITTLE!!** Pictures help convey your story, but make sure to include captions with date, who is in them and what they show.

**Item 1** – Appropriate documentation is a record of committee work (agendas, minutes of meetings, etc.) with details of work completed, who attended, etc.

**Item 3** – A member survey, feedback form, board minutes, newsletter article, website bulletin, etc. Communication must request input from the membership. Results must be provided or included in documentation (i.e. board minutes).

**Item 4** – Provide copy of announcement to membership.

**Item 7** – Include description of organizational involvement in the project. Documentation can include attendance list identifying names of members, list of contributing members, and list of members working the event, etc.

**Item 8** – Documentation could include treasurer's report, project financial report, promotional ceremony, media coverage, newsletter announcement, detailing amount.

**Item 9** – Press release, press hits, newspaper and newsletter articles, promotional activity via mail, websites, etc.

**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.

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, as the awards chair of your chapter, you will feel a great sense of pride in your accomplishment!

## Appendix

### Awards Committee and Regional Chairs

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