



Local

AWARD OF EXCELLENCE



Jack E. Bobo

AWARD OF EXCELLENCE

2009-2010

The Jack E. Bobo Award of Excellence was developed at the recommendation of the Transformation Task Force Report of April 2003. The award is based on the critical components identified as crucial to strengthening the NAIFA Federation and increasing membership. This award has been named in honor of Jack E. Bobo, CLU, FLMI, who proudly served NAIFA as National President and as Executive Vice President. Additionally, Jack E. Bobo is a recipient of the prestigious John Newton Russell Award. Appropriately, this award recognizes associations and their leaders who excel in all facets of association management including Advocacy, Governance, Membership, and Programs and Professional Development.

The purpose of the Jack E. Bobo Award of Excellence is to: 1) ensure the award is a guidepost for progress towards improving local & state associations to deliver at least minimum standards in all mission critical areas; 2) reward those exceeding minimum standards in all primary areas defined in NAIFA in the 21st Century; and 3) give special recognition to those associations who exceed those standards to a high degree (associations who can serve as models for others).

WINNING CRITERIA:

The Jack E. Bobo Award of Excellence may be achieved on one of three levels.

- **Platinum** (Well Exceeds Expectations — 95 + points) A local association cannot achieve this level without reaching 100% of their national membership goal.
- **Gold** (Exceeds Expectations — 85 to 94 points) A local association cannot achieve this level without their membership total increasing by 1 from the prior year.
- **Silver** (Meets Expectations — 75 to 84 points) A local association cannot achieve this level without their membership total increasing by 1 from the prior year.
- **Honorable Mention** (95+ points) A local association cannot achieve this level without reaching a minimum of 95% of their national membership goal.

INSTRUCTIONS:

1. Deadline for completion and submission is July 9, 2010

The Jack E. Bobo Award of Excellence application has complete online capability. You may submit your application online at www.naifa.org/benefits/awards/bobo.cfm or submit a hard copy in a three ring binder to: NAIFA-Award of Excellence, 2901 Telestar Court, Falls Church, VA 22042.

Award applications and all supporting materials must be **postmarked** or submitted online by July 9, 2010. If you elect to submit a three ring binder it must be properly organized and labeled, if it is not it will not be reviewed. We recommend you use a form of mail that may be tracked, such as return receipt requested, certified mail, or overnight mail services such as UPS, DHL, or FedEx.

2. Supporting material is required for many questions in order for points to be awarded. If supporting material is not provided as requested and clearly labeled to correspond to the question (Example D:1), points will not be earned. You CANNOT use the same documentation more than once to answer multiple questions. Supporting material CANNOT be handwritten and must be typed.

For questions that can be answered by pre-printed materials, please label with the section and question number (Example A:1), or points may not be earned. Any supporting material that is not appropriately labeled or explained may not be reviewed.

- 3. All IFAPAC contribution information is for the 2009 calendar year, therefore all IFAPAC activities (including contributions counting toward participation and dollar amount goals) must be received at NAIFA by December 31, 2009.
- 4. All answers will be subject to verification by NAIFA. Some Membership, IFAPAC, and APIC information will be verified by NAIFA records.
- 5. If you wish for your application to be returned to you following the 2010 NAIFA Career Conference and Annual Meeting, you must include a self addressed envelope large enough to hold your application with the appropriate prepaid postage.

ASSOCIATION & VERIFICATION INFORMATION:

Association Name	Association Number	State
Name	Position	
<i>The information provided in this application is accurate and complete to the best of my knowledge.</i>		
Signature	Date	

BEFORE AN APPLICATION IS TO BE CONSIDERED THE LOCAL ASSOCIATION MUST COMPLETE THE FACT FINDING SECTION IN ITS ENTIRETY.

FACT FINDING SECTION

1. Tax Identification Number (TIN): _____
2. IRS Determination Letter Issued? Yes No (If yes, please attach a copy. For information visit www.irs.gov/charities/index.html)
3. Tax Return (or information) filed with IRS for most current fiscal year? Yes No (For information visit www.irs.gov/charities/index.html.)
4. Current bylaws have been approved and have been filed with the State and National Association within the last two years? Yes No
5. Did your local association report their officers and mandatory committee chairs by the June 30 deadline and have voting privileges at the 2009 Annual NAIFA Convention and Career Conference? Yes No

A ADVOCACY/GOVERNMENT RELATIONS (32 POINTS)

1. Does your local association have an IFAPAC and APIC Chair? ♦ **PROVIDE NAME & ID NUMBER.**
 IFAPAC Chair – **1 point** APIC Chair – **1 point** **Points:** _____
2. Did your local association hold a fundraising event to raise money for IFAPAC?
♦ **INCLUDE DESCRIPTION** **2 points**
3. Did your local association send three written communications to its members dedicated to IFAPAC?
♦ **SUBMIT COPIES OF EACH** **2 points**
4. Did your local association hold and actively promote either a local legislative day or a local legislative forum, so members could attend and interact with state and/or federal legislators and their staff?
♦ **INCLUDE DESCRIPTION** **2 points**
5. Did your local association increase their IFAPAC *contributions* over the prior year?
 5% to 11% increase – **1 point** 12 % or greater increase – **3 points** **Points:** _____
6. Did your local association increase their IFAPAC *contributors* over the prior year?
 5% increase – **1 point** 12 % or greater increase – **3 points** **Points:** _____
7. Did *all* of the members of your Board of Directors contribute to IFAPAC at either the “Ambassador” – \$200-299 (or higher), “Century” – \$100-199, “Investor” – \$50-99, levels? ♦ **PROVIDE A LIST OF YOUR BOARD AND THEIR CONTRIBUTION AMOUNTS.**
 “Ambassador” or higher – **5 points** “Century” – **3 points** “Investor” – **2 points** **Points:** _____
8. What percentage of your membership contributed to IFAPAC?
 50% – **5 points** 40% – **3 points** 35% – **2 points** **Points:** _____
9. Did your local association report the names of new NAIFA member APIC contacts who have relationships with their federal and state legislators and provide an updated list to the State APIC Chair and/or NAIFA and did they meet with their legislators at least twice during the year?
♦ **PROVIDE LIST OF NAIFA MEMBERS WITH LEGISLATIVE CONTACTS INDICATED** **4 points**
10. Did your local association have at least two representatives at your state Day at the Capital or state legislative event?
♦ **PROVIDE LIST OF NAIFA MEMBERS WITH REPRESENTATIVES INDICATED** **4 points**
11. Did your local association communicate and discuss state and federal legislative issues with your members at *every* meeting?
♦ **INCLUDE DESCRIPTION** **2 points**

TOTAL POINTS SECTION A

B GOVERNANCE & ADMINISTRATION (27 POINTS)

1. Did your local association conduct planning sessions with their leadership teams (separate from board meetings) throughout the year?
♦ **SUBMIT DATES AND OUTLINES** **2 points**
2. Submit a copy of your local association’s annual action plan and explain how you met all of your goals/objectives. If you did not reach any of your goals/objectives explain why and where improvements may be made.
2 points
3. Did your local association promote the Managers Membership and Industry Awards, and designations?
♦ **INCLUDE DESCRIPTION** **2 points**
4. Did your local association provide recognition for long time members, those receiving the Managers Membership and Industry Awards, and any new designations?
♦ **INCLUDE DESCRIPTION** **1 point**

5. Did your local association educate current members about available benefits and sales training?
◆ **INCLUDE DESCRIPTION** **1 point**
6. Did your local association survey members for feedback on meetings, programs, etc.?
◆ **SUBMIT COMPLETE SUMMARY OF RESULTS** **1 point**
7. Did your local association hold a NEW member orientation?
◆ **INCLUDE DESCRIPTION** **2 points**
8. Did the following leaders attend either the state ALC, LSP, or any other training provided by the state?
◆ **SUBMIT DATE AND OUTLINE**
- | | | |
|---|--|---|
| • (minimum for all)
2 points
i. President
ii. President-Elect
iii. Association Executive (if applicable)
iv. National Committeeperson | • (will also include those listed above)
3 points
i. Government Relations Chair
ii. Membership Chair
iii. Professional Development & Programs Chair | • (will also include – Everyone)
5 points
i. Secretary
ii. Treasurer
iii. Health Chair |
|---|--|---|
- Points:** _____
9. Did your local association receive any media coverage? (Radio, Local/State Newspaper, Television)
◆ **INCLUDE DESCRIPTION** **3 points**
10. Did your local association achieve the 2009 AHIA Award of Excellence?
2 points
11. Did your local association sponsor a charitable program? Include description.
2 points
12. Did your local association have members graduate from a LILL institute during the fiscal year?
 2 or more graduates – **4 points** 1 graduate – **2 points** **Points:** _____
- TOTAL POINTS SECTION B** _____

C MEMBERSHIP (37 POINTS)

1. Did your association reach your NAIFA membership goal for the year?
 100 % – **20 points** 95 to 99.99% – **15 points** Increase begin year count by 1 – **10 points** **Points:** _____
2. Was a membership presentation made at a venue that had non-members in attendance? (Agency presentation, LUTC or FSS class etc.)
◆ **SUBMIT DATE AND NAME OF PRESENTER** **1 point**
3. Did your local association attain 85% renewal retention?
3 points
4. Did your local association reach the following NAIFA membership benchmarks?
 Dec. 31st – 2nd Benchmark: **1 point** March 31st – 3rd Benchmark: **1 point** **Points:** _____
5. Did your local association increase in membership size by 10% or more over your NAIFA membership goal?
3 points
6. Did your local association create a membership development plan at the beginning of the year?
◆ **PLEASE SUBMIT A COPY.** **3 points**
7. Did you recruit any new members from an agency membership presentation? ◆ **PLEASE PROVIDE THE NAMES & ID NUMBERS.**
 8 new – **5 points** 4 new – **3 points** 2 new – **2 points** **Points:** _____
- TOTAL POINTS SECTION C** _____

D PROGRAMS & PROFESSIONAL DEVELOPMENT (25 POINTS)

1. Did your local association provide programs of interest for members in the areas of Life & Annuities (L&A), Health & Employee Benefits (H&EB), Multiline (ML), Financial Advising & Investments (FA&I), and a Legislative Day.
 SUBMIT CALENDAR LISTING ALL MEETINGS AND TOPICS **3 points**
2. What percentage of your local association membership participated in a LUTC, FSS, or Horizon class that you sponsored? (Online classes included)
 8 % or more – **4 points** 4% – **2 points** **Points: _____**
3. Did your local association provide a venue outside of regularly scheduled meetings to increase networking opportunities for your members? (Ex. YAT networking event, study groups, online communication venue, mentoring program)
 INCLUDE DESCRIPTION **2 points**
4. Did your local association get your city/town to proclaim September Life Insurance Awareness Month?
 INCLUDE DESCRIPTION **5 points**
5. What actions did the local association take as a result of your member surveys that were conducted?
 INCLUDE DESCRIPTION **1 points**
6. Does the local association actively promote LILI and YAT initiatives?
 INCLUDE DESCRIPTION **2 points**
7. What was the highest member percentage attendance at any non-social event? Submit roster indicating the date and who attended the meeting. Use the final membership number from the previous year as your base.
 75% – **4 points** 50% – **2 points** 35% – **1 point** **Points: _____**
8. Did your local association offer CE credits at its local meetings? Provide dates, course names, and CE credit amount.
 8 or more credits – **4 points** 4 credits – **2 points** **Points: _____**

TOTAL POINTS SECTION D

E SUPER BONUS

1. Submit a *new* creative idea that your association tried this year that worked. It may be a program or project that your association tried to improve in the areas of Advocacy, Membership, Sales Training and Education, and Networking. You *cannot* use any supporting documents or descriptions that you may have already used for a previous question. The judges are looking for something unique and creative. Decision by judges is final.

Up to 4 points

TOTAL POINTS SECTION E

Jack E. Bobo Association Award of Excellence **DEDICATION**

It has been said many times “We stand on the shoulders of those who come before us.” Robert L. Rose, Louis I. Dublin and E. Dawn Nuckels were giants in our industry. The strengths and character of these three men embody the very values we seek to recognize with the Jack E. Bobo Award of Excellence. Louis I. Dublin (NAIFA Community Service Award), Robert L. Rose (NAIFA Professional Development Award), and E. Dawn Nuckels (IFAPAC Award), were truly men of vision, dedication and integrity. Their collective memories will be forever preserved within this prestigious award.



Robert L. Rose

In the mid 1970s Robert L. Rose served as Chairman of the NALU Education Committee which was very successful in getting out the message on the value of life insurance. In 1976, Rose's Education Committee established life and health insurance reference shelves in many public and school libraries. The committee also developed a 12-week adult-education course in family finance and money management in a number of localities. After Rose's unexpected death in 1980, the NALU Board voted to name the Education Achievement Award (established in Sept. 1979) the “Robert L. Rose Education Achievement Award,” given to local and state associations for excellence in providing professional and consumer education on life insurance.



E. Dawn Nuckels

Evers Dawn Nuckels was the California Association of Life Underwriters President from 1968-1969, National Committeeperson from 1970-1984 and chair of the NALU Political Action Committee in 1986. For 14 years, he served as CALU National Committeeperson at NALU conventions. Nuckels' high standards of conduct, diplomacy and effectiveness helped guide IFAPAC through a period of explosive growth, raising IFAPAC into the echelons of national PACs. Nuckels was instrumental in positioning IFAPAC as the most effective way agents and advisors can positively impact both state and federal elections.



Louis I. Dublin

In 1957 NALU joined the Institute of Life Insurance in giving formal recognition to the tradition of community service with the institution of the Public Service Program. Earlier that year, Dr. Louis I. Dublin, consultant on health & welfare at the Institute of Life Insurance, announced that the first annual public service award was to be given. When the award was renamed for Dr. Dublin, Holgar Johnson, as Past President of NALU, said, “we wish to establish a living memorial to a man who represents Public Service in its highest sense.” This new award was given, for the first time, in 1961 at the NALU Convention in Denver, Colorado.