



State



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 state association cannot achieve this level without reaching 100 % of their national membership goal set by the National Membership Committee.
- **Gold** (Exceeds Expectations — 85 to 94 points) A state association cannot achieve this level without achieving 95–99.99 % of their national membership goal set by the National Membership Committee.
- **Silver** (Meets Expectations — 75 to 84 points) A state association cannot achieve this level without their membership total increasing by 1 from the prior year.

INSTRUCTIONS:

1. Deadline for completion and submission is June 30, 2010

The Jack E. Bobo Award of Excellence application has complete online capability. You may submit your application online at <http://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 June 30, 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.

- 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.
- 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.
- All answers will be subject to verification by NAIFA. Some Membership, IFAPAC, and APIC information will be verified by NAIFA records.
- If you wish for your application to be returned to you following the 2010 NAIFA Convention and Career Conference, 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 STATE 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 updated and approved by NAIFA National within the last two years? Yes No
5. Did your state 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
6. Directors and officers insurance policy in effect? Yes No

ALL QUESTIONS HIGHLIGHTED IN BLUE MUST BE ANSWERED TO ACHIEVE ANY LEVEL OF EXCELLENCE. THESE QUESTIONS HAVE BEEN LABELED MINIMUM STANDARD QUESTIONS.

A ADVOCACY/GOVERNMENT RELATIONS (40 POINTS)

1. Does your state association have an IFAPAC and APIC Chair? ▶ **Provide Name & ID number**
 IFAPAC Chair – **1 point** APIC Chair – **1 point** **Points: _____**
2. Did your state association hold a fundraising event to raise money for IFAPAC?
▶ **INCLUDE DESCRIPTION** **2 points**
3. Did your state association send four written communications to its members dedicated to IFAPAC?
▶ **SUBMIT COPIES OF EACH** **2 points**
4. Did your state association hold and actively promote in every newsletter or magazine a state legislative day/forum, so members could interact with state and/or federal legislators and their staff?
▶ **INCLUDE DESCRIPTION** **2 points**
5. Did your state association represent the interests of its members by monitoring, lobbying, and initiating legislation before the state legislature and regulatory bodies throughout the year?
▶ **INCLUDE DESCRIPTION** **3 points**
6. Did your state association communicate issues involving state and federal legislation at minimum of once every quarter to your statewide general membership?
▶ **INCLUDE DESCRIPTION** **2 points**
7. Did your state association increase their IFAPAC *contributions* over the prior year?
 5% to 11% increase – **1 point** 12 % or greater increase – **3 points** **Points: _____**
8. Did your state association increase their IFAPAC *contributors* over the prior year?
 5% to 11% increase – **1 point** 12 % or greater increase – **3 points** **Points: _____**
9. Does your state association have an action plan in place to address urgent legislative issues?
▶ **SUBMIT PLAN** **2 points**
10. Are all members of your state legislature assigned an APIC contact?
▶ **PROVIDE A LIST OF ALL STATE LEGISLATORS AND THEIR NAIFA CONTACTS** **2 points**
11. Do all Federal members of Congress in your State have at least 2 APIC contacts and did the contacts meet with their legislators at least twice during the year?
▶ **LIST ALL OF YOUR STATE'S MEMBERS OF CONGRESS AND THEIR NAIFA CONTACTS AND PROVIDE DATES OF VISITS** **2 points**

12. Did your state association have 100% of their local associations participate in the state Day at the Capital?
▶ **PROVIDE DATE AND PARTICIPATING ASSOCIATIONS** **2 points**
13. Did your state association schedule and attend meetings with legislators in conjunction with the National Leadership Conference?
▶ **PROVIDE LIST OF NAIFA MEMBERS AND THE CONGRESSIONAL OFFICES THEY VISITED** **1 point**
14. Was your state association able to affect any legislative or regulatory issues pertinent to NAIFA members in your state?
▶ **INCLUDE DESCRIPTION** **1 point**
15. Did all members of your State Board of Directors contribute to IFAPAC at either the "Envoy" – \$500 to \$999 (or higher), "Statesman" – \$300 to \$499, "Ambassador" – \$200 to \$299, levels? ▶ **PROVIDE A LIST OF YOUR BOARD AND THEIR CONTRIBUTION AMOUNTS**
 "Envoy" or higher – **5 points** "Statesman" – **3 points** "Ambassador" – **2 points** **Points: _____**
16. What percentage of your total state membership contributed to IFAPAC at least at the Investor level (\$50)?
 45% or above – **4 points** 35% – **2 points** 25% – **1 point** **Points: _____**

TOTAL POINTS SECTION A

B GOVERNANCE & ADMINISTRATION (27 POINTS)

1. Did your state association enforce the NAIFA branding and give support to help locals change their name?
▶ **INCLUDE DESCRIPTION** **1 points**
2. Did your state association provide continued support/training to ALL local committee chairs throughout the fiscal year?
▶ **INCLUDE DESCRIPTION** **2 points**
3. Submit a copy of your state 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
4. Did your state association survey members for feedback on events, programs, etc.?
▶ **SUBMIT COMPLETE SUMMARY OF RESULTS** **1 point**
5. Did your state association contact *NEW* members using the SOAR Program?
▶ **INCLUDE DESCRIPTION** **2 points**
6. Did your state association provide membership campaign coordination between NAIFA National and your locals?
▶ **INCLUDE DESCRIPTION** **1 points**
7. Did your state association participate in the Local Success Planning Program this fiscal year?
▶ **INCLUDE DESCRIPTION** **1 points**
8. Did your state association get their state government to proclaim September Life Insurance Awareness Month?
▶ **INCLUDE DESCRIPTION** **4 points**
9. Did all of your local associations sponsor a charitable program?
▶ **LIST ALL LOCALS AND THE PROGRAM** **1 point**
10. Did your state have 100 % of the voting delegates at the 2009 NAIFA Convention and Career Conference?
2 points
11. Did your state association achieve the 2009 AHIA Award of Excellence?
2 points
12. Did your state association have members graduate from a LILI institute during the fiscal year?
 8 or more graduates – **4 points** 4-7 graduates – **2 points** **Points: _____**
13. What percentage of your local associations reported their federal ID number and non-for-profit status? ▶ **LIST ALL LOCALS AND THEIR ID NUMBER.**
 100% – **4 points** 75% – **2 points** 50% – **1 point** **Points: _____**

TOTAL POINTS SECTION B

C MEMBERSHIP (37 POINTS)

1. Did your state 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 state association attain 85% renewal retention?
3 points
4. Did your state association reach the following NAIFA membership benchmarks?
 Dec. 31st – 2nd Benchmark: **1 point** March 31st – 3rd Benchmark: **1 point** **Points: _____**
5. Did your state association increase in membership size by 10% or more over your NAIFA National membership goal?
3 points
6. Did your state association create a membership development plan at the beginning of the year and submit it to your NAIFA National Membership Committee Liaison?
3 points
7. Did your state recruit any new members from an agency membership presentation? ▶ **PLEASE PROVIDE THE NAMES & ID NUMBERS.**
 25 new – **5 points** 15 new – **3 points** 10 new – **2 points** **Points: _____**

TOTAL POINTS SECTION C

D PROGRAMS & PROFESSIONAL DEVELOPMENT (17 POINTS)

1. Did 100% of your local associations have representation at your Association Leadership Conference/Local Success Planning or another training venue that the state provided?
▶ **SUBMIT LIST OF REPRESENTED ASSOCIATIONS AND WHAT THE TRAINING VENUE WAS.** **4 points**
2. Did your state association educate members on available member benefits and sales training offered by the state? (Do not include national programs)
▶ **INCLUDE DESCRIPTION** **3 points**
3. Did your state association provide a list of approved CE courses to your local associations?
▶ **SUBMIT A LIST OF ALL COURSES PROVIDED AND HOW MANY CE CREDITS.** **3 points**
4. Did your state association provide programs to advance the advisor's business and professional education?
▶ **INCLUDE DESCRIPTION** **4 points**
5. Outside of NAIFA National programs provided, does your state association offer discounts on products or services?
▶ **INCLUDE DESCRIPTION** **3 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.



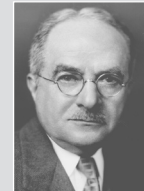
Robert L. Rose

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.