

National Association of Health Underwriters

AWARDS GUIDEBOOK



www.nahu.org

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IMPORTANT NOTICE – Legislative awards are now submitted to the Legislative Council and NOT the Awards Committee. These awards are due January 10th.

Section 1: General Information about NAHU'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.

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 individual members for excelling in education, advocacy and professionalism.

Strategic Planning: Chapter leaders can use the Landmark and Pacesetter 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.

State and Local Awards Chair Responsibilities & Job Description:

- Assist Awards Chairs and Chapter Officers with awards
- Coordinate collection and documentation of all chapter activities
- Organize and lead Awards Committee
- Encourage chapters and deserving members to apply for awards
- Provide feedback on awards issues
- 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 review:

- All current awards applications
- Award 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
- Individual
- Member

Promoting NAHU Award 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. A couple of examples of a local award might be top new member recruiter or volunteer of the year. NAHU depends on the Awards Chair 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.

Section 2: Timeline to Organize, Compile & Submit Your Award Submission

The deadline to submit most award nominations to NAHU is **April 5**. The Awards Committee will not consider applications received after the deadline date. *(If April 5 should land on a weekend, applications will be accepted on the following Monday.)*

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.

IMPORTANT NOTICE – Legislative awards are now submitted to the Legislative Council and NOT the Awards Committee. These awards are due January 10th.

Kick Off - Twelve Months prior to the deadline

Engage your chapter's executive team in the awards process. Make sure that the different chairs are providing you with information regarding their specific activities and documentation. Set up electronic files so chairs can submit the information as needed. It is your job to provide a process to collect, organize and submit the information.

Quality Control - 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 chairs to email all documentation supporting events or meetings held to you.

Fill In Gaps - Two months prior to the deadline

Begin organizing your submission(s) by reviewing the data you have accumulated to determine what documentation is missing and needs follow-up.

Assemble Submission(s) - One month prior to the deadline

Organize the award submission, enter points into the application and highlight key areas of the supporting documentation. Contact sources for any missing information required to complete the award application. **Make sure you highlight the area in the documentation that specifically addresses the criteria in that section.** The easier you make it to find the information, the easier it is for the Awards Committee to judge your submission and award points.

Peer Review - One to two weeks prior to the deadline

Have a fellow board member review the award application to ensure all information has been included.

Submit Early - Two to three days prior to deadline

Submit the award submission to NAHU. Keep an electronic or hard copy of everything you submit for your records along with confirmation of receipt from NAHU.

Section 3. How to Begin?

At the beginning of your year as Awards Chair:

- Review all NAHU awards to familiarize yourself with the criteria of each award. You can find the award criteria listed on the application for each award. All of the applications are available on NAHU's website.
- Assemble your files.
- Meet with your chapter president to coordinate the use of the Landmark or Pacesetter Awards in the strategic planning and/or leadership sessions.
- Attend all board meetings and events for your chapter.
- Review the specific documentation for your award submission and collect multiple copies of any documentation needed.
- Contact your regional awards chair to get acquainted and ask any questions.

As awards chair, it is important that you are organized, detailed, and actively involved in your association activities throughout the year. This participation will help you be aware of the chapter's accomplishments allowing you to better compile the required documentation.

Section 4: Awards –At-A-Glance

Award	Area of Achievement	Awarded to	# Given
Individual Awards			
Harold R Gordon Memorial Award*	Health Insurance "Person of the Year"	Individual Member	1
Distinguished Service Award	Volunteer Service	Individual Member	top 50% submitted
Vanguard Leader Award	Leadership Service	Individual Member	top 50% submitted
Presidential Citation Award	Excellence in Leadership	Chapter President	unlimited
Public Speaking, William Wetzel Award	Public Speaking	Individual Member	1
Chapter Award			
Pacesetter Award	Service to members & the industry	Local Chapter	top 50% submitted
Landmark Award	Service to members & the industry	State Chapter	top 50% submitted
Media Relations Award	Outstanding Media relations	Local & State Chapter	2 local/2 state
Website Award	Effective, easily navigated website	Local & State Chapter	top 50% submitted
Prof'l Development, Robert Osler Award	Professional development activities	Local & State Chapter	1 local/1 state
Public Service, William Flood Award	Public Service activities	Local & State Chapter	1 local/1 state
Community Service, Ouida Peterson Award	Community Service activities	Local	top 50% submitted
Regional Award			
Blue Chip Award	Regional Activity	Reg'l Vice President	8
Region of Excellence Award	Overall Regional Activity	Reg'l Vice President	1 large/1 small
Individual & Chapter Awards Application deadline: Receipt in NAHU office by April 5 Awards Period - April 1 - March 31 (unless otherwise indicated)			
Membership			
Recruiter of the Year	Most members recruited	Individual	1
Most new members	Most new members	Local & State Chapter	4 local/4 state
Highest Growth Rate	Highest growth rate	Local & State Chapter	4 local/4 state
Highest Retention	Highest retention rate	Local & State Chapter	4 local/4 state
Regional - Membership Awards			
NAHU Region of Membership Excellence	Best Overall Membership	Reg'l Vice President	1
Most New Members	Best Overall New Members	Reg'l Vice President	1
Highest Growth Rate	Best Overall Growth Rate	Reg'l Vice President	1
Highest Retention	Best Overall Retention	Reg'l Vice President	1
NO application needed for any membership awards - awarded by the Membership Council Membership Awards and Contest ending date: April 30 - Awards Period - May 1 - April 30			
Legislative Awards			
"Spirit of Freedom" Award	Overall Legislative Impact	Individual Member	1
Legislative Achievement Award	Legislative Activity	Individual Member	5
Legislative Excellence Award	Legislative Activities	Local and State Chapter	2 local/2 state
Awarded by the Legislative Council during NAHU's Capitol Conference Legislative Award Application deadline: Receipt in NAHU office by January 10.			

**This award is submitted by an individual NAHU member directly to the H.R. Gordon committee by May 5.

Section 5. FAQs

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

Generally speaking, awards judging takes place in a virtual environment over several weeks. The awards committee consists of a chair, vice chair, the eight regional awards chairs, NAHU Secretary, who serves as the Board of Trustees liaison and an NAHU staff member.

For the judging process, the committee is divided into teams of two. The teams review the applications independently. Each award application is reviewed by at least two teams. Each team signs off on the application and completes a feedback sheet.

No committee member is allowed to judge a submission from their home state, 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. (Except a judge from the state submission in question; in which case they are excluded from the discussion or from making comment).

What are the most common reasons points are disallowed on an awards application?

Lack of Documentation This occurs when an application takes points without proper documentation. All documentation criteria is listed directly in each application. If you have questions contact your regional awards chair.

Documented events, programs, and/or items do not meet the criteria

Sometimes documentation is received but does not meet the criteria. For example, sending four copies of newsletters but taking points for monthly newsletters. In this situation, we can only give credit for a quarterly newsletter since that is all that was documented. Another common mistake is to not include the documentation throughout the application. An example of this – board minutes are submitted in one section but not included in another section where documentation is required also. You can never over document.

Press Hits The AHU chapter or NAHU **must** be mentioned in published articles to count. (*NOTE: IF either AHU or NAHU are NOT mentioned in the published piece, you MUST show documentation that such information was included in the original submission to the publisher in order to receive credit for a Press Hit. The awards committee understands that you may not have any control over what is published. This exception ONLY applies to Op-Ed and Letters to the Editor. Chapter Press Releases MUST include the AHU chapter or NAHU in the published piece.*)

Double dipping - counting one meeting in more than one section An example would be a legislative meeting and then taking points again for the same meeting under regular membership meetings. We would allow the highest points, not both.

Confusing Leadership Training with Strategic Planning Leadership training is when you train your new board members on what their duties will be; explain what NAHU stands for, etc. Strategic Planning is when the chapter sets its long and short-term goals, budget amounts, etc.

Not knowing the difference between the media pieces Please check the media section of the NAHU website for clarification of what is what. The Media Relation Award also has been expanded in this area and will give you guidance on the difference in the media pieces.

Documentation is outside of the required timeframe or not dated at all Most awards criteria must be met between 4/1 through 3/31. There are some criteria that have a time period 1/1 through 12/31. The award will specify the criteria time period. The documentation must clearly state that criterion was met within the required timeframe.

Information submitted does not match NAHU's official records This happens when the information or points taken on the application do not correspond with what NAHU has on record for the chapter. The NAHU website has criteria lists that show what it has on record for the chapter. You can also view who is listed as chairs in your chapter to make sure the right people attend the right meetings to get the points. **You DO NOT have to submit any of the documentation if the criteria states “verified by NAHU” in the submission.** This is for your reference ONLY.

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 The number of “clicks” exceeds the stated maximum number of “clicks.”

Taking credit for more events then providing documentation for Documentation is provided for eight membership meetings but points were taken for 12 meeting. 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? Have someone else (a spouse or a friend) review the submission with the application in hand and see if they can find everything and it's clear. When the committee is judging your submission, they are not aware of who your members are, or what your chapter has accomplished. Be sure verification letters, etc. mention your chapter specifically. If an outsider can understand it, the committee will too. Be sure you **HIGHLIGHT** the important items. “Highlighting” is a generic term for emphasizing or calling out, underlines, circles, stars, etc. are acceptable means of highlighting.

Many of the awards have 50 bonus points for organization. What would cause us not to get all of those points? Most submissions are well organized and receive maximum points. It is unusual for a submission not to receive any bonus points. The most common reasons for disallowing all or part of them is when we have to search for information in other sections.

What kinds of points are based on NAHU's records? Do I need to document these items? These items are noted in the award application. If it says “verified by NAHU” then NO documentation is required.

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 criterion. If a specific person must fulfill a requirement (for instance, Leg Chair attending Cap Conference), the person officially reflected in NAHU records as holding that position must attend. Anyone else will not count.

Section 6 - Monthly Reminders:

If you are functioning as your state or local awards chairperson, you may find the following tasks helpful in communicating with your chapter leaders or other awards chairs.

July	<ul style="list-style-type: none"> • List of all awards 	<ul style="list-style-type: none"> ➤ Introduce yourself as their contact person and offer to help with any questions ➤ Send out a list of Awards Winners from National Convention ➤ Congratulate the winners in your chapter ➤ Encourage the use of Landmark/Pacesetter Awards in Strategic Planning and assignment of specific tasks by Committee Chair and/or Board Member
August	<ul style="list-style-type: none"> • Vanguard Leader • Distinguished Service 	<ul style="list-style-type: none"> ➤ Encourage everyone to attend Regional Meetings so they have the latest and greatest awards information available. ➤ Set up Dropbox account.
September	<ul style="list-style-type: none"> • Landmark 	<ul style="list-style-type: none"> ➤ Remind the chapters about the Awards Guidebook and award applications ➤ Recommend an individual for the State Legislative Achievement Award and encourage the submission
October	<ul style="list-style-type: none"> • Professional Development (Osler) • Public Speaking (Wetzel) 	<ul style="list-style-type: none"> ➤ Send out Awards At A Glance Matrix ➤ Encourage use of files or folders to keep the documentation sorted and organized ➤ Ask how the collecting and sorting of the awards information is going
November	<ul style="list-style-type: none"> • Media • Website 	<ul style="list-style-type: none"> ➤ Thanksgiving is a perfect time to do a community service project – look over the Public Service and Community Service Awards criteria
December	<ul style="list-style-type: none"> • Pacesetter 	<ul style="list-style-type: none"> ➤ Continue with the holiday theme - The holidays are the perfect time to make a Public Service donation for awards points
January	<ul style="list-style-type: none"> • Presidential Citation 	<ul style="list-style-type: none"> ➤ Review the documentation you have collected for areas of weakness; determine what's missing ➤ Organize documentation into sections ➤ Are there members in your chapter that need encouragement to apply for an award?
February	<ul style="list-style-type: none"> • Public Service (Flood) • Community Service (Ouida Peterson) 	<ul style="list-style-type: none"> ➤ Give status report to chapter board -- identify areas of weakness and solicit assistance ➤ Encourage assistance in filling the blanks in planned submissions over next 2 months
March	<ul style="list-style-type: none"> • Wrap up of awards • Submissions deadline 	<ul style="list-style-type: none"> ➤ Remind documentation contributors that the awards must be no later than April 5th ➤ Offer your assistance to answer questions or help in any way you can
April	<ul style="list-style-type: none"> • Awards Deadline 	<ul style="list-style-type: none"> ➤ Submissions are due on April 5!!
May	<ul style="list-style-type: none"> • Changes • Suggestions 	<ul style="list-style-type: none"> ➤ Encourage Awards Chairs to attend Annual Convention and go to the awards session ➤ Plan to attend the Awards Ceremony and celebrate the winners.
June		<ul style="list-style-type: none"> ➤ Congratulate all chapters for submitting

Section 7. Award Overview

- The applications **include all of the documentation**
- The new application is formatted in Excel and **allows for automatic point calculation.**
- Electronic submission is done via file sharing so there is **no limit on the size of the file** being shared.

Please note

- If you choose to print the application, make sure to **preview the print job.**
- The document is primarily set up for **landscape** printing. If the document looks askew, make sure that **landscape** is selected for the page format.
- The column title “Verified by Awards Committee” is not included in the print document, it is only pertinent to the Awards Committee.
- “Highlighting” is a generic term for emphasizing or calling out, underlines, circles, stars, etc. are acceptable means of highlighting.

CHAPTER AWARDS

Landmark Award - an award will be presented to the top highest 50% of the submitted awards in each size category.

Honors state chapters for outstanding achievements and excellence in serving their members, the industry, and the public. In each chapter size category an award will be presented to the top highest 50% of the submitted awards in each size category. The size categories are:

- Chapters with a membership of 1 to 100 members
- Chapters with a membership of 101 to 250 members
- Chapters with a membership of 251 to 500 members
- Chapters with a membership of 500+ members.

Membership numbers are based on the April Membership Report.

Pacesetter Award – an award will be presented to the top highest 50% of the submitted awards in each size category.

This award honors local association chapters for outstanding achievements and excellence in serving their members, the industry, and the public. In each chapter size category an award will be presented to the top highest 50% of the submitted awards in each size category. The size categories are:

- Chapters with a membership of 1 to 50
- Chapters with a membership of 51 to 100
- Chapters with a membership of 101 to 175
- Chapters with a membership of 176+

Membership numbers are based on the April Membership Report.

Legislative Excellence Award – a total of 4 awards may be presented each year

The Chapter Legislative Excellence Award honors state and local chapters that excel in their legislative involvement by performing outstanding service throughout the awards year. State chapters receive the award based on state chapter activity only. Local chapter points are awarded for local chapter activities only. One award may 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 75 members
- Local Chapters with 75 or less members

Membership numbers are based on the December Membership Report.

The deadline for all legislative awards is January 10th. They are submitted to the Legislative Council for review. The legislative awards are presented during Capitol Conference.

Media Relations Award – a total of 4 awards may be presented each year

The Media Relations Award honors state and local associations for outstanding media outreach efforts, achieving broadcast and press coverage and maintaining relationships with various media contacts.

- State chapter with over 250 members
- State chapter with 250 or less members
- Local chapter with over 75 members
- Local chapter with 75 or less members.

Membership numbers are based on the April Membership Report.

Robert W. Osler Professional Development Award – 2 awards are presented – 1 State/1 Local

The Osler award honors state and local chapters that demonstrate exceptional leadership by providing outstanding professional development programs on health insurance and related topics to members, associates and the general public.

State Website Award – an award will be presented to the top highest 50% of the submitted awards.

The State Website Award is presented to state chapters for outstanding web sites that serve as a resource for members, non-members and the public, and promote the value of membership. Winning chapters are provided a “NAHU Website Award Winner” seal to post on their website.

Local Website Award – an award will be presented to the top highest 50% of the submitted awards.

The Local Website Awards is presented to local chapters for outstanding web sites that serve as a resource for members, non-members and the public, and promote the value of membership. Winning chapters are provided a “NAHU Website Award Winner” seal to post on their website.

William F. Flood Public Service Award – 1 award may be presented to a State and a Local chapter

This award is presented to one state and one local chapter that excel in their involvement in public service activities.

INDIVIDUAL AWARDS

Harold R. Gordon Memorial Award – 1 award may be presented

NAHU's highest honor, the Gordon Award recognizes the health insurance industry's "Person of the Year". The Harold R. Gordon Award Committee reviews and presents this award. If you have questions about this award, send an email to awards@nahu.org.

Distinguished Service Award – an award will be presented to the top highest 50% of the submitted nominations

This award recognizes members who have contributed significantly above and beyond what is normally called for in connection with association volunteer service at the local, state and/or national level. An individual may only receive this award once in a lifetime.

Vanguard Leader Award – maximum of 4 awards may be presented

This award honors members with less than five years in the association who have contributed significantly above and beyond what is normally called for in connection with association volunteer service at the local, state, and/or national level. This award is intended for outstanding service by a new agent, a member is only eligible to win this award once. The Emerging Leader award will be presented to the top highest 50% of those submitted up to a maximum of four awards.

Legislative Achievement Award – maximum of 5 awards may be presented

This award recognizes members who are making significant contributions and performing outstanding service in connection with state legislative matters by developing and implementing methods to strengthen and improve NAHU's stance in the industry. The award is presented at Capitol Conference. **The deadline for all legislative awards is January 10th. They are submitted to the Legislative Council for review. The legislative awards are presented during Capitol Conference.**

Presidential Citation Award – unlimited number presented to those that qualify

This award is presented to state and local chapter presidents who lead their chapter to achieve a high level of excellence. This award emphasizes chapter leadership, strengthened membership and the conduct of public outreach programs. Applicants must satisfy at least twelve of 26 criteria.

Spirit of Freedom Legislative Award – 1 award may be presented

This award recognizes members who have performed outstanding service over an extended period of time and made significant contributions of time and effort in State and Federal Legislative work. The award will be presented only when a nominee of sufficient merit is found. A member can only receive this award once in a lifetime. **The deadline for all legislative awards is January 10th. They are submitted to the Legislative Council for review. The legislative awards are presented during Capitol Conference.**

William Wetzel Excellence in Public Speaking Award – 1 award may be presented

This award honors members who have demonstrated excellence in public speaking by giving presentations that educate and/or deliver important information to AHU members, industry colleagues, public officials and/or the public.

Section 8. The Application Process

RULES AND SUBMISSION GUIDELINES

1. Awards must be submitted electronically
2. 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.
3. Your submission must include the original application form/score sheet with completed point scoring, where applicable. Rekeyed or retyped applications will be disqualified. Submissions received without an application and score sheet will not be considered.
4. The decision of the Awards Committee is final.
5. No points are awarded without documentation, except as noted. (example: “verified by NAHU”)
6. Please arrange documentation by criteria numbers. Each file should be labeled with the criteria number to which it applies.
7. Documentation should be specific to the criterion.
8. Pictures are not acceptable documentation.
9. Make sure to include adequate explanations. Keep in mind the Awards Committee does not know the individual members or important regulatory and legislative persons in your state or local area.
10. Bonus points are awarded by the NAHU Awards Committee upon review of the award application, based on organization of documentation, composition, design and appearance of the submission.
11. Keep a copy of everything you submit for your own records.
12. No points are awarded in a category that does not have adequate supporting documentation.
13. Award nominations may be submitted by an individual member or chapter.
14. When no applications are received for a particular award, or award category, the award will not be given in that year.
15. When there is no award submission deserving of a particular award, the Awards Committee may determine to not give an award for that year.
16. The deadline for receipt of all award applications and all supporting materials, except the legislative awards, is **April 5** (*unless that date lands on a weekend and then the deadline is*

the immediate following Monday). The Awards Committee will not consider any application received after the deadline.

The deadline for the legislative awards and all supporting documentation is **January 10th** (unless that date lands on a weekend and then the deadline is the immediate following Monday).

17. NAHU provided “criteria lists” are posted on the NAHU website to be used as documentation for award applications. The majority of these lists are available early to mid-March. These criteria are used for anything that specifies “verified by NAHU”
18. NAHU’s electronic submission process is easy, secure and a great way to have ongoing organization of documentation without all the paper.

Questions on these lists may be directed to Awards@nahu.org.

Submitting an Electronic Awards Application

NAHU is transitioning from online award applications to electronic award application. This means that instead of uploading all of your documentation and having to worry about your documents being rejected due to size, you get to submit what you want with your application, organize it in folders and files and then share your files with NAHU, regardless of size.

What is file sharing?

File sharing is the practice of distributing or providing access to digital media, such as computer programs, multimedia (audio, images and video), documents or electronic books.

File sharing may be achieved in a number of ways. For the purpose of the awards applications NAHU has established an Awards Dropbox which is compatible with many other file sharing programs.

How does it work?

File sharing allows you to create documents and share those documents with other people. You will need to electronically compile your documentation, organize it into folders titling each section and the supporting documents as listed in the application. Load your files, along with your application to the cloud sharing program you are using and then share those folders with awards@nahu.org. NAHU receives your email that will include a link where we can download the chapter's award application and all of the supporting documentation.

NAHU uses Dropbox for the Awards Application file share program. You can use Dropbox too. The basic version is free to most users. You can find out about and download Dropbox [here](#). [YouTube](#) has videos that walk you through using Dropbox and all of its capabilities.

I can't use Dropbox

If you cannot use Dropbox for some reason, you can use whatever Document Sharing Program you prefer. Share your documents making sure that the award application is set up with the "edit" option and send to awards@nahu.org and we will retrieve your documents. "Edit" ensures that we can accurately record your points as verified by NAHU.

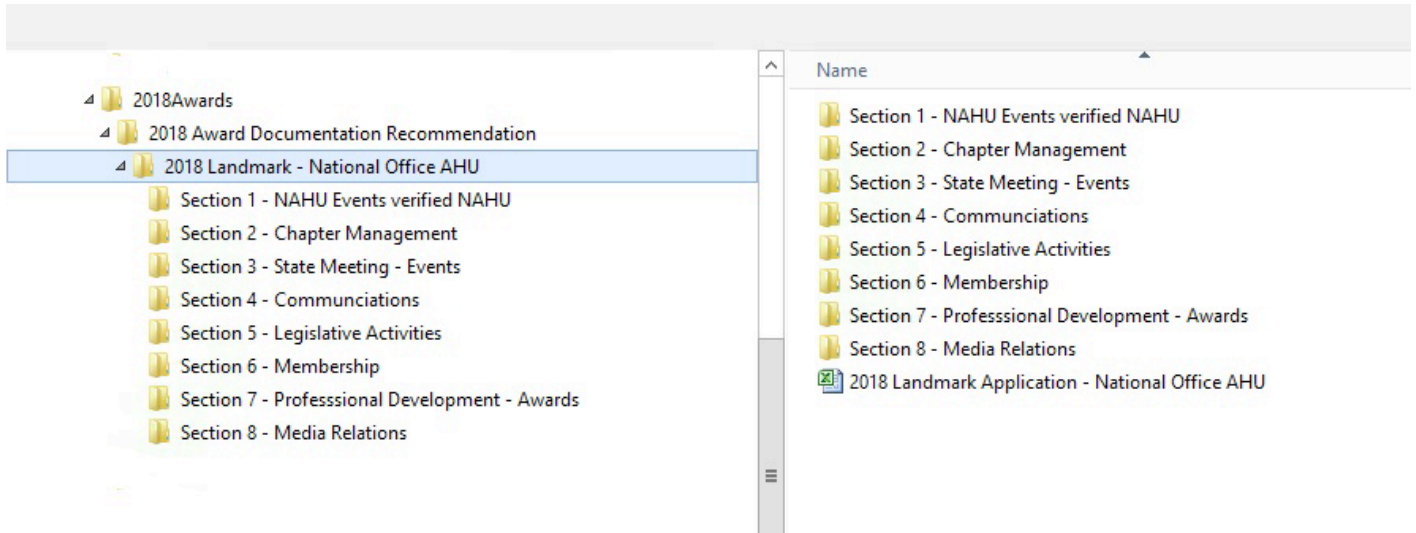
Application Organization

As important as making sure you are able to share your documents with NAHU is the ability to clearly organize and present your application. **DO NOT LOAD ALL YOUR DOCUMENTS INTO ONE FILE OR DOCUMENT** and hit send. It is very important that your submission is clearly organized to ensure the Awards Committee can find all of the documentation supporting your points. To help with the process the recommended format is below. The file sharing process allows you to better manipulate your documentation by sorting, highlighting and organizing to ensure your submission achieves maximum points. This organization also allows the Awards Committee to thoroughly and successfully review each and every submission.

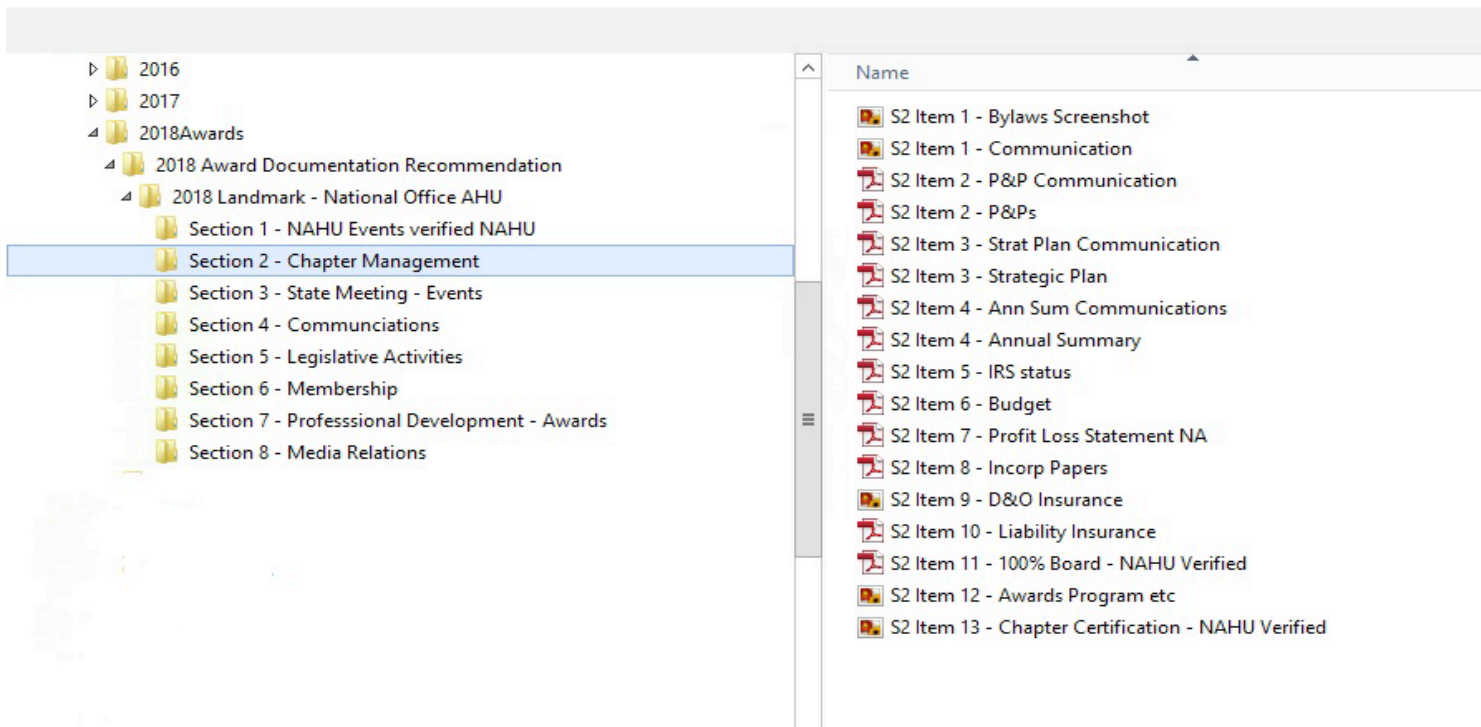
Questions: awards@nahu.org

Award Application Organization Recommendation

Folders:



Sample Section 2:



The key point to remember is to make your submission easy for the Awards Committee to review and determine that you have provided back-up documentation for all points taken.