



# TEXAS ASSOCIATION OF HEALTH UNDERWRITERS

## Chapter of the Year

(For Time Frame 1-1-09 to 12-31-09)

Chapter Name: \_\_\_\_\_

Large Chapter \_\_\_\_\_  
(201+ members)

Medium Chapter \_\_\_\_\_  
(51 - 200 members)

Small Chapter \_\_\_\_\_  
(under 50 members)

Submitted by: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

President's Name: \_\_\_\_\_

President's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ \$20 check enclosed to cover the cost of returning these awards following the annual convention. Unless otherwise noted, the submission will be returned to the President's address listed above. If this chapter has submitted more than one award application, the \$20 fee applies to the return of up to three applications to a single address. The chapter will be billed for any additional shipping cost if they are incurred.

Name and Address for returning application via UPS:

\_\_\_\_\_

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_

\_\_\_\_\_ NO. We do not wish to have our submission returned.

To be eligible, the following events must have occurred during the period of **January 1, 2009 and December 31, 2009**. (\*indicates submit documentation with this form as noted in the Awards Guidebook. No points are awarded in a category without documentation) Application and all supporting documentations must be **RECEIVED** by **February 8, 2010**. Please arrange documentation by *Application Number*. **THE POINT SCORING SECTION OF THIS APPLICATION/SCORE SHEET MUST BE COMPLETED AND SUBMITTED.**

### I. MEETINGS AND EVENTS\*

1. Holding a local Sales Symposium or Day of Education  
(must include multiple classes/speakers and provide a min of 5 CE credits) 1 x 50 pts. \_\_\_\_\_

*(Note -- Local chapters hosting either the State Symposium / convention or State Golf Tournament, will receive points in this category. Count only one meeting here, other meetings should be counted as bonus points below. Must be a special event, offering multiple CE hrs)*

2. Holding regularly scheduled local membership meeting (**Max 60 pts**) \_\_\_\_\_ x 5 pts \_\_\_\_\_
3. Holding an annual Strategic Planning meeting 1 x 25 pts. \_\_\_\_\_

4. Holding regularly scheduled local Board Meetings (**Max 60 points**) \_\_\_\_\_ x 5 pts \_\_\_\_\_

**Bonus Points for each additional sponsored meeting or event occurring during the awards period.\* (Max of 50 points)** \_\_\_\_\_ x 10 pts \_\_\_\_\_

(Meetings can only be counted here as long as they are not counted under another section. Regularly scheduled meetings or special board meetings cannot be counted here.)

**II. LEGISLATIVE ACTIVITY\***

1. Providing a legislative content meeting to membership (**Max of 50 points**) \_\_\_\_\_ x 10 pts \_\_\_\_\_  
(Can include monthly membership meetings as long as they are legislative programs and not just legislative updates).

2. Active involvement of legislative committee, including coordination with State Legislative Council 1 x 25 pts. \_\_\_\_\_  
(show participation in State workshops, leg meetings, and / or leg conference calls)

3. Regular interaction with legislators (**Max of 50 points**) \_\_\_\_\_ x 10 pts \_\_\_\_\_

4. Attendance at NAHU Cap Conference (**Max of 75 points**) \_\_\_\_\_ x 25 pts \_\_\_\_\_

5. Attendance at TAHU Day at Capitol or Leg Day (**Max of 100 points**) \_\_\_\_\_ x 10 pts \_\_\_\_\_

**III. NEWSLETTER/WEBSITE\***

1. Distribution of Local Chapter Newsletter  
Single-Page per issue (**Max of 60 points**) \_\_\_\_\_ x 5 pts \_\_\_\_\_  
Multi-Page per issue (**Max of 120 points**) \_\_\_\_\_ x 10 pts \_\_\_\_\_

2. Maintain Chapter Website 1 x 50 pts. \_\_\_\_\_

3. Current email and/or fax distribution to membership 1 x 15 pts. \_\_\_\_\_

4. Publish Chapter newsletter on website 1 x 25 pts. \_\_\_\_\_

**IV. MEDIA RELATIONS EFFORTS\***

1. Exposure of issues/ events through news media (**Max 125 points**)  
Submitted \_\_\_\_\_ x10 points \_\_\_\_\_  
Published \_\_\_\_\_ x25 points \_\_\_\_\_  
Aired \_\_\_\_\_ x25 points \_\_\_\_\_

(events should be related to local association, TAHU or NAHU issues or events and should mention the Association of Health Underwriters – the local , state or national chapter)

2. Establish and promotion of Speaker’s Bureau 1 x 15 pts. \_\_\_\_\_

3. Make presentations on TAHU/NAHU health care issues to community/civic groups  
(**Max of 50 points**) \_\_\_\_\_ x 10 pts \_\_\_\_\_

**V. MEMBERSHIP\***

- 1. Sponsoring chapter membership campaign and/or contests  
(Must show formal membership contest and promotion methods, with incentives to encourage membership recruitment.) **(Max of 75 points)** \_\_\_\_\_ x 25 pts \_\_\_\_\_
  
- 2. Net Membership gain during the award period.
  - 21% or more 1 x 100 pts. \_\_\_\_\_
  - 11% to 20% 1 x 75 pts. \_\_\_\_\_
  - 5% to 10% 1 x 50 pts. \_\_\_\_\_

**VI. PUBLIC SERVICE PROJECTS\***

- 1. Sponsoring chapter public service projects **(Max of 50 points)** \_\_\_\_\_ x 10 pts \_\_\_\_\_
  
- 2. Total dollars donated to all public service projects during the award period. **(Max of 50 points)**
  - \$1,500 + 1 x 50 pts. \_\_\_\_\_
  - \$1,000 to \$1,499 1 x 35 pts. \_\_\_\_\_
  - \$500 to \$999 1 x 25 pts. \_\_\_\_\_
  - \$100 to \$499 1 x 15 pts. \_\_\_\_\_
  
- 3. Contributions to TAHU Honorees Corporation **(Max of 50 points)**  
(Can be individual plus chapter contribution)
  - \$1,500 + 1 x 50 pts. \_\_\_\_\_
  - \$1,000 to \$1,499 1 x 35 pts. \_\_\_\_\_
  - \$500 to \$999 1 x 25 pts. \_\_\_\_\_
  - \$100 to \$499 1 x 15 pts. \_\_\_\_\_
  - \$99 and below 1 x 10 pts. \_\_\_\_\_

**VII. GRIP (Texas Leg. Fund / TAHUPAC/HUPAC)\***

- 1. Chapter Contributions to TX Leg Fund **(Max of 75 points)**  
(DO NOT count individual donations here)
  - \$1,500 + 1 x 75 pts. \_\_\_\_\_
  - \$1,000 to \$1,499 1 x 50 pts. \_\_\_\_\_
  - \$500 to \$999 1 x 25 pts. \_\_\_\_\_
  - \$100 to \$499 1 x 15 pts. \_\_\_\_\_
  
- 2. Having individual members contributing \$100 or more  
To Texas GRIP (combined contributions to Texas Leg Fund  
and TAHUPAC are counted)
  - 21% + \_\_\_ x 100 pts. \_\_\_\_\_
  - 11% to 20% \_\_\_ x 75 pts. \_\_\_\_\_
  - 5% to 10% \_\_\_ x 50 pts. \_\_\_\_\_
  
- 3. Having individual members contributing \$120 or more  
to HUPAC
  - 21% + \_\_\_ x 100 pts. \_\_\_\_\_
  - 11% to 20% \_\_\_ x 75 pts. \_\_\_\_\_
  - 5% to 10% \_\_\_ x 50 pts. \_\_\_\_\_

### VIII. EDUCATION/AWARDS\*

1. Members receiving a new industry designation during the award period (RHU, REBC, DIA, LTCP, CSA, CLTC, HIA, MHP, CLU, CEBS, CBC, CBA)  
\_\_\_\_\_ x 10 pts \_\_\_\_\_  
# of members receiving designation
  
2. Continuing Education **Hours** offered by your local chapter  
(Note -- Local chapters hosting State Symposium / convention will not receive points for CE hours or CE courses that are held at the symposium in this section because this is claimed in I1.)

30+ CE hours	1 x 50 pts.	_____
20 to 29 CE hours	1 x 35 pts.	_____
10 to 19 CE hours	1 x 25 pts.	_____
1 to 9 CE hours	1 x 15 pts.	_____
  
3. Number of CE courses sponsored by chapter

10+ courses	1 x 40 pts.	_____
5 to 9 courses	1 x 30 pts.	_____
1 to 4 courses	1 x 20 pts.	_____
  
4. Holding a local Chapter Awards Recognition Service for chapter award recipients and new designees (RHU, REBC, etc), GRIP (Texas Leg. Fund / TAHUPAC) donors and LPRT qualifiers.  
  
1 x 25 pts. \_\_\_\_\_

### IX. SPECIAL EVENT ATTENDANCE\*

1. Percentage of total member attendance at TAHU convention

up to 4.99% of membership	1 x 15 pts.	_____
5% to 9.9% of membership	1 x 25 pts.	_____
10% - 14.99% + of membership	1 x 50 pts.	_____
15% - 19.99% + of membership	1 x 75 pts.	_____
20% + of membership	1 x 100 pts.	_____

(membership numbers are based on NAHU's membership report as of 12/31)
  
2. Attendance at TAHU sponsored workshops by incoming officers, members and/or chairs (**Max of 100 points**)  
  
\_\_\_\_\_ x 10 pts \_\_\_\_\_

### X. CHAPTER MANAGEMENT\*

1. Proposed chapter budget for next fiscal year including sources of proposed revenue  
  
25 pts \_\_\_\_\_
  
2. Policies and procedures authorizing who and how members are to act on behalf of the association  
  
10 pts \_\_\_\_\_

- 3. Bylaws of local chapter 10 pts \_\_\_\_\_
- 4. Articles of incorporation or association 10 pts \_\_\_\_\_
- 5. Franchise Tax exempt letter 10 pts \_\_\_\_\_
- 6. IRS Tax exempt letter 10 pts \_\_\_\_\_
- 7. Previous 12 month's treasurer's reports\* 25 pts \_\_\_\_\_
- 8. Costs and revenues associated with a newsletter filed on a completed form 990-T 10 pts \_\_\_\_\_

**Total Points** \_\_\_\_\_

The following **BONUS POINTS** will be determined by the NAHU Awards Committee upon review of the award submission. Please do not complete this section:

Organization of documentation, design and appearance of the award submission:  
 Excellent = 50 points \_\_\_\_\_ Good = 25 points \_\_\_\_\_ Fair = 10 points \_\_\_\_\_

**TOTAL APPLICATION POINTS** \_\_\_\_\_

**Return form to:**

**Luann Yarberry**  
**1300 10<sup>th</sup> Street (zip 76301) PO Box 1071**  
**Wichita Falls, Texas 76307**

**Must be received no later than February 8, 2010**

For questions regarding completion of this form or other TAHU award matters, please contact Luann Yarberry, TAHU Awards Chair at 940-723-0771 or luanny@atmdinsurance.com.

Applications must be RECEIVED no later than the close of business on the due date regardless of method of delivery. Exceptions to the submission deadline MAY be approved with TAHU board approval.

Faxed or hand delivered submissions will NOT be accepted.

A copy of the submission form must accompany all submissions with points/narrative written on the submission form. Submission form should NOT be changed, retyped or reformatted. If additional space is needed, extra sheets should be attached and numbered to correspond to submission form. Packets received without applications forms/score sheets will not be considered.

*Awards Committee use only:*

Date: \_\_\_\_\_ Reviewed by \_\_\_\_\_  
 (Initials) (Initials) (Initials)