



Association Achievement Award 2010-2011

The Association Achievement Award recognizes excellence in performance by local associations on all levels of achievement. Its purpose is to develop leadership and promote interaction among local associations.

It is a non-competitive award in that all local associations that achieve standards of excellence will be recognized. Each local is encouraged to be recognized by attaining the levels of achievement specified.

Association Achievement Award

Winning Criteria

The Local Association Recognition Task Force will meet by conference call and judge all applications submitted according to instructions and recommend to the NAIFA-California President the local associations that deserve one of three awards.

The NAIFA-California President will present Gold, Silver or Bronze Association Achievement Awards at the NAIFA-California Annual Convention based on the following criteria:

Member Benefits	27 Points Possible	Gold Award	103+ Points
Advocacy	25 Points Possible	Silver Award	93-102 Points
Membership	26 Points Possible	Bronze Award	85-92 Points
Governance	21 Points Possible		
Bonus Section	18 Points Possible		
TOTAL	117 Points Possible		

Instructions

- The Award year is **April 1, 2010 through March 31, 2011.** **Application submission deadline is April 15, 2011.**
 - Submit completed application with required supporting documents to NAIFA-California.
 - Applications must be **received** at NAIFA-California **no later than April 15th, postmarks will not be accepted.** We recommend you use a form of mail that can be tracked, such as priority mail with return receipt or an overnight delivery service such as UPS or FedEx.
 - The application must be typed, legibly printed or submitted in an electronic format.
- Only the application and required supporting documents should be submitted on stationery no larger than 8 1/2" by 11". **Submissions provided in binder format will not be accepted.**
 - Supporting documents are required for several questions in order for points to be awarded, such are noted with an asterisk (*). **Lack of supporting documents where requested will result in no points awarded.**
 - Please label all supporting documents with the local association name, the section and question number. For EXAMPLE, the strategic plan submitted under Governance should be labeled "D. Governance - 5". **Documentation not properly labeled may not be reviewed.**
- All **IFAPAC contribution information is for the 2010 calendar year**, therefore all IFAPAC activities (including contributions, counting toward participation and dollar amount goals) must be **received** at NAIFA National by **December 31, 2010.**
- Answers and supporting material is subject to verification by NAIFA and NAIFA-California records.
- Application requires signature of your Local Association President.
- Please DO NOT score your application.**

Association & Verification Information

I have reviewed all labeled supporting documents and find the information provided in this application is accurate and complete to the best of my knowledge.

LOCAL ASSOCIATION

DATE COMPLETED

PRESIDENTS NAME

SIGNATURE

Return completed application with labeled supporting documents to
NAIFA-California, 1451 River Park Drive, Suite 175, Sacramento, CA 95815-4520

A. Member Benefits Programs & Professional Development

27 Maximum Points Possible

- What was your highest percentage for attendance (includes Prospects and all NAIFA Members) at a general membership meeting?
 *Submit roster indicating date & who attended the meeting.
 Formula: Meeting attendance number divided by June 30, 2010 Year-End membership number = %
 41% + (4 pts) 31-40% (3 pts) 21-30% (2 pts) 10-20% (1 pt)
- Did all of your local association meetings or events provide a Sales Idea or Practice Management Strategy?
 *Submit a brief description Yes No
- Did your local association use NAIFA's Table Topics or equivalent program for one or more meeting(s) this year? * Submit announcement information
 1 Meeting = 2 points 2 or more Meetings = 4 points
- Other than regular meetings, did your local association provide a venue to increase networking opportunities for your members? * Submit description
 EXAMPLE: using the Member Involvement Process (MIP), creating a Young Advisors Team (YAT) or arranging mentoring opportunities
 Yes No
- Did your local association provide "Practice Specialty" programs of interest for members in any of the areas below? * Submit date and title of each program
 Life, Disability Insurance, Long Term Care and Annuities
 Health & Employee Benefits
 Multiline, P & C
 Financial Advising & Investments
- Did your local association provide LUTC, FSS or CE classes?
 2 or more Classes = 3 points 1 Class = 2 points
 *Submit dates and announcement information
- Does your local association maintain an active and current website or a newsletter for your members benefit? *Attach a copy of the Newsletter OR Website address _____
 Yes No
- Did your local association hold a Sales Congress, Forum, Special Guest Panel, or MDRT Day? *Submit date and program agenda

Number of Members as of March 31 st _____ Committee enters # from NAIFA-CA March 31 st Membership Report	
DO NOT SCORE	
For Committee Use Only	Points Awarded
41+% = 4 points 31-40% = 3 points 21-30% = 2 points 10-20% = 1 point	
5 points	
2 Mtgs. = 4 points 1 Mtg. = 2 points	
2 points	
4 areas = 5 points 3 areas = 4 points	
2 Classes = 3 points 1 Class = 2 points	
2 points	
2 points	

B. Advocacy

25 Maximum Points Possible

- List your APIC "Key Contacts" for each of your assigned representatives.
 *Submit three lists of local legislators' names with your local member name (APIC key contact) beside the legislator, for each of the three Legislative groups below
 State Senators (3 pts) State Assembly Members (3 pts)
 Members of Congress (3 pts)
- Did local members attend the "Day On The Hill, May 19, 2010"?
 * Submit attendee list Yes No
- Other than "Day On the Hill", did your local Government Relations Committee meet with Legislators or did Legislators speak at a general meeting or legislative breakfast? * Submit details
 Yes No
- California IFAPAC contributions: CA Award Year is the calendar year January 1 - December 31, 2010 (Same as NAIFA National).
 To be verified by NAIFA-California staff
 \$65 per capita \$45 per capita
 \$55 per capita \$35 per capita
- Did **all** of your Board of Director members contribute to IFAPAC at the following levels? * Submit list with name and level of contribution
 Ambassador level or above (\$200 per Year)
 Century Club level or above (\$100 per Year)

DO NOT SCORE	
For Committee Use Only	Points Awarded
9 points 3 points possible for each legislative group	
2 points Maximum One Per Attendee	
2 or More Mtgs. = 3 points 1 Mtg. = 2 points	
\$65 pc = 4 points \$55 pc = 3 points \$45 pc = 2 points \$35 pc = 1 point	
Ambassador = 3 points Century Club = 2 points	

B. Advocacy continued

- 6. Did 25% of your local association members contribute to IFAPAC at the "Investor" level or above? (\$50 per Year) Yes No
- 7. Did your local association hold one or more meetings or events dedicated to IFAPAC that included a direct appeal for IFAPAC contributions?
*Submit date(s) and announcement information Yes No

DO NOT SCORE	
For Committee Use Only	Points Awarded
2 points	
2 points	

C. Membership

26 Maximum Points Possible

- 1. Membership Increase:
Percentages are based on the March 31, 2010 Award Report vs. March 31, 2011 Report
 - A. 10% + over last year's membership total new & renewals = 3 points
 - B. 90% of renewals = 3 points
 85% of renewals = 2 points
 80% of renewals = 1 point
 - C. 10% growth of new members = 3 points
 5% growth of new members = 2 points
 Increase of 1 new member = 1 point
- 2. To increase NEW members, what three (3) different methods have you organized? * Submit documentation and results
EXAMPLE: use of CA Producer Licensing List, Agency Presentation, Prospective Member Orientation or any method used not listed here
- 3. To encourage RENEWALS, what three (3) different methods have you organized? * Submit documentation and results
EXAMPLE: Phone-A-Thon, NAIFA Lapsed Lists, Mass Mailings, or any method used not listed here
- 4. Did your local association participate in the two National Membership Months?
October 2010 Yes No March 2011 Yes No
*Submit copy of e-mail report sent to NAIFA-California which includes dates, how many calls, contacts and results.
- 5. Did your local association formally implement "The Seven Touches" Retention Program? * Submit samples and documentation, including member name, join date, touch dates and contact. Documentation for Touch 7 should include names of members who joined the previous year, since Touch 7 is six weeks before a member renews.
 Touch 5 Touch 6 Touch 7
- 6. Did your local association use "Member Net" * Submit a page from the Member Net Report representing Sept 2010, Nov 2010, Jan 2011 and Mar 2011
- 7. Did your local association put together a specific Membership Strategic Plan? * Submit a copy of the Membership Plan
- 8. Does your local association have a membership committee?
* Submit a Committee member list
- 9. Did your local association establish a "Buddy" System by assigning a "Buddy" to every new member? * Submit a list of new member names and their "Buddy" name with e-mail addresses
- 10. Does your local association offer a New Member Orientation, which covers the NAIFA Guidebook and includes the Code of Ethics, during the award year April 1, 2010 – March 31, 2011? * Submit full detailed description of event

DO NOT SCORE	
For Committee Use Only	Points Awarded
1A. 3 points	
1B. 90% = 3 points 85% = 2 points 80% = 1 point	
1C. 10% = 3 points 5% = 2 points + 1 New Mem = 1 point	
2 points	
2 points	
2 points One per event	
3 points One per Touch	
2 points	
2 points	
1 point	
2 points	
1 point	

D. Governance

21 Maximum Points Possible

- Who attended the state in person "Leadership Conference" training?
 *List names below
 Governance (ALC, July 2010) _____ Membership (ALC, July 2010) _____
President, National Committeeperson, Association Executive (3 Expected) *Membership Chair & Committee (1 Expected)*

 Professional Development/Programs (Webinar, July 2010)
Program Chair & Committee (1 Expected)

- Did your local association hold a local strategic planning session?
 *Submit attendee list Yes No
 Date of Meeting _____
 Facilitator _____
- Did your local association reach at least 75% of its goals from your Strategic Plan between July 1st through March 31st? * Submit copy of strategic plan with completed items noted
 Yes No
- Is your local association actively involved in a Leadership Development program? * Submit description and participants
EXAMPLE: A plan to recruit new leaders, programs to enhance leadership skills, mentoring
 Yes No
- Do you have a two-year leadership development plan in place? What is the line of succession of officers and chairs for the next two years?
 *Submit list of names by year and position (PE, Sec. or VP)
 Yes No
- Did your local association provide Board orientation for your local leaders, in addition to the Local Strategic Planning meeting?
 *Submit date and outline of the program Yes No

DO NOT SCORE	
For Committee Use Only	Points Awarded
10 points Maximum 2 points per person (5 Attendees Expected)	
3 points	
2 points	
2 points	
2 points for 2 years	
2 points	

E. Bonus Section

18 Maximum Points Possible

- Did your local association President or National Committeeperson or their designated voting alternates to attend the annual NAIFA Annual Meeting and Career Conference?
 *Provide names below Yes No
 President or Alternate _____
 National Committeeperson or Alternate _____
- Did your local association President or National Committeeperson or their designated voting alternates attend the 2010 NAIFA-California Annual Meeting & Sales Expo? *Provide names below Yes No
 President or Alternate _____
 National Committeeperson or Alternate _____
- Did you ask for formal feedback from your members?
 *Submit questionnaire with summary of results
EXAMPLE: speaker evaluation form or survey of interests
 Yes No
- Did your local association hold one or more Community Service Project(s)? *Submit a brief description
- Did your local association contribute to the Paul R. Jeffers Prospector Fund this award year? *Date of Contribution _____
 * Amount of Contribution _____

DO NOT SCORE	
For Committee Use Only	Points Awarded
2 points One point per attendee	
2 points One point per attendee	
1 point	
1 point	
1 point	

E. Bonus Section continued

6. Did your local association participate in Life Insurance Awareness Month (LIAM) September 2010? *Submit a brief description of the activities
7. Did **ANY** of your local association members contribute to IFAPAC at:
* Submit list with name and level of contribution
 Diplomat level or above (\$1,000 per Year) = 2 points
 Envoy level or above (\$500 per Year) = 1 point
8. Is your local association actively involved in the Leadership In Life Institute (LILI) program? * Submit list of participants
 Current LILI Student (2011 Class) = 2 points
 LILI Application submitted for 2011 Class = 1 point
9. Did your Local Association conduct a financial review or audit of your financial records * Submit a copy of the audit or review report
10. Did your local association follow the recommended PowerPoint presentation from the state association for your Strategic Planning Meeting? Yes No
11. Did 75 percent of your incoming Board attend the Strategic Planning Meeting?
12. Describe a "special event" or a meeting that offers a member benefit or assists your local in any way to uniquely promote NAIFA. * The "special event" or meeting should be creative and unique. You cannot use any supporting documents or descriptions that you may have already used for a previous question.
*Submit details of event, including flyers, agendas, etc.
(Judges discretion will be utilized.)

DO NOT SCORE	
For Committee Use Only	Points Awarded
1 point	
Diplomat = 2 points Envoy = 1 point 2 points Maximum	
LILI Student = 2 points LILI Application = 1 point	
2 points	
1 point	
1 point	
2 points	

Applications with all labeled supporting documents must be received at NAIFA-California no later than April 15, 2011

NO POSTMARKS WILL BE ACCEPTED

Return completed application with all labeled supporting documents to:



National Association of
Insurance and Financial Advisors
California
1451 River Park Dr. Suite 175
Sacramento, CA 95815-4520
(916) 646-8600
Fax (916) 646-8130
office@naifacalifornia.org
www.naifacalifornia.org

FOR COMMITTEE USE ONLY	
DO NOT SCORE	Points Awarded
Member Benefits	
Advocacy	
Membership	
Governance	
Bonus Section	
Total	