

Association Achievement Award 2011-2012

Online Application

All Applications will be submitted and accepted online Only!

Instructions

1. The Award year is April 1, 2011 through March 31, 2012.
Application submission deadline is **April 13, 2012, by 11:00 pm PST**
 - ▲ Submit completed application online with required supporting documents to NAIFA-California.
 - ▲ Applications must be **received online** at NAIFA-California **no later than April 13th**, 11:00 pm PST.
 - ▲ The application must be submitted in an **electronic format**.
2. **Online Submissions and Supporting Documents**
 - ▲ Supporting documents are required for several questions in order for points to be awarded, such are noted with an asterisk (*) and upload file. **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.**
3. All **IFAPAC contribution information is for the 2011 calendar year**, therefore all IFAPAC activities (including contributions, counting toward participation and dollar amount goals) must be **received** at NAIFA National by **December 31, 2011**.
4. Answers and supporting material is subject to verification by NAIFA and NAIFA-California records.
5. Application requires signature of your Local Association President, electronic signatures acceptable.
6. 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

Winning Criteria

Member Benefits	22 Points Possible	Gold Award	95+ Points
Advocacy	28 Points Possible	Silver Award	85-94 Points
Membership	20 Points Possible	Bronze Award	77-84 Points
Governance	23 Points Possible		
Bonus Section	14 Points Possible		
TOTAL	107 Points Possible		

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Member Benefits

1. What was your highest percentage for attendance (includes Prospects and all NAIFA Members) at a general membership meeting?
***Submit a roster indicating date & who attended the meeting. UPLOAD FILE**
Formula: Meeting attendance number divided by June 30, 2011 Year-End membership number = %
 41% + (4 pts) 31-40% (3 pts) 21-30% (2 pts) 10-20% (1 pt)
2. Did your local association use NAIFA's Table Topics or equivalent program for one or more meeting(s) this year? *** Submit announcement/flyer information UPLOAD FILE**
 1 Meeting = 2 points 2 or more Meetings = 4 points
3. Other than regular meetings, did your local association provide a venue to increase networking opportunities for your members? *** Submit a brief description**
EXAMPLE: creating a Young Advisors Team (YAT) or arranging mentoring opportunities
 Yes No
4. Did your local association provide "Practice Specialty" programs keying on transferable sales ideas of interest for members in any of the areas below? *** Submit date and a meeting flyer/announcement for each program**
 Life, Disability Insurance, Long Term Care and Annuities Date **UPLOAD FILE**
 Health & Employee Benefits Date **UPLOAD FILE**
 Multiline, P & C Date **UPLOAD FILE**
 Financial Advising & Investments Date **UPLOAD FILE**
5. 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**
1. Date Brief Description of Event **UPLOAD FILE** - Announcement
2. Date Brief Description of Event **UPLOAD FILE** - Announcement
6. Does your local association maintain an active and current website for your members benefit?
Fill in - Website address _____ 2 points
7. Did your local association hold a Sales Congress, an Advisor Forum, a Special Guest Panel, a MDRT Day or a joint meeting with an allied professional organization? ***Submit date and program flyer/announcement. UPLOAD FILE** 2 points
8. 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 UPLOAD FILE** 2 points
- TOTAL 22 points**

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Advocacy

1. List your APIC "Key Contacts" for each of your assigned representatives. ***Submit Name of Legislator and the Local key contact Member Name (APIC key contact) , for each of the three Legislative groups below**
- Locals to provide Legislative Lists applicable to their local areas
- State Senators (3 pts)
- Legislator Name Key Contact Name
Legislator Name Key Contact Name
Legislator Name Key Contact Name
- State Assembly Members (3 pts)
- Legislator Name Key Contact Name
Legislator Name Key Contact Name
Legislator Name Key Contact Name
- Members of Congress (3 pts)
- Legislator Name Key Contact Name
Legislator Name Key Contact Name
Legislator Name Key Contact Name
2. Does your local Association have an IFAPAC Chair and an APIC Chair?
- IFAPAC Chair: Insert Name APIC Chair: Insert Name
3. Did your local Government Relations Committee meet with your Local Legislators or did any Legislators speak at a general meeting or legislative breakfast? *** Submit**
1. Date _____ Legislator's Name _____ Brief Description of Event _____
2. Date _____ Legislator's Name _____ Brief Description of Event _____
4. California IFAPAC contributions: CA Award Year is the calendar year January 1 – December 31, 2011 (*Same as NAIFA National per capita found on 12/31/11 Local Statistical PAC Report*)
To be verified by NAIFA-California staff
- \$65 per capita (4 points) \$45 per capita (2 points)
 \$55 per capita (3 points) \$35 per capita (1 point)
5. Did **all** of your Board of Director members contribute to IFAPAC at the following levels? *****
Submit list with name and level of contribution UPLOAD FILE
- Ambassador level or above (\$200 per Year)
 Century Club level or above (\$100-\$199 per Year)
 Investor Club level or above (\$50- \$99 per Year)
6. What percentage of your local association members contribute to IFAPAC
(*Percentage reported on the Local Statistical IFAPAC Report as of 12/31/11*)
- 40% 35% 30%
7. Did your local association hold a fundraising event to raise money for IFAPAC that included a direct appeal for IFAPAC contributions? (Mailing, dedicated meeting, event, raffles)
***Submit date(s) and attach the promotion piece for the event.**
- Date _____ Brief Description of Event _____ **UPLOAD FILE**
8. Did your local association send three written communications to its members dedicated to IFAPAC? **Attach copies of each communication**
- UPLOAD FILE 1 UPLOAD FILE 2 UPLOAD FILE 3**

9 points
3 points possible
for each
legislative
group

2 points Maximum
One Per Chair

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 points

Ambassador
= 3 points
Century Club
= 2 points
Investor Club
= 1 points

40% = 3 points
35% = 2 points
30% = 1 points

2 points

2 points

TOTAL 28 points

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Membership

- | | |
|---|--|
| <p>1. Did your local association increase your membership by one or more?
 is based on the March 31, 2011 Award Report vs. March 31, 2012 Report
 Membership Total as of March 31, 2011 Membership Total as of March 31, 2012</p> | <p>7 points</p> |
| <p>2. Was a membership presentation made at a venue that had non-members in attendance
 (Agency presentation, LUTC, or FSS class, etc.)?
 <u>Submit Date</u> <u>Presenter's Name</u> <u>Event Details</u></p> | <p>2 points</p> |
| <p>3. Did your local association participate in the two National Membership Months?
 October 2011 <input type="checkbox"/> Yes <input type="checkbox"/> No March 2012 <input type="checkbox"/> Yes <input type="checkbox"/> No
 *Submit summary of activities which includes dates, how many calls, contacts and results.
 <u>Date</u> <u>How Many Calls</u> <u>Contacts</u> <u>Calls Made By</u> <u>Results</u></p> | <p>4 points
Two per event</p> |
| <p>4. Did your local association formally implement "The Seven Touches" Retention Program? *
 <input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <p>1 point</p> |
| <p>5. Did your local association use "Member Net"
 * Submit a page from the Member Net Report representing Sept 2011, Nov 2011, Jan 2012 and Mar 2012, showing activity by a Local Association Member. (Not by NAIFA paid Staff)
 Sept 2011 UPLOAD FILE Nov 2011 UPLOAD FILE
 Jan 2012 UPLOAD FILE Mar 2012 UPLOAD FILE</p> | <p>4 points
One point per Month</p> |
| <p>6.. Did your local association put together a specific Membership Strategic Plan?* Submit a copy of the Membership Plan UPLOAD FILE</p> | <p>2 points</p> |
| <p>7. 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, 2011 – March 31, 2012? * Submit full detailed description of event</p> | <p>1 point</p> |
| <p>TOTAL 20 points</p> | |

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Governance

1. Who attended the state in person "Leadership Conference" training?
***List names below**
- 10 points
Maximum
- Governance (ALC, July 2011)
President, President-Elect, National Committeeperson, Association Executive Invited
- Name _____ Title _____
- Name _____ Title _____
- Name _____ Title _____
- Membership (ALC, July 2011)
Membership Chair & Committee Invited
- Name _____ Title _____
- Professional Development/Programs (Webinar, June 22, 2011)
Program Chair & Committee Invited (Maximum 2 points)
- Name _____ Title _____
- 2 points per person**
2. Did your local association hold a local strategic planning session?
Date of Meeting _____
Facilitator _____
- 3 points
3. Did 75 percent of your incoming Board attend the Strategic Planning Meeting?
***Submit attendee list UPLOAD FILE**
4. Did your local association reach at least 75% of its goals from your Strategic Plan from July 1st through March 31st? *** Submit copy of strategic plan with completed items noted UPLOAD FILE**
- 2 points
5. Is your local association actively involved in a board Leadership Development program excluding LILI? *** Submit description and participants**
EXAMPLE: *A plan to recruit new leaders, programs to enhance leadership skills, mentoring*
- 2 points
6. 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)**
- Year _____ Year _____
- Name _____ President Name _____ President
- Name _____ President-Elect Name _____ President-Elect
- Name _____ National Committeeperson Name _____ National Committeeperson
- Name _____ Secretary Name _____ Secretary
- Name _____ Vice President Name _____ Vice President
- 2 points
for 2 years
7. 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 UPLOAD FILE
- 2 points
8. Did your local association provide recognition for one of these groups of member: long time members, those receiving the Managers Membership and Industry Awards, and any new designations?
- Date _____ **Submit Announcement UPLOAD FILE**
- 1 point

TOTAL 23 points

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Bonus Section

- | | |
|---|---|
| <p>1. Did your local association President or National Committeeperson or their designated voting alternates attend the 2011 NAIFA-California Annual Meeting & Sales Expo?
*Provide names below</p> <p>President
or Alternate _____</p> <p>National Committeeperson
or Alternate _____</p> | <p>2 points
Maximum</p> <p>One point per
attendee</p> |
| <p>2. Did your local association President or National Committeeperson or their designated voting alternates attend the 2011 annual NAIFA Annual Meeting and Career Conference?
*Provide names below</p> <p>President
or Alternate _____</p> <p>National Committeeperson
or Alternate _____</p> | <p>2 points
Maximum</p> <p>One point per
attendee</p> |
| <p>3. Did your local association hold one or more Community Service Project(s)?* Submit a brief description</p> | <p>1 point</p> |
| <p>4. Did your local association receive any media coverage? (DIAM, LIAM, Radio, Local/State Newspaper, Television) *Submit a brief description and a sample UPLOAD FILE</p> | <p>1 point</p> |
| <p>5. Did ANY of your local association members contribute to IFAPAC at:
* Submit list with name and level of contribution</p> <p><input type="checkbox"/> Diplomat level or above (\$1,000 per Year) = 2 points
<input type="checkbox"/> Envoy level or above (\$500 per Year) = 1 point</p> <p>Name _____ Level _____</p> | <p>Diplomat = 2 points
Envoy = 1 point
2 points Maximum</p> |
| <p>6. Is your local association actively involved in the Leadership In Life Institute (LILI) program? *
Submit list of participants</p> <p><input type="checkbox"/> Current LILI Student (2012 Class) = 2 points
<input type="checkbox"/> LILI Application submitted for 2012 Class = 1 point</p> <p>Name _____</p> | <p>LILI Student =
2 points
LILI Application =
1 point
2 points Maximum</p> |
| <p>7. Did your Local Association conduct a financial review or audit of your financial records *
Submit a copy of the cover letter for an audit or a review report UPLOAD FILE</p> | <p>2 points</p> |
| <p>8. 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.)</p> <p>Date _____</p> <p>Description of Event _____</p> <p>Attach Announcement/Flyers/Agenda UPLOAD FILE</p> | <p>2 points</p> |
| <p>TOTAL 14 points</p> | |