

**REGION VIII**  
**NATIONAL ASSOCIATION OF INSURANCE**  
**WOMEN**  
**(International)**

**AWARDS FUND PROCEDURES MANUAL**

**REVISED**  
**April 5, 2008**

NATIONAL ASSOCIATION OF INSURANCE WOMEN, Intl.  
AWARDS FUND PROCEDURE MANUAL  
**\*\*ALL AWARDS ARE FOR THE NAIW FISCAL YEAR 7/01 - 6/30  
OF THE RESPECTIVE AWARD YEAR**

**SECTION 1. AWARDS**

**A. REGION VIII MEMBER OF THE YEAR AWARD**

Purpose: To give recognition to an individual who has shown outstanding personal achievement, leadership abilities and dedication to the local association, State Council, Region VIII and NAIW, which surpasses the accomplishments of other members of the region.

1. The current Member of the Year recipient shall be the chairman of this award committee and shall appoint three (3) NAIW members outside of Region VIII to judge the entries.
2. The Regional Awards Committee Chairman shall send notification to all local associations to submit their essay entry for one (1) nominee, who must show the submitting association as their association of record with NAIW. The notification letter must be sent out prior to December 1 and contain the name, address and telephone number of the Member of the Year Chairman. All entries are to be returned directly to this chairman not later than February 1. The Member of the Year Award Chairman shall coordinate and forward entries to the selected judges.
3. Any member of the region whose association of record is in Region VIII\*\* is eligible as a nominee for this award, with the exception of the presiding Regional Vice President and any previous Member of the Year Award recipient.
4. Each entry shall consist of:
  - A. An essay of not more than 1,000 words, which addresses the nominee's qualifications as stated in the award's purpose.  
\*\*The entry must be signed by the submitting association's president.
  - B. A detailed resume which includes, but is not limited to, the categories listed in the point system. The committee shall assign the points to each entry based on the criteria and point system shown in item 8 of this section.
5. The Award Committee may also consider entries from the prior year, as long as the nominee's membership status and association affiliation is unchanged.
6. If in the collective judgment of the committee none of the submissions have met the point system criteria or reflect the purpose or the spirit of the award, no award shall be given.
7. The Award shall be presented at the Regional Conference.
8. The points shall be based on:

<u>State, Regional and National Level:</u>	<u>Point Value</u>
Committee Chairmanships held	3 points each
State Meetings, Conferences and Conventions Attended	2 points each
General Participation	3 points (max.)

Local Association Level:

Officer or Director positions held	4 points each
Chairmanships held	1 point each
General Participation	4 points (max.)
Attendance	2 points (max.)

\*\* Amended 3/03

Education:

Insurance education courses, classes, seminars and institutes attended.	1 point each (10 pt max.)
CPIW/CPIW designation	2 points
Other insurance designations, i.e., CPCU, CIC, CLU, ARM, AAI, AIS, AAU, etc.	1 point each
MINIMUM points required for eligibility:	23 Points

**REGION VIII MEMBER OF THE YEAR AWARD**  
**SCORING SHEET**

**Judge's Name:** \_\_\_\_\_

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Association:** \_\_\_\_\_

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**LEADERSHIP**

This section describes the candidate's Leadership Role in all levels of NAIW. Points are awarded for Chairmanship held at the State, Regional, and National Level; attendance at State Meetings, Regional Conferences, National Conventions; and General Participation at the State, Regional and National Level.

**SCORE** \_\_\_\_\_

**LOCAL ASSOCIATION**

This section the candidate involvement and dedication to the local association by accepting various positions, chairing committees and attending meetings.

**SCORE** \_\_\_\_\_

**EDUCATION**

This section shows the candidate's awareness of one of NAIW's main focuses – Education - and their pursuit of continuing education. Points are awarded for NAIW courses, insurance education courses, classes, seminars and institutes taken as well as for designations earned.

**SCORE** \_\_\_\_\_

**ESSAY**

Essay not to exceed 1,000 words (must be typed, double spaced), which addresses the nominee's qualifications and addresses the individuals outstanding personal achievement, leadership abilities and dedication to the local association, State Council, Region.

(This score is a subjective score by the judge – maximum of 25 points)

**SCORE** \_\_\_\_\_

**TOTAL SCORE**

**SCORE** \_\_\_\_\_

**B. REGION VIII HALL OF FAME AWARD:**

Purpose: To recognize and demonstrate Region VIII's appreciation to members who, during their lifetime, have given their time and dedication to the development of their local association, State Council, Region VIII and NAIW.

1. The current Hall of Fame Award recipient shall be the chairman of this award committee together with two (2) members of the Regional Awards Committee, which she selects.
2. The Regional Awards Committee Chairman shall send notification to all local associations to submit their essay entry for one (1) nominee, who must show the submitting association as their association of record with NAIW. The notification letter must be sent out prior to December 1 and contain the name, address and telephone number of the Hall of Fame Award Chairman. All entries are to be returned directly to that chairman not later than February 1. The Hall of Fame Award Chairman shall coordinate and forward entries to the selected committee members.
3. Any member of the region whose association of record is in Region VIII\*\* and who meets the eligibility requirement, as stated in item 8 of this section, is eligible as a nominee for this award, with the exception of the presiding Regional Vice President and any previous Hall of Fame Award recipient.
4. Each entry shall consist of:
  - A. An essay of not more than 1,000 words, which addresses the nominee's qualifications as stated in the award's purpose.  
\*\*The entry must be signed by the submitting association's president.
  - B. A detailed resume which includes, but is not limited to, the categories listed in the point system. The committee shall assign the points to each entry based on the criteria and point system shown in items 8 and 9 of this section.
5. The Hall of Fame Award Committee may consider entries from the prior year, as long as the nominee's membership status and association affiliation is unchanged.
6. If in the collective judgment of the committee none of the submissions have met the point system criteria or reflect the purpose or the spirit of the award, no award shall be given.
7. The Award shall be presented at the Regional Conference.
8. Eligibility Requirements:
  - A. Sixty (60) years of age or over.
  - B. A minimum of ten (10) years in NAIW.
  - C. A minimum of fifteen (15) years insurance experience.
  - D. Significant contributions to the association and to the insurance industry.

\*\* Amended 3/03

- |                                       |                    |
|---------------------------------------|--------------------|
| 9. The points shall be based on:      | <u>Point Value</u> |
| National Officer positions held       | 2 points each      |
| Regional Officer positions held       | 3 points each      |
| National Committee Chairmanships held | 2 points each      |

Regional Committee Chairmanships held	3 points each
Local Officer positions held	1 point ea.term
Local Committee Chairmanships held	1 point each
Attendance at State Council Meetings	1 point each
Attendance at Regional Conferences	1 point each
Attendance at National Conventions	1 point each
MINIMUM points required for eligibility	15 Points

**REGION VIII HALL OF FAME AWARD**  
**SCORING SHEET**

Judge's Name \_\_\_\_\_

Candidate \_\_\_\_\_

Date \_\_\_\_\_ MAL \_\_\_\_\_ or Association \_\_\_\_\_

# of Years in NAIW \_\_\_\_\_ # of years Insurance Experience \_\_\_\_\_

Current Age \_\_\_\_\_

**NAIW Positions Held**

National Officer positions held \_\_\_\_\_

Regional Officer positions held \_\_\_\_\_

National Committee Chairmanships held \_\_\_\_\_

Regional Committee Chairmanships held \_\_\_\_\_

Local Officer positions held \_\_\_\_\_

Local Committee Chairmanships held \_\_\_\_\_

Attendance at State Council Meetings \_\_\_\_\_

Attendance at Regional Conferences \_\_\_\_\_

Attendance at National Conventions \_\_\_\_\_

**SCORE** \_\_\_\_\_

**ESSAY**

Essay not to exceed 1,000 words (must be typed, double spaced), which addresses the nominee's qualifications and addresses the individuals lifetime of dedication to the development of their local association, State Council, Region VIII and NAIW.

(This score is a subjective score by the judge – maximum of 25 points)

**SCORE** \_\_\_\_\_

**TOTAL SCORE** \_\_\_\_\_

**C. JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION:**

1. The Regional Awards Committee Chairman shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and addresses of the three (3) committee members that will judge the entries. The local association shall return one set of the completed entry, essay and all required documentation to the chairman and each of the committee members listed, not later than February 1.
2. Each entry shall consist of:
  - a. An essay of not more than 1,000 words with particular emphasis on the criteria listed in this section.
  - b. Entry must be signed by the association president.
3. The committee shall assign the points to each entry based on the criteria/point system in item 6 of this section. A plaque, medallion or other memento will be presented to the winning association.
4. The Award shall be presented at the Regional Conference.

5. The points shall be based on:	<u>Point Value</u>
1. Formal insurance courses* sponsored or co-sponsored by the association.**	30 points each
2. Workshop/class*, seminar* or institute course* sponsored or co-sponsored by the association.**	20 points each
3. NAIW educational courses*, seminars* or classes* sponsored or co-sponsored by the association (i.e., How to be a Best Seller; Leadership Development; Managing your Career; Rules of the Road; Negotiating Skills or any other major NAIW educational program made available to local associations).**	15 points each
4. Members who instructed workshops/classes* or seminars for the association or other industry organization (i.e., CIC, CPCU, CLU, IIA, IIAA, PIA, etc.). Points apply to each workshop/class or seminar.**	5 points each
5. Members who instructed courses* or institute course* for the association or other industry organization (see above). Points apply to each course or institute course.**	10 points each
6. Education related articles written by an association member and published in the association's bulletin or other industry publication. Does not include committee reports or notices in bulletins.**	10 points each

7. Professional designations held by members of the association (i.e., CIC, CPCU, CLU, ARM, AAI, AIS, etc.) 5 points for each member holding a designation.	5 pts max/member
8. Member attendance at insurance related workshop/class, courses, seminar or institute. 1 point for each one attended per member with a maximum of 5 points per member.**	5 pts max/member
MINIMUM points required for eligibility	100

NOTE:

**\* Definitions**

A COURSE is considered to be a multi-week continuous series (9-15 weeks), i.e., IIA, ARM, CPCU, CLU.

A SEMINAR or INSTITUTE is a 1 to 3 day continuous program, i.e., CIC or similar programs)

A WORKSHOP/CLASS is a 1/2 to 1 day program.

\*\*Documentation is required and must accompany the entry, otherwise points will not be given.

**ENTRY FORM**

**JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION**

ASSOCIATION: \_\_\_\_\_

# OF MEMBERS AS OF 6/30/\_\_\_\_\_  
(must agree with NAIW membership records)

Education Chairman: \_\_\_\_\_

Phone No. \_\_\_\_\_

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

Phone No. \_\_\_\_\_

Note: Essay and documentation to cover the period from July 1 through June 30. Essay limited to 1,000 words or less. Documentation items do *not* count against the word limit. Use this form as the first page of your essay.

**REGION VIII JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION**  
**SCORING SHEET**

**Judge's Name** \_\_\_\_\_

**Candidate** \_\_\_\_\_

**Date** \_\_\_\_\_ **Association** \_\_\_\_\_

**EDUCATION HELD**

1. Formal insurance courses sponsored or co-sponsored by the association  
SCORE \_\_\_\_\_
  
2. Workshop/class, seminar or institute course sponsored or co-sponsored by the Association.  
SCORE \_\_\_\_\_
  
3. NAIW educational courses, seminars or classes sponsored or co-sponsored by the association (i.e., How to be a Best Seller; Leadership Development; Managing your Career; Rules of the Road; Negotiating Skills or any other major NAIW educational program made available to local associations)  
SCORE \_\_\_\_\_
  
4. Members who instructed workshops/classes or seminars for the association or other industry organization (i.e., CIC, CPCU, CLU, IA, IIAA, PIA, etc.). Points apply to each workshop/class or seminar.  
SCORE \_\_\_\_\_
  
5. Members who instructed courses or institute course for the association or other industry organization  
SCORE \_\_\_\_\_
  
6. Education related articles written by an association member and published in the association's bulletin or other industry publication.  
SCORE \_\_\_\_\_
  
7. Professional designations held by members of the association (i.e., CIC, CPCU, CLU, ARM, AAI, AIS, etc.)  
SCORE \_\_\_\_\_
  
8. Member attendance at insurance related workshop/class, courses, seminar or institute.  
SCORE \_\_\_\_\_

**ESSAY**

Essay not to exceed 1,000 words (must be typed, double spaced), which addresses the associations commitment to education and what they have accomplished over the previous year. (This score is a subjective score by the judge – maximum of 25 points)

SCORE \_\_\_\_\_

**TOTAL SCORE** \_\_\_\_\_

**D. ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS:**

1. The Regional Awards Committee Chairman shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and addresses of the three (3) committee members that will judge the entries. The local association shall return one set of the completed entry, essay and all required documentation to the chairman and each of the committee members listed, not later than February 1.
2. Each entry shall consist of:
  - a. An essay of not more than 1,000 words with particular emphasis on the criteria listed in this section.
  - b. Entry must be signed by the association president.
3. The committee shall assign the points to each entry based on the criteria/point system provided in item 6 of this section.
4. A plaque, medallion or other memento will be presented to the winning association.
5. The Award shall be presented at the Regional Conference.

6. The points shall be based on:	<u>Point Value</u>
1. Public relations activities, such as radio or TV public service announcements, newspaper or other type media announcements of meetings, newspaper articles or other type of media articles on individual association members, articles promoting the association's activities and programs. (This section will be judged based on the over-all activity of the association. A maximum of 25 points applies to this category.)	25 max pts
2. Program sponsored by the Public Relations Committee, i.e. NAIW Week event, Industry Appreciation or recognition programs, etc.	20 pts each
3. CWC (Communicate with Confidence) course sponsored or co-sponsored by the association.	20 pts each
4. CWC contestant in the state, regional and national Speak-Off. Points apply individually to each level of competition.	10 pts each
5. Association members speaking on insurance and/or association related subjects to other industry organizations.	5 pts each
6. Association members speaking on insurance and/or association related subjects to non-insurance organizations.	10 pts each

- |   |             |
|---|-------------|
| 7. Community involvement programs (i.e., food drives for the needy, special holiday projects, donations to non-profit charities, projects to assist the homeless, etc.) | 10 pts each |
|---|-------------|

MINIMUM points required for eligibility	100
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**Note:** Documentation must accompany the entry listing names, dates, organizations, copies of each article, printed programs and any other related data; otherwise points will not be given.

**ENTRY FORM**

**ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS**

ASSOCIATION: \_\_\_\_\_

# OF MEMBERS AS OF 6/30/\_\_\_\_\_  
(must agree with NAIW membership records)

Education Chairman: \_\_\_\_\_

Phone No. \_\_\_\_\_

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

Phone No. \_\_\_\_\_

Note: Essay and documentation to cover the period from July 1 through June 30. Essay limited to 1,000 words or less. Documentation items do *not* count against the word limit. Use this form as the first page of your essay.

**REGION VIII ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS**  
**SCORING SHEET**

Judge's Name \_\_\_\_\_

Candidate \_\_\_\_\_

Date \_\_\_\_\_ Association \_\_\_\_\_

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**PUBLIC RELATIONS ACTIVITIES**

- 1. Public relations activities  
Maximum of 25 points SCORE \_\_\_\_\_
  
- 2. Program sponsored by the Public Relations Committee SCORE \_\_\_\_\_
  
- 3. CWC ( Communicate with Confidence) course sponsored  
or co-sponsored by the association SCORE \_\_\_\_\_
  
- 4. CWC contestant in the State, Regional or National Speak-Off SCORE \_\_\_\_\_
  
- 5. Association members speaking on insurance and/or association  
related subjects to other industry organizations SCORE \_\_\_\_\_
  
- 6. Association members speaking on insurance and/or association  
related subjects to non-insurance organizations SCORE \_\_\_\_\_
  
- 7. Community involvement programs SCORE \_\_\_\_\_

SUBTOTAL SCORE \_\_\_\_\_

**ESSAY**

Essay not to exceed 1,000 words (must be typed, double spaced), which addresses the associations commitment to the public relations activities required to advance awareness of NAIW.

(This score is a subjective score by the judge – maximum of 25 points)

SCORE \_\_\_\_\_

TOTAL SCORE \_\_\_\_\_

**E. E. C. SMITH, JR. MEMORIAL AWARD FOR SAFETY:**

1. The Regional Awards Committee Chairman shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and addresses of the three (3) committee members that will judge the entries. The local association shall return one set of the completed entry, essay and all required documentation to the chairman and each of the committee members listed not later than February 1.
2. Each entry shall consist of:
  - a. An essay of not more than 1,000 words with particular emphasis on the criteria listed in this section.
  - b. Entry must be signed by the association president.
3. The committee shall assign the points to each entry based on the criteria/point system provided in item 6 of this section.
4. A plaque, medallion or other memento will be presented to the winning association.
5. The Award shall be presented at the Regional Conference.

<b>6. The points shall be based on:</b>	<b><u>Point Value</u></b>
1. Association membership in the state and/or National Safety Council.	10 points each
2. Safety projects sponsored by the association. Full details and documentation required on each project must be included. (Points are per project, not by the days involved in the project).	45 points each
3. Awards and/or recognition received by the association for their safety projects from organizations other than NAIW.	20 points each
4. Safety articles and reports by the Safety Committee published in the local association's bulletin or other industry publication.	10 points each
6. Speakers on safety related topics at monthly meetings	15 points each
7. Association members speaking to other organizations on safety related topics.	10 points each
<b>MINIMUM points required for eligibility</b>	<b>100</b>

**ENTRY FORM**

**E. C. SMITH, JR. MEMORIAL AWARD FOR SAFETY**

ASSOCIATION: \_\_\_\_\_

# OF MEMBERS AS OF 6/30/\_\_\_\_\_  
(must agree with NAIW membership records)

Safety Chairman: \_\_\_\_\_

Phone No. \_\_\_\_\_

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

Phone No. \_\_\_\_\_

Note: Essay and documentation to cover the period from July 1 through June 30. Essay limited to 1,000 words or less. Documentation items do *not* count against the word limit. Use this form as the first page of your essay.

**REGION VIII E. C. SMITH, JR MEMORIAL AWARD FOR SAFETY**  
**SCORING SHEET**

Judge's Name \_\_\_\_\_

Candidate \_\_\_\_\_

Date \_\_\_\_\_ Association \_\_\_\_\_

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**SAFETY RELATED ACTIVITIES**

- |  |             |
|--|-------------|
| 1. Association membership in the state and/or National Safety Council  | SCORE _____ |
| 2. Safety projects sponsored by the association  | SCORE _____ |
| 3. Awards and/or recognition received by the association for their safety projects from organizations other than NAIW              | SCORE _____ |
| 4. Safety articles and reports by the Safety Committee published in the local association's bulletin or Other industry publication | SCORE _____ |
| 6. Speakers on safety related topics at monthly meetings   | SCORE _____ |
| 7. Association members speaking to other organizations on safety related topics.   | SCORE _____ |

**SUBTOTAL SCORE \_\_\_\_\_**

**ESSAY**

Essay not to exceed 1,000 words (must be typed, double spaced), which addresses the associations commitment to the safety.

(This score is a subjective score by the judge – maximum of 25 points)      SCORE \_\_\_\_\_

**TOTAL SCORE \_\_\_\_\_**

**F. REGIONAL ORGANIZATION AND MEMBERSHIP CERTIFICATE:**

The Regional Vice President shall present a certificate of appreciation to any association who has been instrumental in the organization and chartering of a new association since the preceding conference.

**G. ASSOCIATION OF THE YEAR AWARD:**

Purpose: To give recognition to a local Region VIII association that has demonstrated outstanding commitment to the goals, objectives, programs and projects of NAIW.

1. The Regional Awards Committee Chairman shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and addresses of the three (3) committee members that will judge the entries. The local association shall return one set of the completed entry form, essay and all required documentation to the chairman and each of the committee members listed not later than February 1.
2. Associations receiving this award are ineligible for a period of three (3) years following the year for which they received the award. (Note: example - award based on the term ending 6/30/07, winner not eligible to submit again until the 2011 award term).
3. Each entry shall consist of:
  - a. An essay of not more than 500 words with particular emphasis on the criteria and point system listed in item 6.
  - b. Entry must be signed by the association president.
4. The judges will assign the points to each entry based on the criteria/point systems as shown in item 6 of this section.
5. The Award will be presented at the Regional Conference.
6. The points shall be based on:

		<u>Point Value</u>
<u>MEMBERSHIP</u>		
Retention:		75%-100% = 25 pts
Membership Listing and count as of June 30* Prior Year	_____	51%-74% = 15 pts
Membership Listing as of June 30* Current Year	_____	
Number of Members' names appearing on both lists	_____	
% of Retention (# on both lists divided by prior year #)	_____	
* Numbers must correspond with NAIW membership listing.		
Expansion:		16 – 20 = 20 Points
Membership Count as of June 30**	Prior Year _____	11 – 15 = 15 Points
Membership Count as of June 30**	Current Year _____	6 – 10 = 10 Points
		1 – 5 = 5 Points

## ASSOCIATION ACTIVITY

### Membership Participation and Attendance:

<u>Meetings Held</u>	<u># of Members Attending</u>	<u>% Attendance</u>	<u>Speaker/Education</u>
<i>Give meeting dates</i>	<i>From Sign-in Sheets</i>	<i># member attendees</i>	<i>Program</i>
		<i>/# actual members</i>	

- |  |  |
|--|--|
| a. Points for every regular meeting held                             | 5 points per meeting held  |
| b. Points for % of member attendance at each meeting                 | 75% - 100% = 15 pts/Mtg<br>51% - 74% = 10 pts/Mtg<br>26% - 50% = 5 pts/Mtg |
| c. Points for each outside speaker at meetings noted in "a" above    | 5 pts per speaker (non-ed)   |
| d. Points for each education session at a meeting noted in "a" above | 10 pts per education prog  |

Monthly association bulletin or newsletter via hard copy or internet. 10 pts per issue  
\* Attach copies of each issue.

### Members actively participating in local association positions:

Executive Board	20 pts each position
Board of Directors	10 pts each position
Committee Chairs	5 pts each position

## EDUCATION

Educational programs the association sponsored whether industry, NAIW, seminars, institutes or other. These programs are not associated with a regular association meeting and have not been listed elsewhere. Education conducted at a monthly meeting is counted under Association Activity. 10 pts each(max. 50 pts)

## COMMUNITY ACTION/PUBLIC RELATIONS

Community action/Public Relations programs and/or projects Sponsored or co-sponsored by the association (i.e., participation in Jr. Achievement, food drives, sponsoring a school, volunteer work as on association). 20 pts ea (max. 100 pts)

## OTHER NON-NAIW INDUSTRY INVOLVEMENT

Members who have served other industry organizations in any elected or appointed position during the past year. Provide name and position for each eligible members. 5 pts per position held (max. 50 pts)

## SAFETY

Safety programs sponsored or co-sponsored by the association. These programs are not associated with a regular association Meeting and have not been listed elsewhere. Safety programs conducted at a monthly meeting are counted under Association Activity.

10 pts each  
(max. 50 pts)

**\*\* There are no minimum points required to be eligible for this award as the intent is for all Region VIII associations, of all sizes, to have equal opportunity to qualify. There have been maximums set in several categories to mitigate any unfair advantage larger associations may have. The purpose has been slightly altered to remove the language "and the association's members have shown above average commitment to education, safety, legislation and their community" as it is felt that there are other awards within Region VIII that recognize those areas.**

ENTRY FORM  
ASSOCIATION OF THE YEAR AWARD

ASSOCIATION: \_\_\_\_\_

# OF MEMBERS AS OF 6/30/\_\_\_\_  
(must agree with NAIW membership records)

Award Contact Person: \_\_\_\_\_

Phone No. \_\_\_\_\_

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

Phone No. \_\_\_\_\_

Note: Essay and documentation to cover the period from July 1 through June 30. Essay limited to 500 words or less. Documentation items do *not* count against the word limit. Use this form as the first page of your essay.

**ASSOCIATION OF THE YEAR SCORING SHEET**

**Judge's Name** \_\_\_\_\_

**Candidate** \_\_\_\_\_

**Date** \_\_\_\_\_ **Association** \_\_\_\_\_

**MEMBERSHIP**

Retention:

    % of retention (# on both lists divided by prior yr #) **SCORE** \_\_\_\_\_

Expansion:

    Enter Increase or Decrease **SCORE** \_\_\_\_\_

**ASSOCIATION ACTIVITY**

a. Points for every regular meeting held **SCORE** \_\_\_\_\_

b. Points for % of member attendance at each meeting **SCORE** \_\_\_\_\_

c. Points for each outside speaker at meeting noted in "a" above **SCORE** \_\_\_\_\_

d. Points for each educational session at a meeting noted in "a" above **SCORE** \_\_\_\_\_

Monthly association bulletin or newsletter via hard copy or internet **SCORE** \_\_\_\_\_

Members actively participating in local association positions

    Executive Board **SCORE** \_\_\_\_\_

    Board of Directors **SCORE** \_\_\_\_\_

    Committee Chairs **SCORE** \_\_\_\_\_

**EDUCATION** **SCORE** \_\_\_\_\_

**COMMUNITY ACTION/PUBLIC RELATIONS**

    Community Service **SCORE** \_\_\_\_\_

**OTHER NON-NAIW INDUSTRY INVOLVEMENT** **SCORE** \_\_\_\_\_

**SAFETY** **SCORE** \_\_\_\_\_

**ESSAY**

    Essay not to exceed 500 words (must be typed, double spaced),  
    which addresses the association's activity and commitment  
    to NAIW. (Subjective points by judges maximum 25 points) **SCORE** \_\_\_\_\_

**TOTAL SCORE** \_\_\_\_\_

## G. REGION VIII YOUNG PROFESSIONAL OF THE YEAR AWARD

### Criteria for Judging

- NAIW Involvement
- Industry Involvement
- Education
- Brief Essay

### Eligibility

- Must be a Member of NAIW for 36 months with no lapse in membership
- Must be in the Insurance industry of NAIW eligible industry for 36 continuous months
- Must be under 40 years of age (at time of submission)

### On What is Judging Based

- Activity Summary Form – all activities and other information submitted by the candidate on the application form must have occurred during the applicant's NAIW Membership
- Essay Question – not to exceed 200 words based on one of the following topics: Where do you see NAIW going and what roll would you like to play in one of the following areas:
  - Networking outside the workplace
  - Community service
- Education

**\*\*IMPORTANT: Once a member receives the Region VIII Young Professional of the Year Award, they may not apply for the same Award for three calendar years.**

### How to Complete and Submit an Application

1. Applications may be submitted either electronically or by mail at the discretion of the Regional Vice President. Please contact the RVP to learn how to submit the application.
  - If sent electronically, include all information requested within the application
  - If application is mailed, send the original **PLUS THREE COPIES** with all required attachments to the RVP.
2. The RVP is responsible for confirming the eligibility of the nominee, the length of the essay, and that all appropriate information is attached.
3. Any member of Region VIII whose association of record is in Region VIII is eligible as a nominee for this Award, with the exception of the presiding Regional Vice President and any previous Region VIII Young Professional of the Year Award recipient.

4. A detailed resume which includes, but is not limited to, the categories listed in the point system. The committee shall assign the points to each entry based on the criteria and point system shown in item 7 of this section.
5. If in the collective judgment of the committee none of the submissions have met the point system criteria or reflect the purpose or the spirit of the award, no award shall be given.
6. The Award shall be presented at the Regional Conference.
7. The points shall be based on:

Point Value

State, Regional and National Level:

Section I Leadership:

- State Meetings, Conferences and Conventions Attended 2 points each
- Committee Chairmanships held 3 points each
- General Participation – Committees Served 9 point (maximum)

Section II Education:

- Insurance education courses, classes, seminars and Institutes attended 1 pt each (10 pt max.)
- CPIW/CPIW designation 2 points
- Other insurance designations, i.e., CPCU, CIC, CLU, ARM, AAI, AIS, AAU, etc. 1 point each
- NAIW Courses 1 point each

Section III Community Service

- List any participation within your community regarding safety, public relations, networking, other industry related programs, or any other community involvement. 1 point each

Section IV – Brief Essay Essay Question – not to exceed 200 words based on one of the following topics:

Where do you see NAIW going and what roll would you like to play in one of the following areas:

- Networking outside the workplace
- Community Service
- Education

**\*\*Responses for Sections I, II, and III require a separate paper listing in logical order, by use of the Section Headers for ease of judging. No documentation will be necessary; however, you must list the title and date of the specific item to which you are referring.**

**The Regional Vice President shall select three NAIW Members outside of Region VIII to judge the submissions. The candidate submissions and the scoring sheet will be provided to each judge.**

**IMPORTANT: Under no circumstances should the completed judge's forms ever be shown or given to the contestants or any other member. The judges' forms must be destroyed immediately after the winner is determined.**

**REGION VIII YOUNG PROFESSIONAL OF THE YEAR AWARD**

**SCORING SHEET**

Judge's Name \_\_\_\_\_

Candidate \_\_\_\_\_

Date \_\_\_\_\_ MAL \_\_\_\_\_ or Association \_\_\_\_\_

Continuous Months in NAIW \_\_\_\_\_ Continuous Months in Industry \_\_\_\_\_ Current Age \_\_\_\_\_

**SECTION I – LEADERSHIP**

This section describes the candidate's Leadership Role in all levels of NAIW. Points are awarded for attendance at State Meetings, Regional Conferences, National Conventions; Chairmanship held at the State, Regional, and National Level; and General Participation at the State, Regional and National Level.

SCORE \_\_\_\_\_

**SECTION II – EDUCATION**

This section shows the candidate's awareness of one of NAIW's main focuses – Education - and their pursuit of continuing education. Points are awarded for both NAIW courses and Industry courses that the candidate has taken.

SCORE \_\_\_\_\_

**SECTION III – COMMUNITY SERVICE**

This section indicates participation outside of NAIW. Points are awarded for involvement with programs in their community regarding safety, public relations, networking, industry functions, and other community activities.

SCORE \_\_\_\_\_

**SECTION IV – ESSAY**

Essay not to exceed 200 words (must be typed, double spaced) based on one of the following topics:

Where do you see NAIW going and what roll would you like to play in one of the following areas:

- Networking outside the workplace
- Community Service
- Education (This score is a subjective score by the judge – maximum of 25 points)

SCORE \_\_\_\_\_

**TOTAL SCORE** \_\_\_\_\_

## SECTION 2 - FINANCE

- A. An Awards Fund shall be established as the Region VIII Award Fund, National Association of Insurance Women, International.
- B. The permanent depository for the funds shall be in an interest bearing account in the name of the Fund as set forth in Item A, in a branch of a federally insured financial institution convenient to the current custodian.

The agreement of the current Regional Vice President is to be obtained prior to the Custodian moving the account to a new financial institution.

There shall be two authorized signers on the account annually. The first shall be the acting Custodian who is responsible for all deposits and withdrawals; the second shall be the signature of the current Regional Vice President to be used only in emergencies.

- C. Prior to the end of the term, new bank cards shall be obtained to (1) obtain the signatures of the new Custodian and Regional Vice President and (2) transfer the funds to the appropriate financial institution, as determined by the incoming Custodian.
- D. Allowed Expenses:
1. Not more than \$100.00 each for the purchase of the award plaque or object for the Region VIII Member of the Year, Hall of Fame, Jeffrey Nordhaus Memorial Award for Education, Roy Pasini Memorial Award for Public Relations, E. C. Smith, Jr. Memorial Award for Safety, Region VIII Young Professional of the Year and the Region VIII Association of the Year Award.
  2. Appropriate fee for an NAIW Certificate of Appreciation for the Organization and Membership recognition. Note: Certificate can be obtained from NAIW Headquarters.
  3. Not more than \$300.00 for the transportation and hotel expense, not otherwise reimbursed, for the Regional Communicate with Confidence Speak-Off contestant to the National Convention.
  4. Not more than \$300.00 for transportation and hotel expense, not otherwise reimbursed, for the Regional Rookie of the Year contestant to the National Convention.
  5. Not more than \$100.00 total combined postage/photocopy expense shall be reimbursable to the Regional Awards Chairman and/or Regional Vice President. Postage reimbursement is limited to first class mail costs. Reimbursement will be made based on receipts submitted to the Custodian.

## Section 3 - Amendments

The Region VIII Awards Committee will administer the Region VIII Awards Fund Procedure Manual, make changes, as deemed necessary, with the final approval resting with the Regional Vice President. Upon approval of the Regional Vice President, the revisions will be presented to the members at the Regional Conference, and printed and distributed to all local associations immediately. Should any award criteria change, the new criteria will apply to the awards presented at the following year's conference.

**ACCOUNTING PROCEDURES**

**FOR**

**NAIW REGION VIII**

**TRUST FUND ACCOUNT**

**added**

**March 20, 1999**

**ACCOUNTING PROCEDURES  
NAIW, REGION VIII  
TRUST FUND ACCOUNT**

1. All Expenses paid from this trust fund must be in accordance with the Region VIII Bylaws and Awards Fund Procedure Manual. A copy of the *current* Bylaws and Manual are to be kept in the Trustee's file.
2. All requests for payment of expenses must have receipts and other related documentation attached to the request before the expense can be paid. All receipts and documentation are to be kept in the file for audit.
3. All income received should have documentation as to the source of the income. A copy of the checks that are deposited should be attached to the deposit slip and kept in the file for audit.
4. The check register is to be maintained in an orderly manner, i.e., date of transaction; check #, deposit # or interest earned; payee and description of expense or income; amount of check or deposit and the balance in the account after each transaction.
5. The bank statements are to be reconciled immediately upon receipt of the statement from the bank. The interest earned during the statement period is to be entered on the register and the new balance. All checks, income deposit documents and expense documents are to be stapled to the back of the statement and filed in chronological order.
6. The Trustee will prepare a Financial Report\* annually, prior to the Annual Conference, which is to be provided to the Audit Chair with the financial records, as follows:
  1. Annual Financial Report and Annual Audit Report from the prior year.
  2. Annual Financial Report of the Trustee for the current year.
  3. All bank statements and the documentation that applies to each statement.
7. This account is to be audited at the Annual Regional Conference. A written Audit Report\* is to be completed by the Audit Chair with a copy for the Regional Vice President, Conference Secretary, the Trustee's file and the Audit file.

\* Note: Financial Report Forms have been provided for this purpose. The blank forms can be copied for future needs.

\* Note: Audit Forms have been provided in the file for use in preparing the audit report. Blank forms can be copied for future needs.

**A binder has been provided for the Trustee, in which all of the items described in these procedures are to be kept. The files are to be kept up to date and old items moved to the prior years section of the binder, as needed.**

8. All files should be turned over to the outgoing Regional Vice President immediately following the National Convention as the RVP then becomes the new Trustee.
9. Do not throw away any records. We are required by law to maintain records for a minimum of seven (7) years.
10. Reports that may be necessary for the IRS will be the responsibility of the trustee. Such reports must be signed by the trustee and the current Regional Vice President, as the official officer of the region.
11. An Audit Committee binder is also provided for the Audit Chair. The report of the audit committee is to be placed in the binder and passed on to the next Audit Chair prior to the annual regional conference.

Added 3/20/99

**TRUSTEE'S ANNUAL FINANCIAL REPORT**  
**NAIW, REGION VII, TRUST FUND**  
 March \_\_, \_\_ Through March \_\_, \_\_

BALANCE ON HAND AS OF THE LAST ANNUAL AUDIT:

(A) \$ \_\_\_\_\_

REVENUE (INCOME)

Description:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL REVENUE

(B) \$ \_\_\_\_\_

TOTAL ASSETS (A) + (B) =

(C) \$ \_\_\_\_\_

EXPENSES

Description:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL EXPENSES

(D) \$ \_\_\_\_\_

BALANCE IN ACCOUNT (C) - (D) = NET WORTH

(E) \$ \_\_\_\_\_

Submitted by:

\_\_\_\_\_  
Trustee

Dated: \_\_\_\_\_

added 3/20/99

**NAIW, REGION VIII**  
**ANNUAL AUDIT OF TRUST FUND REPORT**  
 March \_\_, \_\_ Through March \_\_, \_\_

BALANCE ON HAND AS OF THE LAST ANNUAL AUDIT:

(A) \$ \_\_\_\_\_

REVENUE (INCOME)

Description:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL REVENUE (B) \$ \_\_\_\_\_

TOTAL ASSETS (A) + (B) = (C) \$ \_\_\_\_\_

EXPENSES

Description:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL EXPENSES (D) \$ \_\_\_\_\_

BALANCE IN ACCOUNT (C) - (D) = NET WORTH (E) \$ \_\_\_\_\_

added 3/20/99



**NAIW, REGION VIII, TRUST FUND**

**EXPENSE REIMBURSEMENT AND INCOME FORM**

TO: \_\_\_\_\_, Trustee DATE: \_\_\_\_\_

**EXPENSE**

FROM: \_\_\_\_\_ PHONE: \_\_\_\_\_

REASON FOR EXPENSE: \_\_\_\_\_ COMMITTEE: \_\_\_\_\_

PAY TO: \_\_\_\_\_ AMOUNT: \$ \_\_\_\_\_

NOTE: All expense items must have accompanying receipts. Attach receipts to the back of this form. Provide a breakdown, if amount due is for more than one committee or project. Space is provided below for any explanation that is required on this request.

TO BE COMPLETED BY TRUSTEE: Expenditure approved: \_\_\_\_\_, Trustee

Date: \_\_\_\_\_ Check No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

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**INCOME**

FROM: \_\_\_\_\_ PHONE: \_\_\_\_\_

SOURCE OF INCOME: \_\_\_\_\_ COMMITTEE: \_\_\_\_\_

AMOUNT ATTACHED: \$ \_\_\_\_\_ (\$ \_\_\_\_\_ CASH \$ \_\_\_\_\_ CHECKS)

added 3/20/99