



# Jack E. Bobo AWARD OF EXCELLENCE



2011-2012

The Jack E. Bobo Award of Excellence was developed at the recommendation of the Transformation Task Force Report of April 2003. The award is based on the critical components identified as crucial to strengthening the NAIFA Federation and increasing membership. This award has been named in honor of Jack E. Bobo, CLU, FLMI, who proudly served NAIFA as National President and as Executive Vice President. Additionally, Jack E. Bobo is a recipient of the prestigious John Newton Russell Award. Appropriately, this award recognizes associations and their leaders who excel in all facets of association management including Advocacy, Governance, Membership, and Programs and Professional Development.

The purpose of the Jack E. Bobo Award of Excellence is to: 1) ensure the award is a guidepost for progress towards improving local & state associations to deliver at least minimum standards in all mission critical areas; 2) reward those exceeding minimum standards in all primary areas defined in NAIFA in the 21st Century; and 3) give special recognition to those associations who exceed those standards to a high degree (associations who can serve as models for others).

### WINNING CRITERIA:

The Jack E. Bobo Award of Excellence may be achieved on one of three levels.

- **Platinum** (Well Exceeds Expectations — 95 + points) A local association cannot achieve this level without reaching 100% of their national membership goal.
- **Gold** (Exceeds Expectations — 85 to 94 points) A local association cannot achieve this level without their membership total increasing by 1 from the prior year.
- **Silver** (Meets Expectations — 75 to 84 points) A local association cannot achieve this level without their membership total increasing by 1 from the prior year.
- **Honorable Mention** (95+ points) A local association cannot achieve this level without reaching a minimum of 95% of their national membership goal.

### INSTRUCTIONS:

**1. Deadline for completion and submission is July 9, 2012**

The Jack E. Bobo Award of Excellence application has complete online capability. You may submit your application online at [www.naifa.org/benefits/awards/bobo.cfm](http://www.naifa.org/benefits/awards/bobo.cfm) or submit a hard copy in a three ring binder to: NAIFA-Award of Excellence, 2901 Telestar Court, Falls Church, VA 22042.

Award applications and all supporting materials must be **postmarked** or submitted online by July 9, 2012. If you elect to submit a three ring binder it must be properly organized and labeled, if it is not it will not be reviewed. We recommend you use a form of mail that may be tracked, such as return receipt requested, certified mail, or overnight mail services such as UPS, DHL, or FedEx.

**2. Supporting material is required for many questions in order for points to be awarded. If supporting material is not provided as requested and clearly labeled to correspond to the question (Example D:1), points will not be earned. You **MAY** use the same documentation more than once to answer multiple questions. Supporting material **CANNOT** be handwritten and must be typed.**

For questions that can be answered by pre-printed materials, please label with the section and question number (Example A:1), or points may not be earned. Any supporting material that is not appropriately labeled or explained 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 by December 31, 2011.**

**4. All answers will be subject to verification by NAIFA. Some Membership, IFAPAC, and APIC information will be verified by NAIFA records.**

**5. If you wish for your application to be returned to you following the 2012 NAIFA Career Conference and Annual Meeting, you must include a self addressed envelope large enough to hold your application with the appropriate prepaid postage.**

### ASSOCIATION & VERIFICATION INFORMATION:

Association Name	Association Number	State
Name	Position	
<i>The information provided in this application is accurate and complete to the best of my knowledge.</i>		
Signature	Date	

Before an application is to be considered the local association must complete the fact finding Section in its entirety. Although this section is not scored, in accordance with the local association minimum standards ([www.naifa.org/leaders/governance/documents/Local\\_Benchmarks\\_FINAL.pdf](http://www.naifa.org/leaders/governance/documents/Local_Benchmarks_FINAL.pdf)), please provide the following information:

## FACT FINDING SECTION

- Tax Identification Number (TIN): \_\_\_\_\_
- IRS Determination Letter Issued?  Yes  No (If yes, please attach a copy. For information visit [www.irs.gov/charities/index.html](http://www.irs.gov/charities/index.html))
- Tax Return (or information) filed with IRS for most current fiscal year?  Yes  No (For information visit [www.irs.gov/charities/index.html](http://www.irs.gov/charities/index.html).)
- Current bylaws have been approved and have been filed with the State and National Association within the last two years?  Yes  No
- Did your local association report their officers and mandatory committee chairs by the June 30 deadline and have voting privileges at the 2011 Annual NAIFA Convention and Career Conference?  Yes  No

### **A** ADVOCACY/GOVERNMENT RELATIONS (34 POINTS)

\*Please note that IFAPAC runs on a calendar year. Contributions must be received at NAIFA by December 31, 2011.

- Does your local association have an IFAPAC and APIC Chair? ♦ **PROVIDE NAME & ID NUMBER.**  
 IFAPAC Chair – **1 point**  APIC Chair – **1 point** **Points: \_\_\_\_\_**
- Did your local association hold a fundraising event to raise money for IFAPAC?  Yes  No  
 ♦ **INCLUDE DESCRIPTION WITH DATE AND ATTACH PROMOTION OF THE FUNDRAISING EVENT** **2 points**
- Did your local association send three written communications to its members dedicated to IFAPAC?  Yes  No  
 ♦ **SUBMIT COPIES OF EACH WRITTEN COMMUNICATION** **2 points**
- Did your local association hold and actively promote either a local legislative day or a local legislative forum, so members could attend and interact with state and/or federal legislators and their staff?  Yes  No  
 ♦ **INCLUDE DESCRIPTION OF LEGISLATIVE FORUM AND PROMOTION SAMPLE** **2 points**
- Did your local association increase their IFAPAC *contributions* over the prior year?  
 5% to 11% increase – **1 point**  12 % or greater increase – **3 points** **Points: \_\_\_\_\_**
- Did your local association increase their IFAPAC *contributors* over the prior year?  
 5% increase – **1 point**  12 % or greater increase – **3 points** **Points: \_\_\_\_\_**
- Did *all* of the members of your Board of Directors contribute to IFAPAC at either the “Ambassador” – \$200-299 (or higher), “Century” – \$100-199, “Investor” – \$50-99, levels? ♦ **PROVIDE A LIST OF YOUR BOARD AND THEIR CONTRIBUTION AMOUNTS.**  
 “Ambassador” or higher – **5 points**  “Century” – **3 points**  “Investor” – **2 points** **Points: \_\_\_\_\_**
- What percentage of your membership contributed to IFAPAC?  
 50% – **5 points**  40% – **3 points**  35% – **2 points** **Points: \_\_\_\_\_**
- Did your local association report the names of new APIC contacts (must be current NAIFA members) who have relationships with their federal and state legislators and provide an updated list to the State APIC Chair *and* NAIFA and meet with their legislators at least twice during the year?  
 Yes  No  
 ♦ **PROVIDE LIST OF NAIFA MEMBERS WITH LEGISLATIVE CONTACTS INDICATED** **4 points**
- Did your local association send at least two of its members to your state Day at the Capital or state legislative event?  Yes  No  
 ♦ **PROVIDE LIST OF NAIFA MEMBERS WHO ATTENDED THE DAY AT THE CAPITAL.** **4 points**
- Did your local association communicate and discuss state and federal legislative issues with your members at *every* meeting?  Yes  No  
 ♦ **INCLUDE DESCRIPTION** **2 points**

**TOTAL POINTS SECTION A**

### **B** GOVERNANCE & ADMINISTRATION (21 POINTS)

- Did your local association conduct planning sessions with their leadership teams (separate from board meetings) throughout the year?  
 Yes  No  
 ♦ **SUBMIT DATES AND OUTLINES** **2 points**
- Submit a copy of your local association’s annual action plan and explain how you met all of your goals/objectives. If you did not reach any of your goals/objectives explain why and where improvements may be made.  Yes  No  
**2 points**
- Did your local association promote the Managers Membership and Industry Awards, and designations?  Yes  No  
 ♦ **INCLUDE DESCRIPTION AND SAMPLE OF PROMOTION** **2 points**
- Did your local association provide recognition for long time members, those receiving the Managers Membership and Industry Awards, and any new designations?  Yes  No  
 ♦ **INCLUDE DESCRIPTION** **1 point**

5. Did your local association educate current members about available benefits and sales training?  Yes  No  
**◆ INCLUDE DESCRIPTION** **1 point**
6. Did your local association survey members for feedback on meetings, programs, etc.?  Yes  No  
**◆ SUBMIT SURVEY AND COMPLETE SUMMARY OF RESULTS** **1 point**
7. Did your local association hold a NEW member orientation?  Yes  No  
**◆ INCLUDE DESCRIPTION** **2 points**
8. Did the following leaders attend either the state Association Leadership Conference or any other training provided by the state?  
**◆ SUBMIT DATE AND OUTLINE**  
 • (minimum for all) **2 points**  
 i. President  
 ii. President-Elect  
 iii. Association Executive (if applicable)  
 iv. National Committeeperson  
 • (will also include those listed above) **3 points**  
 i. Government Relations Chair  
 ii. Membership Chair  
 iii. Professional Development & Programs Chair  
 • (will also include Everyone) **5 points**  
 i. Secretaryt  
 ii. Treasurer  
 iii. Health Chair  
 • N/A **1 point**  
**Points: \_\_\_\_\_**
9. Did your local association receive any media coverage? (Radio, Local/State Newspaper, Television)  Yes  No  
**◆ INCLUDE DESCRIPTION** **3 points**
10. Did your local association sponsor a charitable program?  Yes  No  
**◆ INCLUDE DESCRIPTION** **2 points**

**TOTAL POINTS SECTION B**

**C MEMBERSHIP (40 POINTS)**

1. Did your association reach your NAIFA membership goal for the year?  
 100 % – **20 points**  Increase begin year count by 1 – **10 points** **Points: \_\_\_\_\_**
2. Was a membership presentation made at a venue that had non-members in attendance? (Agency presentation, LUTC or FSS class etc.)  Yes  No  
**◆ SUBMIT DATE AND NAME OF PRESENTER** **1 point**
3. Did your local association attain 85% renewal retention?  Yes  No  
**3 points**
4. Did your local association increase in membership more than your NAIFA National membership goal?  Yes  No  
**3 points**
5. Did your local association create a membership development plan at the beginning of the year?  Yes  No  
**◆ PLEASE SUBMIT A COPY.** **3 points**
6. Did you recruit any new members from an agency membership presentation? **◆ PLEASE PROVIDE THE NAMES & ID NUMBERS.**  
 8 new – **5 points**  6 new – **4 points**  4 new – **3 points**  2 new – **2 points** **Points: \_\_\_\_\_**
7. Did any leader or member of your association give an agency presentation? **◆ PLEASE PROVIDE NUMBERS GIVEN AND DOCUMENTATION OF AGENCY PRESENTATIONS.**  
 1 presentation – **1 points**  2 presentations – **2 points**  3 or more – **3 points** **Points: \_\_\_\_\_**
8. Did your Local Membership Chair participate on the National Membership Committee Conference Calls?  
**2 points**

**TOTAL POINTS SECTION C**

**D PROGRAMS & PROFESSIONAL DEVELOPMENT (38 POINTS)**

1. Did your local association provide programs of interest for members in the areas of Life & Annuities (L&A), Health & Employee Benefits (H&EB), Multiline (ML), Financial Advising & Investments (FA&I), and a Legislative Day.  Yes  No  
**◆ SUBMIT CALENDAR LISTING ALL MEETINGS AND TOPICS** **3 points**
2. What percentage of your local association membership participated in a LUTC, FSS, or Horizon class that you sponsored? (Online classes included)  
 8 % or more – **4 points**  4% – **2 points** **Points: \_\_\_\_\_**
3. Did your local association educate members on available member benefits and training offered through NAIFA National?  
**◆ INCLUDE DESCRIPTION** **3 points**
4. Did your local association provide a venue outside of regularly scheduled meetings to increase networking opportunities for your members? (Ex. YAT networking event, study groups, online communication venue, mentoring program)  Yes  No  
**◆ INCLUDE DESCRIPTION** **2 points**

5. Did your local association get your city/town to proclaim September Life Insurance Awareness Month?  Yes  No  
 ◆ **INCLUDE DESCRIPTION AND COPY OF PROCLAMATION** **5 points**
6. What actions did the local association take as a result of your member surveys that were conducted?  Yes  No  
 ◆ **INCLUDE DESCRIPTION** **1 point**
7. Does the local association actively promote YAT initiatives?  Yes  No  
 ◆ **INCLUDE DESCRIPTION** **2 points**
8. What was the highest member percentage attendance at any non-social event? Submit roster indicating the date and who attended the meeting. Use the final membership number from the previous year as your base.  
 75% – **4 points**     50% – **2 points**     35% – **1 point**    **Points: \_\_\_\_\_**
9. Did your local association offer CE credits at its local meetings? Provide dates, course names, and CE credit amount.  
 8 or more credits – **4 points**     4 credits – **2 points**    **Points: \_\_\_\_\_**
10. Did your local association actively promote the Leadership of Life Institute (LILI) during a regular monthly meeting?  Yes  No  
 ◆ **INCLUDE DESCRIPTION OF PROMOTION** **3 points**
11. Did your local association recommend/support a candidate who submitted an application (2011-2012 association year) for the Leadership of Life Institute (LILI)?  Yes  No  
 ◆ **INCLUDE DESCRIPTION** **3 points**
12. Did your local association have members graduate from a LILI institute during the fiscal year?  
 2 or more graduates – **4 points**     1 graduate – **2 points**    **Points: \_\_\_\_\_**
13. Did your local association report a Local YAT Chair?  
 ◆ **INCLUDE DESCRIPTION** **1 point**

**TOTAL POINTS SECTION D**

## **E** SUPER BONUS

1. Submit a *new* creative idea that your association tried this year that worked. It may be a program or project that your association tried to improve in the areas of Advocacy, Membership, Sales Training and Education, and Networking. You *cannot* use any supporting documents or descriptions that you may have already used for a previous question. The judges are looking for something unique and creative. Decision by judges is final.

**Up to 4 points**

**TOTAL POINTS SECTION E**

## *Jack E. Bobo Association Award of Excellence* **DEDICATION**

It has been said many times “We stand on the shoulders of those who come before us.” Robert L. Rose, Louis I. Dublin and E. Dawn Nuckels were giants in our industry. The strengths and character of these three men embody the very values we seek to recognize with the Jack E. Bobo Award of Excellence. Louis I. Dublin (NAIFA Community Service Award), Robert L. Rose (NAIFA Professional Development Award), and E. Dawn Nuckels (IFAPAC Award), were truly men of vision, dedication and integrity. Their collective memories will be forever preserved within this prestigious award.



### **Robert L. Rose**

In the mid 1970s Robert L. Rose served as Chairman of the NALU Education Committee which was very successful in getting out the message on the value of life insurance. In 1976, Rose's Education Committee established life and health insurance reference shelves in many public and school libraries. The committee also developed a 12-week adult-education course in family finance and money management in a number of localities. After Rose's unexpected death in 1980, the NALU Board voted to name the Education Achievement Award (established in Sept. 1979) the “Robert L. Rose Education Achievement Award,” given to local and state associations for excellence in providing professional and consumer education on life insurance.



### **E. Dawn Nuckels**

Evers Dawn Nuckels was the California Association of Life Underwriters President from 1968-1969, National Committeeperson from 1970-1984 and chair of the NALU Political Action Committee in 1986. For 14 years, he served as CALU National Committeeperson at NALU conventions. Nuckels' high standards of conduct, diplomacy and effectiveness helped guide IFAPAC through a period of explosive growth, raising IFAPAC into the echelons of national PACs. Nuckels was instrumental in positioning IFAPAC as the most effective way agents and advisors can positively impact both state and federal elections.



### **Louis I. Dublin**

In 1957 NALU joined the Institute of Life Insurance in giving formal recognition to the tradition of community service with the institution of the Public Service Program. Earlier that year, Dr. Louis I. Dublin, consultant on health & welfare at the Institute of Life Insurance, announced that the first annual public service award was to be given. When the award was renamed for Dr. Dublin, Holgar Johnson, as Past President of NALU, said, “we wish to establish a living memorial to a man who represents Public Service in its highest sense.” This new award was given, for the first time, in 1961 at the NALU Convention in Denver, Colorado.