



REGION VII

INTERNATIONAL ASSOCIATION OF INSURANCE PROFESSIONALS (IAIP)

AWARDS FUND PROCEDURES MANUAL

Revised April 27, 2023

**International Association of Insurance Professionals Awards
Fund Procedure Manual**

****All Awards Are For the IAIP Fiscal Year 7/01 - 6/30 of
the Respective Award Year****

**AT THE DISCRETION OF THE AWARDS CHAIR ENTRIES MAY BE SUBMITTED VIA EMAIL,
REGULAR MAIL, FLASHDRIVE OR LINK TO DOCUMENT**

SECTION 1. AWARDS

A. REGION VII 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, Region VII and IAIP, which surpasses the accomplishments of other members of the region.

1. The most recent recipient of the Member of the Year shall be the chair of this awards committee and shall appoint three (3) IAIP members outside of Region VII to judge the entries. If the chair is unable to appoint three (3) IAIP members outside of Region VII to judge the entities, the presiding RVP will assist with the selection of judges.
2. The chair shall remove or conceal the applicant's personal information, i.e.: name, email, address, phone number and local association prior to forwarding submissions to the judges. Submissions must be received in word format.
3. The Regional Awards Committee Chair shall send notification to all members in good standing to submit their essay entries. All members in good standing that meet the eligibility requirements may submit for this award. The notification letter must be sent out prior to December 1 and contain the name, email address and telephone number of the Member of the Year Awards Chair. All entries are to be returned directly to that chairperson not later than February 1. The Member of the Year Awards Chair shall coordinate and forward entries to the selected judges.
4. Any member of the region whose association of record is in Region VII is eligible as a nominee for this award, with the exception of the presiding Regional Vice President and any member of Region VII, Region VIII or Region IX who has received the award in the last ten (10) years.
5. Each entry shall consist of:
 - A. An essay of not more than 1,000 words (include word count), which addresses the nominee's qualifications as stated in the award's purpose. The entry must be signed by the submitting member. A digital signature is acceptable.
 - 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 9 of this section.
 - C. Submissions are required to follow the award scoring criteria and itemized accordingly.
6. The Award Committee may also consider entries from the prior year, as long as the nominee's membership status and association affiliation is unchanged.
7. 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.
8. The Award shall be presented at the Regional conference or Annual Meeting.
9. The points shall be based on:

<u>Regional and International Level:</u>	<u>Point Value</u>
Committee Chair positions held	4 points each
Conferences & Conventions Attended	3 points each
General Participation	3 points max
IAIP Task Force Chair	2 points/term
IAIP Task Force Co-Chair	1 point/term

IAIP Task Force Committee Member	1 point each
IAIP Special Interest Community Chair	2 points each
IAIP Special Interest Community Co-Chair	1 point each

Local Association Level:

Officer or Board Positions held	4 points each
Chair positions held	2 points each
General Participation	4 points max
Attendance	2 points max

Member at Large Level:

Dual Membership in a Region VII local association	4 points max
Attendance at Region VII local association meetings or events	2 points each-10 points max
**Local Association Speaker	2 points each
IAIP Task Force Chair	2 points per term
IAIP Task Force Co-Chair	1 point per term
IAIP Task Force Committee Member	1 point each
IAIP Special Interest Community Chair	2 points each
IAIP Special Interest Community Co-Chair	1 point each

Education:

**IAIP Insurance education courses, classes, seminars and institutes taken	1 point each (10 pt Max)
**IAIP Courses instructed	1 point each
**Education articles written for an insurance industry or non-insurance industry publication	2 points each
CPIW, CPIM, CIIP, CLP, CLP-A, DAE designation	2 points each
Other insurance designations, i.e., CPCU, CIC, CLU, ARM, AAI, AIS, AAU, etc.	1 point each
MINIMUM points required for eligibility	23 points

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.

AN IAIP SESSION is a program of at least 1 hour in length.

****Documentation is required and must accompany the submission otherwise points will not be given.**

For IAIP courses taken a printout can be obtained from your member profile under professional development.

For IAIP Courses instructed provide a copy of the program, agenda or flyer showing instructor name and course taught

REGION VII MEMBER OF THE YEAR AWARD SCORING SHEET

Judges Name: _____

Candidate's Name: _____

Date: _____ **MAL:** _____ or **Association:** _____

LEADERSHIP

This section describes the candidate's Leadership Role in all levels of IAIP. Points are awarded for Chair positions held at the Regional and International Level: attendance at Regional Conferences or annual Regional meetings and International Conventions and General Participation at the Regional and International Levels.

Regional and International Level:

Committee Chair Positions held	4 points each	_____
Conferences & Conventions Attended	3 points each	_____
General Participation	3 points max	_____
Task Force/Special Interest Community:		
IAIP Task Force Chair	2 points per term	_____
IAIP Task Force Co-Chair	1 point per term	_____
IAIP Task Force Committee Member	1 point each	_____
IAIP Special Interest Community Chair	2 points each	_____
IAIP Special Interest Community Co-Chair	1 point each	_____

SCORE _____

Local Association Level:

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

Officer or Board Positions held	4 points each	_____
Chair positions held	2 points each	_____
General Participation	4 points max	_____
Attendance at meetings	2 points max	_____

SCORE _____

Member at Large Level:

This section shows the candidate's involvement and dedication to Region VII by accepting various positions, chairing committees and attending meetings.

Dual Membership in a Region VII local association	4 points max	_____
Attendance at Region VII local association meetings or events	2 points each-10 points max	_____
**Local Association Speaker	2 points each	_____
IAIP Task Force Chair	2 points per term	_____
IAIP Task Force Co-Chair	1 point per term	_____
IAIP Task Force Committee Member	1 point each	_____
IAIP Special Interest Community Chair	2 points each	_____
IAIP Special Interest Community Co-Chair	1 point each	_____

SCORE _____

Education:

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

**IAIP Insurance education courses, classes seminars and institutes taken	1 point each-10 point Max.	_____
**IAIP Courses instructed	1 point each	_____
**Education articles written for an insurance industry or non-insurance industry publication	2 points each	_____
CPIW, CPIM, CIIP, CLP, CLP-A, DAE designation	2 points each	_____
Other insurance designations, i.e, CPCU, CIC, CLU ARM, AAI, AIS, AAU, etc.	1 point each	_____

SCORE _____

MINIMUM points required for eligibility **23 points**

SUB-TOTAL SCORE _____

ESSAY

Essay not to exceed 1,000 words (must be typed and word count indicated), which addresses the nominee’s qualifications and addresses the individual’s outstanding personal achievement, leadership abilities and dedication to Region VII and IAIP. (This score is a subjective score by the judge---maximum of 25 points)

ESSAY SCORE _____

TOTAL SCORE _____

NOTES:

*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 ½ to 1-day program

AN IAIP SESSION is a program of at least 1 hour in length

****Documentation is required and must accompany the submission otherwise points will not be given.**

For IAIP courses taken, a printout can be obtained from your member profile under professional development.

For IAIP courses instructed provide a copy of the program, agenda or flyer showing instructor name and course taught.

B. REGION VII HALL OF FAME AWARD:

Purpose: To recognize and demonstrate Region VII's appreciation to members who, during their lifetime, have given their time and dedication to the development of their local association, Region VII and IAIP. This also replaces the former S.P.I.C.E (Seasoned Professional Involved in Commitment and Education) award from Region IX.

1. The most recent recipient of the Hall of Fame Award shall be the chair of this award committee and shall appoint three (3) IAIP members outside of Region VII to judge the entries. If the chair is unable to appoint three (3) IAIP members outside of Region VII to judge the entities, the presiding RVP will assist with the selection of judges.
 2. The chair shall remove or conceal the applicant's personal information, i.e.: name, email, address, phone number and local association prior to forwarding submissions to the judges. Submissions must be sent in word format.
 3. The Regional Awards Committee Chair shall send notification to all members in good standing to submit their essay entries. All members in good standing that meet the eligibility requirements may submit for this award. The notification letter must be sent out prior to December 1 and contain the name, email address and telephone number of the Hall of Fame Awards Chair. All entries are to be returned directly to that chairperson not later than February 1. The Hall of Fame Awards Chair shall coordinate and forward entries to the selected committee members.
 4. Any member of the region whose association of record is in Region VII ** 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 Region VII, Region VIII Hall of Fame or Region IX S.P.I.C.E. Award recipient.
 5. Each entry shall consist of:
 - A. An essay of not more than 1,000 words (include word count), which addresses the nominee's qualifications as stated in the award's purpose. The entry must be signed by the submitting member. A digital signature is acceptable.
 - 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 point system shown in item 8 of this section.
 - C. Submissions are required to follow the award scoring criteria and itemized accordingly.
- The Awards 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 or Annual Meeting.
 8. Eligibility Requirements: Any member of Region VII whose membership of record is in Region VII is eligible as a nominee for this Award who meet the following requirements, with the exception of the presiding Regional Vice President and any previous Region VII or Region VIII Hall of Fame Award recipient or recipient of Region IX's S.P.I.C.E award :
 - A. A minimum of fifteen (15) years in IAIP with no lapse in membership status.
 - B. A minimum of twenty-five (25) years insurance experience.
 - C. Significant contributions to IAIP and to the insurance industry.

The points shall be based on:	Point Value
Regional Officer positions held	3 points each term
Regional Vice President Assistant positions held	1 point each term
Regional Committee Chair positions held	3 points each
Regional Committee Co- Chair positions held	1 point each
Attendance at Regional conferences or annual meetings	3 points each
International Officer positions held	2 points each term
International Committee Chair positions held	2 points each
International Committee Co-Chair positions held	1 point each
Attendance at International Conventions	1 point each
IAIP Task Force Chair	2 points each
IAIP Task Force Co-Chair	1 point each

IAIP Task Force Committee Member	1 point each
IAIP Special Interest Community Chair	2 points each
IAIP Special Interest Community Co-Chair	1 point each
MINIMUM points required for eligibility	15 Points

REGION VII HALL OF FAME AWARD SCORING SHEET

Judges Name: _____

Candidate's Name: _____

Date: _____ **MAL:** _____ or **Association:** _____

Number of Years in IAIP: _____ **Number of years Insurance Experience:** _____

LEADERSHIP

This section describes the candidate's Leadership Role in all levels of IAIP. Points are awarded for Chair positions held at the Regional and International Level: attendance at Regional Conferences or annual Regional meetings and International Conventions and General Participation at the Regional and International Levels.

Regional Officer Positions Held	3 points each term	_____
Regional Vice President Assistant positions held	1 point each term	_____
Regional Committee Chair positions held	3 points each	_____
Regional Committee Co-Chair positions held	1 point each	_____
Attendance at Regional Conferences or Annual Meetings	3 points each	_____
International Officer positions held	2 points each term	_____
International Committee Chair positions held	2 points each	_____
International Committee Co-Chair positions held	1 point each	_____
Attendance at International Conventions	1 point each	_____
IAIP Task Force Chair	2 points each	_____
IAIP Task Force Co-Chair	1 point each	_____
IAIP Task Force Committee Member	1 point each	_____
IAIP Special Interest Committee Chair	2 points each	_____
IAIP Special Interest Community Co-Chair	1 point each	_____

MINIMUM points required for eligibility **15 Points** **SUB-TOTAL SCORE** _____

ESSAY

Essay not to exceed 1,000 words (must be typed and the word count indicated), which addresses the nominee's qualifications and addresses the individual's lifetime of dedication to the development of Region VII and IAIP. (This score is A subjective score by the judge, maximum of 25 points)

ESSAY SCORE _____

TOTAL SCORE _____

C. JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION:

Jeffrey Nordhaus, the son of George Nordhaus was killed in an American Airlines plane crash on May 25, 1979. Jeff was just getting involved in his father’s business when this occurred. This Award was named to show respect for George and his many contributions to NAIW (now known as IAIP). He spoke and gave seminars, etc. for many of our conferences and conventions.

The Regional Awards Committee Chair shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and email addresses of the chair and 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 chair and each of the committee members listed, not later than February 1.

Each entry shall consist of:

- A. An essay of not more than 1,000 words (include word count) with particular emphasis on the criteria listed in this section.
- B. Entry must be signed by the association president. A digital signature is acceptable.
- C. The committee shall assign the points to each entry based on the criteria/point system in item 6 of this section.
- D. Submissions are required to follow the award scoring criteria and itemized accordingly.
- E. An electronic plaque acknowledging the winning association will be posted on the Region VII web site for the fiscal year. These would be shared better than an actual plaque that transfers from president to president. Past winning associations will move to a Wall of Fame that lists the prior winners.
- F. The Award shall be presented at the Regional Conference or Annual Meeting.
- G. 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 06/30/21, winner not eligible to submit again until the 2025 award term).

The points shall be based on:

Point Value

- | | |
|--|------------------|
| 1. Formal insurance courses* sponsored or co-sponsored by the association,** | 40 points each |
| 2. Workshop/class*, seminar* or institute course* sponsored or co- sponsored by the association (IAIP or other insurance course). ** | 20 points each |
| 3. IAIP educational session* sponsored or co-sponsored by the association (i.e. Listening Leads to Learning, CLP courses, etc.) | 15 points each |
| 4. Members who instructed workshops/classes*, seminar or IAIP sessions* 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. Article (s) must include association members name as written by.** | 10 points each |
| 7. Professional designations held by members of the association (i.e., CIC, CPCU, CLU, ARM, AAI AIS, etc.) Five (5) points for each member holding a designation. | 5 pts max/member |
| 8. Member attendance at insurance related workshop/ class, course, 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. AN

IAIP SESSION is a program of at least 1 hour in length.

****Documentation is required and must accompany the submission otherwise points will not be given.**

**REGION VII JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION
ENTRY FORM**

ASSOCIATION: _____

OF MEMBERS _____ **AS OF 6/30/(insert year)**

(Must agree with IAIP membership records)

****Education Chair:** _____

Email: _____

President's Signature: _____

Email: _____

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

********If association does not have a designated Education Chair the entry form must be signed by a current association officer and the association president.

REGION VII JEFFREY NORDHAUS MEMORIAL AWARD FOR EDUCATION SCORING SHEET

Judge's Name: _____

Date _____ **Association:** _____

EDUCATION HELD	SCORE
1. Formal insurance courses sponsored or co-sponsored by the association.	40 points each _____
2. Workshop/class, seminar or institute course sponsored or co-sponsored by the Association.	20 points each _____
3. IAIP 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 IAIP 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.	10 points each _____
6. Education related articles written by an association member and published in the association's bulletin or other industry publication. Article (s) must include association members name as written by.**	10 points each _____
7. Professional designations held by members of the association (i.e., CIC, CPCU, CLU,ARM, AAI, AIS, etc.). Five (5) points for each member holding a designation	_____
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.	_____
MINIMJM points required for eligibility 100	SUBTOTAL SCORE: _____

ESSAY

Essay not to exceed 1,000 words (must be typed and word count indicated), 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 23 points). Documentation items do *not* count against the word limit

SUBTOTAL SCORE: _____

TOTAL SCORE: _____

D.ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS:

Roy Pasini was the Editor of the Underwriters Report, a monthly insurance publication. He was well known and well liked in the Insurance Industry. He covered many of our insurance conventions and was very good with publishing news articles and pictures of NAIW events. This Award was named for him because of his many acts of kindness and the wonderful Public Relations he did for NAIW (now known as IAIP) and all of the Insurance Industry.

The Regional Awards Committee Chair shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and email addresses of the awards chair and 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 chair and each of the committee members listed, not later than February 1.

Each entry shall consist of:

- A. An essay of not more than 1,000 words, word count included with particular emphasis on the criteria listed in this section.
- B. Entry must be signed by the association president. A digital signature is acceptable.
- C. The committee shall assign the points to each entry based on the criteria/point system in item H of this section.
- D. Submissions are required to follow the award scoring criteria and itemized accordingly.
- E. An electronic plaque acknowledging the winning association will be posted on the Region VII web site for the fiscal year. These would be shared better than an actual plaque that transfers from president to president. Past winning associations will move to a Wall of Fame that lists the prior winners.
- F. The Award shall be presented at the Regional Conference or Annual Meeting.
- G. 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 06/30/21, winner not eligible to submit again until the 2025 award term).

H. The points shall be based on:

	<u>Point Value</u>
1. **Public relations activities—Social Media pages such as Facebook, Linked In, and Twitter pages promoting the association and individual members’ activities. Press releases to local news media and industry publications noting members’ accomplishments. Press releases must include full article or link to article. 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 points
2. Program sponsored by the Public Relation Committee, IAIP Week event, Industry Appreciation or recognition programs, etc.	20 points each
3. CWC (Confidence While Communicating) course sponsored or co-sponsored by the association.	20 points each
4. CWC contestant in the Regional and International Speak-Off points apply individually to each level of competition.	10 points each
5. Association members speaking on insurance and/or association related subjects to other industry organizations. Participation in I-Day. Joint meetings with CPCU, RIMS, etc.	5 points each
6. Association members speaking on insurance and/or association related subjects to non-insurance organizations such as distracted driver classes for high school students, fire and/or earthquake safety for elementary students or in retirement homes. Promoting insurance careers to high school seniors.	10 points each

MINIMUM points required for eligibility 100

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. Provide links to social media pages. Press releases must include full article or link to article. A Facebook or other social media post is not to be considered as actual proof of an article or report.

**REGION VII ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS
ENTRY FORM**

ASSOCIATION: _____

OF MEMBERS _____ **AS OF 6/30/(insert year)**
(Must agree with IAIP membership records)

****Public Relations Chair:** _____

Email: _____

President's Signature: _____

Email: _____

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 entry.**

****If association does not have a designated Public Relations Chair the entry form must be signed by a current association officer and the association president.**

REGION VII ROY PASINI MEMORIAL AWARD FOR PUBLIC RELATIONS SCORING SHEET

Judge's Name _____

Date: _____ Association: _____

PUBLIC RELATIONS ACTIVITIES	POINTS	SCORE
1. Public relations activities-Social Media, press releases etc. This section is judged based on the over-all activity of the Association. A maximum of 25 points applies to this category	25 maximum	_____
2. Program sponsored by the Public Relations Committee, IAIP Week event, Industry Appreciation or recognition programs, Etc.	20 points each	_____
3. CWC (Confidence While Communicating) course sponsored or Co-sponsored by the association.	20 points each	_____
4. CWC Contestant in the Regional or International Speak-off Points apply individually to each level of competition.	10 points each	_____
5. Association members speaking on insurance and/or association Related subjects to other industry organizations. Participation In I-Day, joint meetings with CPCU, RIMS, etc.	5 points each	_____
6. Association members speaking on insurance and/or association Related subjects to non-insurance organizations	10 points each	_____
MINIMUM points required for eligibility 100 points	SUBTOTAL SCORE:	_____

ESSAY

Essay not to exceed 1,000 words (must be typed and word count indicated), which addresses the associations commitment to the public relations activities required to advance awareness of IAIP. (This score is a subjective score by the judge—maximum of 25 points)

ESSAY SCORE _____

TOTAL SCORE _____

E. E.C. SMITH, JR. MEMORIAL AWARD FOR COMMUNITY ACTION

Shirley Phillips, a long-time member of the East Bay Association, sponsored this Award as a Memorial for one of her Employers that had passed away.

1. The Regional Awards Committee Chair shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and email addresses of the awards chair and 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 chairperson 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 (include word count), with particular emphasis on the criteria listed in this section.
 - b. Entry must be signed by the association president. A digital signature is acceptable.
3. The committee shall assign the points to each entry based on the criteria/point system provided in item 9 of this section.
4. An electronic plaque acknowledging the winning association will be posted on the Region VII web site for the fiscal year. These would be shared better than an actual plaque that transfers from president to president. Past winning associations will move to a Wall of Fame that lists the prior winners.
5. The Award shall be presented at the Regional Conference or Annual Meeting.
6. Community action shall consist of activities which improve the community(s) served by the members of the local association. Activities may include but are not limited to:
 - a. Safety awareness
 - b. Support of local homeless or domestic abuse shelters.
 - c. Support of local food banks.
 - d. Fundraiser walks/marathons for recognized causes.
 - e. Clean highways.
 - f. Literacy /library support projects.
 - g. Pet adoption programs.
 - h. Service animal programs.
 - i. Return to the workforce programs.
 - j. Retirement center/ nursing home outreach.Whether something qualifies as community action will be at the discretion of the current RVP. The decision of a prior RVP cannot be overruled by a later RVP.
7. Submitting associations are required to follow the award scoring criteria and itemize accordingly.
8. 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 06/30/21, winner not eligible to submit again until the 2025 award term)

9. The points shall be based on:	Point Value
1. Association membership in the State and/or National Safety Council or Local Community Action/Involvement steering councils	10 points each
2. Community action projects sponsored by the association, full details and documentation required on each project must be included. Multiple activities for the same organization (e.g., food drive, donations for equipment, clothing donations, etc must have been held on different dates. (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 community action projects from organizations other than IAIP	20 points each
4. Community action articles and reports by the members of the association published in the local association's bulletin or other industry publication. Article(s) ** must include association members name as written by.	10 points each
5. Speakers on community action related topics at monthly meetings.**	15 points each
6. Association members speaking to other organizations on their associations community action activities or as a member of IAIP.**	10 points each

MINIMUM points required for eligibility 100

****Documentation is required and must accompany the submission otherwise points will not be given**

A Facebook or other social media post is not to be considered as actual proof of an article or report.

**ENTRY FORM
REGION VII E. C. SMITH, JR. MEMORIAL AWARD
FOR COMMUNITY ACTION**

ASSOCIATION: _____

OF _____ **AS OF 6/30(insert year)**
MEMBERS

(Must agree with IAIP membership records)

Public Relations/Community Actions Chair: _____

Email: _____

President's Signature: _____

Email: _____

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

**If association does not have a designated Public Relations/Community Action Chair the entry form must be signed by a current association officer and the association president

**REGION VII E. C. SMITH JR MEMORIAL AWARD
FOR COMMUNITY ACTION SCORING SHEET**

Judge's Name: _____

Date: _____ **Association:** _____

COMMUNITY ACTION/SAFETY RELATED ACTIVITIES **SCORE**

- | | | |
|---|----------------|-------|
| 1. Association membership in the State and/or National Safety Council or Local Community Action/Involvement steering councils. | 10 points each | _____ |
| 2. Community action 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 community action projects from organizations other than IAIP.** | 20 points each | _____ |
| 4. Community action articles and reports by the members of the association published in the local association's bulletin or other industry publication.** | 10 points each | _____ |
| 5. Speakers on community action related topics at monthly meetings.** | 15 points each | _____ |
| 6. Association members speaking to other organizations on community action related topics.** | 10 points each | _____ |

Maximum points required for eligibility 100 **SUBTOTAL SCORE:** _____

ESSAY

Essay not to exceed 1,000 words (must be typed) (include word count), which addresses the associations commitment to the safety. (This score is a subjective score by the judge — maximum of 25 points)

SCORE: _____

TOTAL SCORE: _____

****Documentation is required and must accompany the submission otherwise points will not be given**

A Facebook or other social media post is not to be considered as actual proof of an article or report.

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 VII association that has demonstrated outstanding commitment to the goals, objectives, programs and projects of IAIP.

The Regional Awards Committee Chair shall send notification and entry forms to all local associations prior to December 1. The notification letter shall also include the names and email addresses of the awards chair and 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 chair and each of the committee members listed not later than February 1.

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 06/30/21, winner not eligible to submit again until the 2025 award term).

Each entry shall consist of:

1. An essay of not more than 1000 words (include word count please) with particular emphasis on the criteria and point system listed in item 6.
2. Entry must be signed by the association president. A digital signature is acceptable.
3. Submitting associations are required to follow the award scoring criteria and itemize accordingly.
4. The judges will assign the points to each entry based on the criteria/point systems as shown in item 7 of this section.
5. An electronic plaque acknowledging the winning association will be posted on the Region VII web site for the fiscal year. These would be shared better than an actual plaque that transfers from president to president. Past winning associations will move to a Wall of Fame that lists the prior winners.
6. The Award will be presented at the Regional Conference or Annual Meeting.
7. The points shall be based on:

<u>MEMBERSHIP</u>	<u>Point Value</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 number:	
<u>*Numbers must correspond with IAIP membership listing</u>	
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:

Meetings Held	#of Members Attending	% Attendance	Speaker/Education
<hr/>			
<i>Give meeting dates</i>		<i>From Sign-in Sheets</i>	<i>#member</i>
		<i>attendees #</i>	<i>Program 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
51% - 74% = 10 pts/Mtg
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 program

Monthly association bulletin or newsletter via hard copy or internet *

Attach copies of each issue.

10 pts per 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, IAIP, 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

20 pts ea. (max. 100 pts)

(i.e., participation in Jr. Achievement, food drives, sponsoring a school, volunteer work as an association). Multiple activities for the same organization (e.g., food drive, donations for equipment, clothing donations, etc must have been held on different dates

OTHER NON-IAIP INDUSTRY INVOLVEMENT

Members who have served other industry organizations in any elected or appointed position during the past year.

5 pts per position held
(max. 50 pts)

Provide name and position for each eligible member.**

FIT INSURANCE PROFESSIONAL ACTIVITIES

Sponsor or Co-sponsor a fitness walk, run, fitness class, golf tournament or other fitness activity.

10 points each

One regular meeting based on a fitness topic or activity.

10 points each

Association's participation in a fitness activity (i.e., hikes, organized runs, walks, beach or litter clean ups, etc.) either by participating or volunteering. **

1 pt, each member/max 20 pts

SAFETY

Safety programs sponsored or co-sponsored by the association.

10 points each

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. **

(max. 50 pts)

****Documentation is required and must accompany the submission otherwise points will not be given.**

Provide links to social media pages. Press releases must include full article or link to article.

A Facebook post or other social media post is not to be considered as actual proof of an article or report.

** There are no minimum points required to be eligible for this award as the intent is for all Region VII 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 VII that recognize those areas.

ENTRY FORM ASSOCIATION OF THE YEAR AWARD

ASSOCIATION: _____

_____ AS OF 6/30/(insert year)

OF MEMBERS

(Must agree with IAIP membership records)

**Awards Contact Person: _____

Email: _____

President's Signature: _____

Email: _____

Note: Essay and documentation to cover the period from July 1 through June 30. Essay limited to 1000 words or less. Documentation items do *not* count against the word limit.

Use this form as the first page of your entry.

**If association does not have a designated Awards Chair the entry form must be signed by a current association officer and the association president.

ASSOCIATION OF THE YEAR SCORING SHEET

Judge's Name: _____

Date: _____ Association: _____

MEMBERSHIP

SCORE

Retention:

% of retention (# on both lists divided by prior year #)

Expansion:

Enter Increase or Decrease

ASSOCIATION ACTIVITY

Points for every regular meeting held

a. Points for % of member attendance at each meeting

b. Points for each outside speaker at meeting noted in (a) above

c. Points for each educational session at a meeting noted in (a) above

Monthly association bulletin or newsletter via hard copy or internet

Members actively participating in local association positions.

Executive Board

Board of Directors

Committee Chairs

EDUCATION

COMMUNITY ACTION/PUBLIC RELATIONS

Community Service

OTHER NON-IAIP INDUSTRY INVOLVEMENT

FIT INSURANCE PROFESSIONAL ACTIVITIES, SAFETY

ESSAY _____

Essay not to exceed 1000 words (must be typed) and word count included), which addresses the association's activity and commitment to IAIP. (Subjective points by judges- MAXIMUM 25 points)

TOTAL SCORE: _____

SECTION 2 - FINANCE

- A. An Awards Fund shall be established as the Region VII Award Fund, International Association of Insurance Professionals.
- 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 VII Member of the Year and Hall of Fame awards.
 2. Appropriate fee for an IAIP Certificate of Appreciation for the various association awards. (Note Certificate can be obtained from IAIP Headquarters.)
 3. Not more than \$300.00 for the transportation and hotel expense, not otherwise reimbursed, for the Regional Confidence while Communicating Speak-Off contestant to the International 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 International Convention.
 5. Not more than \$100.00 total combined postage/photocopy expense shall be reimbursable to the Regional Awards Chair 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.
 6. Not more than \$150.00 annually may be spent to reimburse for Region VII Website and Domain Maintenance.

SECTION 3 - AMENDMENTS

The Region VII Awards Committee will administer the Region VII 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 or Annual Meeting and distributed to all local associations and MAL's immediately. Should any award criteria change the new criteria will apply to the awards presented at the following year's conference.

**ACCOUNTING PROCEDURES
FOR
IAIP REGION VII
TRUST FUND ACCOUNT**

Added MARCH 20, 1999

ACCOUNTING PROCEDURES IAIP, REGION VII TRUST FUND ACCOUNT

1. All Expenses paid from this trust fund must be in accordance with the Region VII 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.

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

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: 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. The Fund shall be administered by the Regional Trustee, appointed by the Regional Vice President, for a three-year term. The Trustee shall be a former Director/Vice President. A Co- Trustee shall be appointed by the Regional Vice President to serve a coinciding term as signer in the event the Trustee is unable to perform her duties.
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
IAIP, REGION VII, TRUST FUND

March, 20_____, Through March____, 20_____

BALANCE ON HAND AS OF THE LAST ANNUAL AUDIT: (A) \$ _____

REVENUE (INCOME) Description:

\$
\$
\$
\$
\$

TOTAL REVENUE (B) \$ _____ (C) \$ _____

TOTAL ASSETS (A) + (B) =

EXPENSES Description:

\$
\$
\$
\$
\$

TOTAL EXPENSES (D) \$ _____

BALANCE IN ACCOUNT (C) – (D) = NET WORTH (E) \$ _____

Submitted by:

Trustee: _____

Dated: _____

Added 3/20/99

IAIP, REGION VII
ANNUAL AUDIT OF TRUST FUND REPORT

March, 20_____, Through March____, 20_____

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

**IAIP, REGION VII, 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: \$ _____

INCOME

FROM: _____ PHONE: _____

SOURCE OF INCOME: _____ COMMITTEE: _____

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

Added 3/20/99