



# TEXAS ASSOCIATION OF HEALTH UNDERWRITERS

## CHAPTER OF THE YEAR AWARD

(For time frame 01/01/2019 to 12/31/2019)

**Chapter Name:** \_\_\_\_\_

Large Chapter (176+ members): \_\_\_\_\_

Medium Chapter (51-175 members): \_\_\_\_\_

Small Chapter (under 50 members): \_\_\_\_\_

**Submitted by:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Chapter President's Name:** \_\_\_\_\_

**Chapter President's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

\_\_\_\_\_ **\$25 check** enclosed to return this award following the Annual Convention. Unless otherwise noted, the submission will be returned to the President's address listed below via UPS. If this Chapter has submitted more than one (1) award application, the \$25 fee applies to the return of up to three (3) applications to a single address. There is a \$5 fee per additional application (i.e., 3 additional applications to the same address will cost an additional \$15). Unclaimed applications become the property of TAHU and will be destroyed.

**Returning application(s) via UPS:**

**Chapter President's Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

\_\_\_\_\_ **NO**, we do not wish to have our application(s) returned.

To be eligible, the following events must have occurred during the period of **January 1, 2019 and December 31, 2019**. An asterisk (\*) indicates to submit documentation with this form as noted in the Awards Guidebook. No points are awarded in a category without documentation. Please arrange documentation by *Application Number*. **THE POINT SCORING SECTION OF THIS APPLICATION MUST BE COMPLETED AND SUBMITTED.**

**I. MEETINGS AND EVENTS\***

- 1. Holding a local Sales Symposium or Day of Education (must include multiple classes/speakers and provide a minimum of 5 CE credits) [*Note -- Local chapters hosting either the State Convention and/or State Golf Tournament, will receive points in this category. Count only one meeting here, other meetings should be counted as bonus points below. Must be a special event, offering multiple CE hours*]  
**1 x 50 pts =** \_\_\_\_\_
- 2. Holding regularly scheduled local membership meeting(s)  
\_\_\_\_\_ x 5 pts = \_\_\_\_\_  
**(Max of 60 points)**
- 3. Hold an annual Strategic Planning Meeting  
**1 x 25 pts =** \_\_\_\_\_
- 4. Holding regularly scheduled local Board meetings  
\_\_\_\_\_ x 5 pts = \_\_\_\_\_  
**(Max of 60 points)**

**Bonus Points for each additional sponsored meeting or event occurring during the awards period.\*** (Meetings can only be counted here as long as they are not counted under another section. Regularly scheduled meetings or special Board meetings cannot be counted here.)  
**(Max of 50 points)** \_\_\_\_\_ x 10 pts = \_\_\_\_\_

**II. LEGISLATIVE ACTIVITY\***

- 1. Providing a legislative content meeting to membership (can include monthly membership meetings as long as they are legislative programs and not just legislative updates).  
**(Max of 50 points)** \_\_\_\_\_ x 10 pts = \_\_\_\_\_
- 2. Active involvement of legislative committee, including coordination with State Legislative Council (show participation in State workshops, Leg meetings, and/or Leg conference calls)  
**1 x 25 pts =** \_\_\_\_\_
- 3. Regular interaction with legislators **(Max of 50 points)** \_\_\_\_\_ x 10 pts = \_\_\_\_\_
- 4. Attendance at TAHU Day at the Capitol **(Max of 75 points)** \_\_\_\_\_ x 25 pts = \_\_\_\_\_
- 5. Attendance at NAHU Capitol Conference **(Max of 100 points)** \_\_\_\_\_ x 10 pts = \_\_\_\_\_

**III. NEWSLETTER/WEBSITE\***

- 1. Distribution of local Chapter Newsletter  
**(Max of 60 points)** Single-page issue: \_\_\_\_\_ x 5 pts = \_\_\_\_\_  
**(Max of 120 points)** Multi-page issue: \_\_\_\_\_ x 10 pts = \_\_\_\_\_
- 2. Maintain Chapter Website **1 x 50 pts =** \_\_\_\_\_
- 3. Current email and/or fax distribution to membership **1 x 15 pts =** \_\_\_\_\_
- 4. Publish Chapter Newsletter on website **1 x 25 pts =** \_\_\_\_\_

**IV. MEDIA RELATIONS EFFORTS\***

1. Exposure of issues/events through news media. (Events should be related to Local AHU, TAHU or NAHU issues and/or events and should mention the Association of Health Underwriters – the Local, State or National chapter.) **(Max of 125 points)**

Submitted: \_\_\_\_\_ x 10 pts = \_\_\_\_\_

Published: \_\_\_\_\_ x 25 pts = \_\_\_\_\_

Aired: \_\_\_\_\_ x 25 pts = \_\_\_\_\_

2. Establishment and promotion of Speaker’s Bureau **1 x 15 pts = \_\_\_\_\_**

3. Make presentations on TAHU/NAHU health care issues to community and/or civic groups **(Max of 50 points)** \_\_\_\_\_ x 10 pts = \_\_\_\_\_

**V. MEMBERSHIP\***

1. Sponsoring chapter membership campaigns/membership contests. (Must show formal membership contest and promotion methods, with incentives to encourage membership recruitment.) **(Max of 75 points)**

\_\_\_\_\_ x 25 pts = \_\_\_\_\_

2. Net Membership gain during the award period. **(Max of 100 points)**

21% or more: **1 x 100 pts = \_\_\_\_\_**

11% - 20%: **1 x 75 pts = \_\_\_\_\_**

5% to 10%: **1 x 50 pts = \_\_\_\_\_**

**VI. PUBLIC SERVICE PROJECTS\***

1. Sponsoring chapter public service projects **(Max of 50 points)** \_\_\_\_\_ **1 x 10 pts = \_\_\_\_\_**

2. Contributions by Chapter to Charitable Organizations **(Max of 50 points)**

\$1,500+: **1 x 50 pts = \_\_\_\_\_**

\$1,000 to \$1,499: **1 x 35 pts = \_\_\_\_\_**

\$500 to \$999: **1 x 25 pts = \_\_\_\_\_**

\$100 to \$499: **1 x 15 pts = \_\_\_\_\_**

3. Contributions to TAHU Honorees Corporation (Can be Individual(s) plus Chapter contribution(s)). **(Max of 50 points)**

\$1,500+: **1 x 50 pts = \_\_\_\_\_**

\$1,000 to \$1,499: **1 x 35 pts = \_\_\_\_\_**

\$500 to \$999: **1 x 25 pts = \_\_\_\_\_**

\$100 to \$499: **1 x 15 pts = \_\_\_\_\_**

**VII. GRIP (Texas Leg Fund/TAHUPAC/HUPAC)\***

1. Chapter Contributions to TX Leg Fund (**DO NOT** count Individual contributions/donations here) **(Max of 75 points)**

\$1,500+: **1 x 75 pts = \_\_\_\_\_**

\$1,000 to \$1,499: **1 x 50 pts = \_\_\_\_\_**

\$500 to \$999: **1 x 25 pts = \_\_\_\_\_**

\$100 to \$499: **1 x 15 pts = \_\_\_\_\_**

2. Having individual members contributing \$100 or more to Texas GRIP (combined contributions to TX Leg Fund and TAHUPAC are counted)

**(Max of 100 points)**

21% or more: 1 x 100 pts = \_\_\_\_

11% - 20%: 1 x 75 pts = \_\_\_\_

5% to 10%: 1 x 50 pts = \_\_\_\_

3. Having individual members contributing \$120 or more to HUPAC

**(Max of 100 points)**

21% or more: 1 x 100 pts = \_\_\_\_

11% - 20%: 1 x 75 pts = \_\_\_\_

5% to 10%: 1 x 50 pts = \_\_\_\_

**VIII. PROFESSIONAL DEVELOPMENT/AWARDS\***

1. Members receiving a new industry designation during the award period (CBA, CBC, CEBS, CLTC, CLU, CSA, DIA, HIA, LTCP, MHP, RHU, REBC, SGS)

# of members receiving designations: \_\_\_\_ x 10 pts = \_\_\_\_

2. Continuing Education **Hours** offered by your local Chapter

(\* Note: Local Chapters hosting the State Convention will not receive points for CE hours or CE courses held at the State Convention in this section. These points are claimed in Section I1 and cannot be counted twice.)

**(Max of 50 points)**

30+ CE hours: 1 x 50 pts = \_\_\_\_

20 to 29 CE hours: 1 x 35 pts = \_\_\_\_

10 to 19 hours: 1 x 25 pts = \_\_\_\_

1 to 9 hours: 1 x 15 pts = \_\_\_\_

3. Number of CE courses sponsored by chapter

**(Max of 40 points)**

10+ courses: 1 x 40 pts = \_\_\_\_

5 to 9 courses: 1 x 30 pts = \_\_\_\_

1 to 4 courses: 1 x 20 pts = \_\_\_\_

4. Holding a Local Chapter Awards Recognition Service for chapter award recipients, new designees (i.e. RHU, REBC, SGS, etc.), GRIP (Texas Leg Fund/TAHUPAC) donors and LPRT qualifiers.

1 x 25 pts = \_\_\_\_

**IX. SPECIAL EVENT ATTENDANCE\***

1. Percentage of total member attendance at the TAHU Convention (membership #s are based on NAHU's membership report as of 12/31)

**(Max of 100 points)**

20%+ of membership: 1 x 100 pts = \_\_\_\_

15% to 19.99% of membership: 1 x 75 pts = \_\_\_\_

10% to 14.99% of membership: 1 x 50 pts = \_\_\_\_

5% to 9.99% of membership: 1 x 25 pts = \_\_\_\_

Up to 4.99% of membership: 1 x 15 pts = \_\_\_\_

2. Annual NAHU Regional meeting attendance.  
*(Max of 100 points)* \_\_\_\_\_ x 25 pts = \_\_\_\_\_

3. Attendance at TAHU-sponsored workshops by incoming officers, members, and/or chairs  
*(Max of 100 points)* \_\_\_\_\_ x 10 pts = \_\_\_\_\_

**X. CHAPTER MANAGEMENT\***

1. Proposed chapter budget for next fiscal year including sources of proposed revenue  
1 x 25 pts = \_\_\_\_\_

2. Policies and procedures authorizing who and how members are to act on behalf of the Local association  
1 x 10 pts = \_\_\_\_\_

3. Bylaws of local Chapter 1 x 10 pts = \_\_\_\_\_

4. Articles of Incorporation or Articles of Association 1 x 10 pts = \_\_\_\_\_

5. Franchise Tax Exempt letter 1 x 10 pts = \_\_\_\_\_

6. IRS Tax Exempt letter 1 x 10 pts = \_\_\_\_\_

7. Previous 12 months' Treasurer's reports 1 x 25 pts = \_\_\_\_\_

8. Costs and revenues associated with a newsletter filed on a completed form 990T (See Sections 1 and 2 below; select only one item.) *(Max of 10 points)*

1) Has the chapter filed one of the Returns of Organization Exempt From Income Tax Below: Please provide a copy of the return filed or the extension of time to file (Form 8868)

a. 990 N (gross receipts less than \$50,000) or Form 8868 1 x 10 pts = \_\_\_\_\_

b. 990 EZ (gross receipts less than \$200,000 and total assets less than \$500,000) or Form 8868  
1 x 10 pts = \_\_\_\_\_

c. 990 (all others) or Form 8868 1 x 10 pts = \_\_\_\_\_

2) Has the chapter filed a 990-T (Exempt Organization Business Income Tax Return)? This return is required if the chapter had more than \$1000 in unrelated business income for the fiscal year. If a 990-T was not required to be filed, then include a statement from the chapter's tax advisor stating the reason. If an extension of time to file (Form 8868) was filed, please provide a copy.

a. 990-T or Form 8868 1 x 10 pts = \_\_\_\_\_

b. Statement that 990-T is not required 1 x 10 pts = \_\_\_\_\_

**Subtotal Application Point:** \_\_\_\_\_

**PLEASE DO NOT COMPLETE THIS SECTION**

The following **BONUS POINTS** will be determined by the **TAHU Awards Committee** upon review of the award submission. Organization of documentation, design and appearance of the award submission:

\_\_\_\_\_ **Excellent = 50 additional pts**  
\_\_\_\_\_ **Good = 25 additional pts**  
\_\_\_\_\_ **Fair = 10 additional pts**

**Subtotal Application Point:** \_\_\_\_\_

**= TOTAL APPLICATION POINTS:** \_\_\_\_\_

Return form and award submission requirements to:

**TAHU Awards**  
c/o Nancy Dytrich  
4234 N. Summercrest Loop  
Round Rock, TX 78681

**Must be RECEIVED no later than April 5, 2021**

For questions regarding completion of this form, or other TAHU Awards matters, please contact your TAHU Awards Chair, Nancy Dytrich, at [nancy@goldstein-insurance.com](mailto:nancy@goldstein-insurance.com) and include "TAHU Awards" in the subject.

Applications must be RECEIVED no later than the close of business on the due date regardless of method of delivery. Exceptions to the submission deadline MAY be approved with TAHU board approval. Faxed or hand delivered submissions will NOT be accepted.

A copy of the submission form must accompany all submissions, with points/narrative written on the submission form. Submission form should NOT be changed, retyped or reformatted. If additional space is needed, extra sheets should be attached and numbered to correspond to submission form. Packets received without applications forms/score sheets will not be considered.

*Awards Committee use only:*

Date: \_\_\_\_\_

Reviewed by \_\_\_\_\_  
(initials) (initials) (initials)