

2009 AWARD OF EXCELLENCE

CATEGORY: AFFILIATE ACHIEVEMENT

Selection Criteria:

Listed below are the criteria for this award. Finalists will be judged based on criteria requirements. The candidate must:

- Use of BIP;
- Promotion of My Insurance Shopper
- Educational Programs;
- Attendance of affiliate officers at IBAO Convention, IBAO Annual Meeting, and Regional Meetings;
- Monthly meetings;
- Broker Promotion;
- Membership retention and recruitment;
- Special Community Project's;
- Young Brokers Council (YBC) participation;
- Public Relations & Communications.

It is important to answer **all of the questions in full while remaining concise!** Questions are to be answered in order they appear in the questionnaire. Your answers may be handwritten or typed. Please note the general presentation of your file (spelling, tone, arguments and choice of examples) as well as all other documents you consider useful to be attached to your file as they count for 10% of total points.

Formal presentation of responses will be awarded more points.

Registration Form:

This questionnaire is designed to prompt you to tell us about the activities of your affiliate. Please provide any additional information you deem necessary.

Name of Your Affiliate Association _____

If incorporated, year charter was obtained _____

Name and full address of person completing the form

Position in Affiliate _____

Fiscal Year of Affiliate Association _____

**SIGNATURE OF PERSON
COMPLETING THIS FORM** _____

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Questionnaire:

EDUCATION

- | | YES | NO |
|--|--------------------------|--------------------------|
| 1. Does the affiliate have: | | |
| a) a CAIB Coordinator? | <input type="checkbox"/> | <input type="checkbox"/> |
| b) an Education Chairperson? | <input type="checkbox"/> | <input type="checkbox"/> |
| c) workshops / IBAO education programs? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Does your affiliate have any local IBAO education programs or seminars? <i>(If yes, please provide further details)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. What specific steps have you taken to promote IBAO Professional Development, i.e. CAIB, CPIB, etc.? | | |
| 4. Does your affiliate provide instructors and / or facilitators for CAIB? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Does your affiliate provide instructors and/or facilitators to IBAO? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. What specific steps have you taken to improve the knowledge of your members? | | |

Please return all documents to:

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Please return your questionnaire no later than **August 7th, 2009** to
IBAO, attn: Maria Roscetti, 1 Eglinton Ave. E. Suite 700, Toronto, ON M4P 3A1
Tel: (416) 488-7422 INWATS: 1-800-268-8845 Fax: (416) 488-7526 Email: mroscetti@ibao.on.ca

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MEMBERSHIP

1. How many member brokers belong to your affiliate? _____
How many non-member brokers are in your territory? _____

2. What is your current membership? _____

3. What steps have you taken to ensure membership retention?
(Please attach related materials)

4. What steps have you taken to secure new members?
(Please attach related materials).

5. Please outline any other activities undertaken with respect to membership.

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YOUNG BROKERS COUNCIL (YBC)

1. What steps has your affiliate taken to become involved in the Young Brokers Council?

BROKER IDENTITY PROGRAM (BIP)

1. What steps has your affiliate taken to become involved in the Broker Identity Program?

MY INSURANCE SHOPPER

1. What steps has your affiliate taken to promote My Insurance Shopper?

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SPECIAL COMMUNITY PROJECTS

1. What special projects were undertaken by your affiliate?

INVOLVEMENT AT THE PROVINCIAL LEVEL

1. Did your affiliate president or representative attend the IBAO Convention and General Meeting and report to your affiliate? Explain.
2. Did your Affiliate President or representative attend the IBAO Annual Meeting / Regional Meetings and report to your affiliate? **YES** **NO**
3. Did you invite IBAO officers to visit your affiliate during the year? If so, please provide names, dates and topics covered.

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PUBLIC RELATIONS AND COMMUNICATIONS

1. Does your affiliate have a media spokesperson? **YES** **NO**
- If yes, please indicate _____
2. Do you have an Affiliate Political Liaison? **YES** **NO**
- If yes, please indicate _____
3. Outline the accomplishments of your Public Relations Committee.
4. Does your affiliate publicly recognize local citizens for their outstanding achievements? **YES** **NO**
5. What do you do to communicate with your member brokers?
6. What do you do to communicate with the public?

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Procedure:

- The registration form, along with all duly completed documents, must be received at the address indicated no later than August 7th, 2009.
- At the end of August, the Selection Committee will analyze the nominations received and choose three candidates per category. The winner of the “Award of Excellence” will be chosen from among these finalists.
- The three finalists will be interviewed with the members of the Selection Committee for a final interview via teleconference in September.
- The three finalists will each receive 1 complimentary ticket to the Banquet and Ball on Friday, October 23, 2009 at The Fairmont Royal York Hotel.
- Additional BIP Blended Funds will be awarded to each of the finalists.
- The winner of the “Award of Excellence” in the Category of Young Broker will be announced during the Awards segment at the Banquet and Ball on Friday, October 23, 2009 at The Fairmont Royal York Hotel.
- A mention of the winner along with a photograph will be published in the local or regional community newspaper / publication of their choice, The Ontario Broker magazine and Canadian Underwriter Magazine (November issue).

Thank you for your participation!

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