

**NATIONAL ASSOCIATION OF BENEFITS & INSURANCE PROFESSIONALS  
OHIO CHAPTER | POLICY AND PROCEDURE**

|                  |   |
|------------------|---|
| POLICY TITLE:    | Co-op Match for Local Chapters for Promotional Activity |
| CLASSIFICATION:  | Financial   |
| POLICY NUMBER:   | 2017 –0105  |
| MOTION:          | John Dodd   |
| SECONDED:        | Ben Ottley  |
| DATE SUBMITTED:  | May 8, 2017   |
| DATE APPROVED:   | May 8, 2017   |
| APPROVED BY:     | Board of Directors                                      |
| <br>             |   |
| PROPOSED UPDATE: | September 2017  |
| MOTION:          | Dave Kross  |
| SECONDED:        | John Dodd   |
| DATE APPROVED:   | September 12, 2017                                      |
| SUNSET DATE:     | May 2019  |
| <br>             |   |
| MOTION:          | Ingrid Martin   |
| SECONDED:        | Carol Conway  |
| DATE APPROVED:   | May 2019  |
| SUNSET DATE:     | May 2023  |
| <br>             |   |
| RENEWAL:         | January 19, 2023  |
| MOTION:          | Andrew Toppin   |
| SECONDED:        | Barb Gerken   |
| SUNSET DATE:     | March 2025  |

**Purpose:**

To provide a matching amount of up to \$3,000 to all local chapters in hopes of helping to support the locals with promotion activities in the upcoming year.

**Policy:**

NABIP Ohio **will match** up to \$3,000 per chapter (a total of up to \$15,000 a year) to any local that receives prior approval and submits reports and receipts for promotional activity expenses. Funds that are not used in the current calendar year will be forfeited by the local chapter and will not “rollover” to the next calendar year.

**Procedure:**

1. The local chapter must submit a proposal for use of funds to the Executive Committee at least 30 days prior to advertising deadline. The Executive Committee will approve the proposal in no more than 30 days.
  - a. A detailed description of the program/initiative that the funds are being requested for.
  - b. Copies of any supporting documentation
    - i. for example: fliers; emails, etc. promoting the program/initiative
    - ii. a copy of your budget showing this line item
2. Local Chapters may submit for a maximum of \$3000 in reimbursement per calendar year. Final approval of reimbursement will be decided on by the NABIP Ohio Executive Committee.
3. Upon Executive Committee approval reimbursement, will take place upon completion of program/initiative