

OHIO ASSOCIATION OF HEALTH UNDERWRITERS 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
Proposed Update	September 2017
MOTION:	Dave Kross
SECONDED:	John Dodd
DATE APPROVED:	September 12, 2017
SUNSET DATE:	May 2019
MOTION:	Ingrid Martin
SECONDED:	Carol Conway
DATE APPROVED:	May 2019
SUNSET DATE:	May 2023

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:

OAHU **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 OAHU Executive Committee.

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3. Upon Executive Committee approval reimbursement, will take place upon completion of program/initiative