



**YOUR CAREER PROTECTION INSURANCE**

**LOCAL ASSOCIATION ANNUAL PLAN  
For 2012 Calendar Year  
(Due January 20, 2012)**

Local IFAPAC Chair: \_\_\_\_\_ Your Term Begin Date: \_\_\_\_\_  
 Local Association: \_\_\_\_\_ End Date: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_ Name of Successor: \_\_\_\_\_  
 Email Address: \_\_\_\_\_ Successor Term Begin Date: \_\_\_\_\_  
 Fax Number: \_\_\_\_\_ End Date: \_\_\_\_\_

1. Number of Local NAIFA members as of 6/30 of previous year \_\_\_\_\_
2. What are your Local IFAPAC Fundraising Goals for this calendar year?

**GOAL 1 - Total # of Individual Contributors** \_\_\_\_\_  
 Previous Year End Total \_\_\_\_\_

Contribution Level	Number of Contributors	Contribution Amount	Total
Investor		X \$50	
Century		X \$100	
Ambassador		X \$200	
Statesman		X \$300	
Envoy		X \$500	
Diplomat		X \$1000	
Emissary		X \$2500	
Capitol		X \$5000	



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**GOAL 2 - Amount of Contributions** \$ \_\_\_\_\_  
Previous Year End Total \$ \_\_\_\_\_

**GOAL 2a - Political Contributions Goal** \$ \_\_\_\_\_  
Previous Year End Total \$ \_\_\_\_\_

**Goal 2b - Administrative Contributions Goal** \$ \_\_\_\_\_  
Previous Year End Total \$ \_\_\_\_\_

3. What is your local per capita goal? (The percentage of contributors divided by the total local membership.)  
Recommended Contributor Goal is 30%

Percentage Goal for 2012 \_\_\_\_\_%

4. What fundraising programs and strategies have you selected to achieve your goals? (See last page for ideas or contact IFAPAC Political Director, Stephanie N. Sheridan 703-770-8156 or ssheridan@naifa.org.)

Program/Strategy/Date to be implemented

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5. Do you have a Local IFAPAC Vice/Co-Chair and IFAPAC Committee to help you achieve your fundraising goals? YES NO

(Your National IFAPAC Subcommittee recommends a Local IFAPAC Committee Structure of one Committee member for every 15 members in the Local Association membership.)

Below please list the names of the Local IFAPAC Committee members, their last contribution amounts and dates, attach additional pages if necessary. **Then forward their contact information [name(s), address(es), phone number(s), email address(es) and fax number(s)] to your IFAPAC State Chair.**

1. Stephanie Sheridan - \$50 10/16/2011  
(Example)

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_



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7. \_\_\_\_\_

9. \_\_\_\_\_

8. \_\_\_\_\_

10. \_\_\_\_\_

- 6. The NAIFA Award of Excellence criteria require 100% of Board Members of the Local Association as of 12/31 to contribute to IFAPAC. What are you doing to assure 100% Local Board participation?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 7. When will you and your Committee meet with your Local Executive Board to share the current year IFAPAC goals for your local association? \_\_\_\_\_ (date)

Your National IFAPAC Subcommittee recommends the following minimum contribution guidelines:

- Local IFAPAC Chairs - \$300
- Local Board Members - \$300
- Local IFAPAC Co or Vice Chairs - \$200

We believe it is difficult to raise IFAPAC dollars without the complete support of the Local Leadership and IFAPAC Fundraising Volunteers. You must lead by example!!

Please indicate your previous year's annual contribution amount \$ \_\_\_\_\_.

- 8. Will you be showing the Dunn or Headley DVD at your local association this year?  
YES NO

The Michael Dunn and Terry Headley DVD presentations are vital tools to help facilitate NAIFA members' understanding of the importance and value of the PAC to their business and their clients. However it is not enough just to show the DVDs; you have to make a clear and defined "ask" and be there in the room with contribution forms available to collect the money.

Example of a clear ask - "Would you be willing to contribute a percentage of your gross revenues (net income) to preserve the current business environment and tax system, which largely dictates how we operate? A good rule of thumb is to contribute



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at least 1% of the gross revenues flowing into your practice from insurance-based products to IFAPAC. 1% of your gross revenue is not too much to ask for the preservation of your business and your ability to represent your clients. I give \$\_\_\_\_\_. After all -- the future of your career and the ability to serve your clients is in the balance.”

Also, you should utilize two proven methods to help facilitate fundraising at these and all meetings:

1. Display a list of current IFAPAC contributors and their annual contribution levels.
2. Provide incentives or rewards for new contributors or increased contributions.

**NOTE: The costs of incentives must be covered by the State Association’s Administrative Fund or your local association’s general fund.**

DVD Showing Scheduled

Expected Results

Date \_\_\_\_\_

Dollars \$\_\_\_\_\_ & Contributors # \_\_\_\_\_

Fundraising Programs/Ideas

1. Organize two Phon-a-Thons for your association this year to recruit new givers.
2. Work the lapsed contributor list at least quarterly.
3. 100% Board participation (required for NAIFA Award of Excellence) and committee chairs.
4. Conduct an IFAPAC meeting/day – for current NAIFA members only – with a political speaker who recognizes current IFAPAC contributors and solicits IFAPAC contributions.
5. Promote contributions via the monthly bank draft. (They will be easier to upgrade later.)
6. Solicit APIC grassroots contacts to become contributors or increase their contributions.
7. Call current contributors and ask them to “double their investment” by soliciting another member to contribute at their same amount.

\_\_\_\_\_  
Signature of Local IFAPAC Chair

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of State IFAPAC Chair

\_\_\_\_\_  
Date