

# PRESIDENT

The president has overall responsibility for the association's success by building a team of leaders to accomplish its immediate and long-term goals. By working closely with your executive committee, including the national committeeperson, association staff and president-elect, you will ensure a strong future and continuity for your association.

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## FORMULATING GOALS:

Organize a half-day planning session with your board, committee chairs and executive to discuss strategies for your year in office:

- Evaluate last year's programs. Decide which programs worked well and which programs need to be improved.
- Assess your association's resources in terms of money and member involvement and prioritize your goals.
- Write an annual action plan that determines who will do what by when and establishes monthly review and accountability methods.
- Work closely with your Membership Chair to ensure that the Membership Committee has developed a written membership plan that includes the information who, what, and when.
- Ask all board members to sign off on the plan and support it.

## BUILDING A TEAM:

Strong leadership, vision and management are necessary for the smooth operation and forward motion the association must have in order to serve the membership and to survive. As the association's leader, you need to project your excitement about the association and its goals to motivate and mobilize your leadership team. Work together with your association executive who brings experience and continuity to your association. Be sure the executive has a clear job description so that everyone's expectations are met.

Delegation is your key to success. The more members you involve in leadership, the more you will be able to accomplish. Mentor the future leaders of your association.

Assign your strongest leaders to serve on the standing committees of Government Relations, Health, Professional Development & Programs, and Membership. You may also appoint special committees or task forces to perform various functions not specifically provided for in the bylaws. You may want to consult with your president-elect and discuss naming certain individuals for a two-year term as chair. Consider appointing a co-chair to become chair the following year. This is an excellent way to orient future leaders, especially for the membership chair position.

It is helpful to conduct a board and committee chair orientation session at or before the first board meeting. Explain clearly to committee chairs your objectives for the year, their responsibilities and the resources available to them. Follow up with committee chairs regarding their responsibilities regularly. Monitor their progress relative to your strategic plan and hold them accountable. Provide encouragement and assistance as needed.

## MANAGING THE ASSOCIATION:

Submit **Officer and Committee Chair Reporting**. Failure to report this information in a timely manner may result in your association forfeiting voting privileges at the **NAIFA Career Conference and Annual Meeting**.

While the secretary is responsible for the minutes of the meetings, it is up to you to follow up with the secretary to ensure that the minutes are taken, prepared and distributed to the board immediately following each meeting. Meeting minutes are legal documents and should be taken and maintained with care. It is also your responsibility to ensure that items taken up by the board are put into action by your leadership team.

Make certain the association's bylaws are up-to-date, and that the association operates with sound business practices. See the **Governance section** of the **Leaders Center** and the **Keep It Legal Handbook** for recommendations.

Look at creating benefits for newer agents and/or members under 40. Consider appointing a **YAT** chair for programming and rethinking programs.

## REPRESENTING YOUR ASSOCIATION:

As president, you may be asked to speak on behalf of the association to the media and the community. You need to be aware of the broad industry issues as well as state and NAIFA positions and be able to articulate them for those who may not understand the insurance and financial services industry. Contact your state office or the national office for specific information regarding legislation or visit the NAIFA website at **www.naifa.org**. Frame your public statements carefully. Remember, you are NAIFA to the members and to the public.

As president, you are one of the two official representatives of your association who have voting rights in NAIFA's National Council. The other is your association's national committeeperson. The National Council meets once a year at the NAIFA conference to conduct the business of the association. You are expected to attend and vote. If you cannot attend, you should select a replacement to represent your association on your behalf at the meeting. Prior to the conference, you must notify NAIFA of the names of the delegates from your association who will be attending the conference. Be sure your association adheres to the NAIFA reporting date deadlines because failure to do so may forfeit voting rights for your association.

**EVERY MONTH**

- Conduct board or executive committee meeting.
- Follow up with Committee Chairs regarding their responsibilities.
- Preside over general membership meeting.
- Announce any upcoming deadlines.
- Check finances.**
- Discuss membership drive.
- Monitor annual action plan progress.
- Review your primary focus areas.
- Check association model calendar.
- Provide opportunities for IFAPAC solicitation.

**MARCH-JUNE**

- Meet with the current president to discuss the challenges ahead.
- Identify your leadership team for your year as president. Appoint all committee chairs.
- Set your goals for the coming year. Hold an **annual planning** meeting. Write down your plans for the year, along with the parties responsible for each area — Who will do what by when?
- Read your bylaws.
- Meet with each committee chair to review goals and objectives for the year. Work with Membership Chair to adopt a membership goal and develop a membership plan.
- Set date and prepare for Board and Committee Orientation meeting.
- Attend state presidents-elect training and ALC. It is essential that your entire team attends the ALC/LSP.
- Meet with the association executive to discuss how you will work together.

**JUNE**

- Conduct Board and Committee Orientation. Ask each committee chair and officer to come to this meeting with objectives and financial needs in writing.
- Working with the treasurer and other board members, develop a budget. Present the budget to the board and adopt it by **July 15**.
- Ask membership chair to submit membership plan.

**Deadlines**

- ▲ **June 15:** Association **Dues and Data Update** forms (including dues amount, address, and deductibility) due to NAIFA.
- ▲ **June 29:** **Officer and committee chair reporting** due
- ▲ **June 30:** Membership applications due postmarked to NAIFA for annual membership awards and official membership totals.

**JULY**

- Obtain required audit and “end-of-year” statement. Have auditor prepare **IRS Form 990 or 990-EZ**.
- Determine NAIFA conference representation and ensure proper reservations have been made.
- Make arrangement for association executive to attend Association Executives Conference.
- Ask all board members to sign off and support association membership plan.
- Approach the leadership team regarding contributions to IFAPAC.

**Deadlines**

- ▲ **July 8:** Application for **Jack E. Bobo Award of Excellence** for associations due online or postmarked to NAIFA.
- ▲ **July 15:** **Budget** for new fiscal year must be adopted.
- ▲ **Early July:** Early Registration deadline for **NAIFA Career Conference and Annual Meeting**.
- ▲ **35 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local officers and committee chairs must be reported to keep association voting privileges.
- ▲ **Plan for September: Life Insurance Awareness Month.**
- ▲ **Plan for November: Long-Term Care Awareness Month.**

**AUGUST**

- Ensure that Professional Development & Programs Chair has created a schedule for local meetings for the year.
- Turn Budget, Annual Action Plan, and Membership Plan in to state office (for local associations) or the national office (for state associations).
- Confirm plans of association representatives and national committee members to attend **NAIFA Career Conference and Annual Meeting** in September.

**Deadlines**

- ▲ **15 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local NAIFA delegate and alternate reporting deadline.

**SEPTEMBER** “*Life Insurance Awareness Month*”

- Attend the **NAIFA Career Conference and Annual Meeting**.
- Prepare one local association meeting in honor of **Life Insurance Awareness Month**.
- Review IFAPAC goals.

**OCTOBER** “*National Membership Month*”

- Report on the NAIFA conference.
- Plan for mid-year state association meeting, sales congress, etc.
- Hold health-related association meeting.
- Hold a National Membership Month event.
- Plan for November: Long-Term Care Insurance Awareness Month.**
- ▲ **October 13:** IFAPAC “Back the PAC” day

**NOVEMBER** “*Long-Term Care Awareness Month*”

- Work with President-elect to begin selecting next year’s leadership team.

**Deadlines**

- ▲ **November 15:** IRS Form 990 due for those associations required to file it. Go to [www.irs.gov/charities/index](http://www.irs.gov/charities/index) for more information.

**DECEMBER**

- Appoint LUTC and IFAPAC chair (together with president-elect).

**Deadlines**

- ▲ **December 28:** IFAPAC donations due to NAIFA. Please note that donations must be at NAIFA Headquarters on December 28. Any donations received at headquarters after December 28 will be processed for the next year.

**JANUARY**

- State President: Appoint **LILI** chair and nominate a moderator (9-12 months prior to anticipated start of institute).
- Notify NAIFA of IFAPAC chair for the year.
- Notify LUTC of LUTC chair for following association year.
- ▲ **January 30-February 1:** National PIC/PAC training meeting.

**FEBRUARY**

- Review bylaw requirements and appoint Governance Committee.
- Encourage president-elect to consider appointments for next year’s leadership team.

**MARCH** “*YAT (Young Advisors Team) Awareness Month*”

- Plan association annual meeting to be held in April, May or June. Send required written correspondence regarding meeting.
- Work with president-elect to conduct a strategic planning session.
- Review with membership chair plans for final year-end push.
- Hold a National Membership Month event.

**APRIL**

- Announce date and place for state Association Leadership Conference and state conference. Every incoming officer and committee chair should attend.
- Together with president-elect, determine representation at Association Leadership Conference and state conference.
- Finalize plans for annual meeting.
- Plan for May: Disability Insurance Awareness Month.
- Participate in the NAIFA National Online Leadership Academy.

**Deadlines**

- ▲ **Mid-April:** NAIFA Quality Award. NOTE: ALL Applicants must be members of NAIFA in good standing.

**MAY** “*Disability Insurance Awareness Month*”

- Promote attendance at the Association Leadership Conference and state conference.

**JUNE**

- Hear final membership report for fiscal year and plan for one last membership push.
- Conduct last board meeting. (Both new and old members of the Board should attend.)
- Receive final committee reports.
- Give a brief review of the year’s activities.
- Report on financial situation and schedule audit.
- Install new officers. Pass gavel to the new President.
- Discuss the state association annual meeting.

# PRESIDENT-ELECT

You have begun a two-year commitment to effective leadership of your association. Make the most of your year as president-elect to prepare for your year as president. The leadership you provide will result in a stronger and more enthusiastic association.

Apart from outlining the goals and expectations for your administrative year, special duties involve reviewing the association's bylaws, policy manuals and budgets, as well as evaluating current association activities. Your association's policy or tradition may also assign you the responsibilities of membership or program coordination. In addition, you will:

- Preside over membership meetings in the absence of the president.
- Conduct board meetings in the absence of the president.
- Hear committee reports.

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## EVALUATING CURRENT ACTIVITIES

Take the opportunity to become familiar with the association's past activities and current programs and policies in order to lead the association effectively in the future.

List all the officers and committees of the association and then ask what activities each leader undertook that actually benefited members this year. Then evaluate if the person responsible performed adequately and if finances were sufficient.

Compare the budget and actual expenditures of each activity. Whether an activity is above or below budget will influence the budget you develop for your presidential year.

Carefully evaluate the people in charge of these activities. Determine whether they met their goals. If they didn't, was it because of lack of leadership, members' participation or money? What you uncover will help you determine who are the capable and dependable members worthy of future committee appointments.

## PREPARING FOR LEADERSHIP

When planning your future activities as president, or when you require information, evaluation, technical data, consult appropriate chairs or contact the staff of your state association and NAIFA's Association Services Department.

Review state and national association resources including [NAIFA's Leaders Center](#) on the NAIFA website, [Jack E. Bobo Award of Excellence](#) online application, [NAIFA Online Membership Reporting System](#), [MemberNet](#) and other current data.

Plan to begin appointing your leadership team as early as January. Be careful to appoint the right people on your "bus" so that your team will have a great opportunity to work

together to accomplish your association goals. Complete the appointments no later than May so that you can hold a planning meeting with them in June and ensure that they plan to attend the ALC/LSP. This is your opportunity to have your entire team trained together without your having to go it alone.

Consult with your president-elect and discuss naming certain individuals for a two-year term as chair. Consider appointing a co-chair to become chair the following year. This is an excellent way to orient future leaders, especially for the membership chair position.

Make certain the association's bylaws are up-to-date. Consult the [NAIFA model bylaws](#) to ensure that your association's bylaws contain the mandatory provisions necessary to be in agreement with NAIFA Federation requirements, and that they are in line with any recent changes made by the National Council.

Finally, carefully review the president's commitments, and be prepared to assist the president and to step in as needed.

**EVERY MONTH**

- Attend board or executive committee meeting.
- Review president's monthly commitments. Support and be prepared perform duties in the president's absence.
- Support all committee activities.
- Help publicize all activities of the association.
- Help the association meet all deadlines.

**APRIL-JUNE: PREPARE FOR OFFICE**

- Meet with the incoming president to define any special responsibilities you may be delegated.
- Attend state ALC/LSP.

**JUNE**

- Assist president with the Board and Committee Orientation meeting.
- Participate in the development of a budget to be presented to the board by July 15.

**Deadlines**

- ▲ **June 15:** Association dues and data update forms (including dues amount, address, and deductibility) due to NAIFA.
- ▲ **June 29:** Officer and committee chair reporting due to state association office.
- ▲ **June 30:** Membership applications due postmarked to NAIFA for annual membership awards and official membership totals.

**JULY**

- Make reservations for NAIFA conference if you are attending.

**Deadlines**

- ▲ **July 8:** Application for Jack E. Bobo Award of Excellence for associations due online or postmarked to NAIFA.
- ▲ **July 15:** Budget for new fiscal year should be adopted.
- ▲ **Mid-July:** Early registration deadline for NAIFA Career Conference and Annual Meeting
- ▲ **35 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local officers and committee chairs must be reported to keep association voting privileges

**AUGUST**

- Confirm plans have been completed for association representatives to attend **NAIFA Career Conference and Annual Meeting** in September.

**Deadlines**

- 15 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local NAIFA delegate and alternate reporting deadline.

**SEPTEMBER** *"Life Insurance Awareness Month"*

- Attend NAIFA conference or in the absence of the president, preside over member meeting and board meeting.

**OCTOBER** *"National Membership Month"*

- Plan for mid-year state association meeting, sales congress, etc.
- Plan for IFAPAC "Back the PAC" day, October 14, 2010.

**NOVEMBER** *"Long-Term Care Awareness Month"*

- Evaluate current year's activities thus far and start thinking about what you want to keep the same and what you want to do differently.
- Begin selecting next year's leadership team.

**Deadlines**

- ▲ **November 15:** IRS Form 990 due for those associations required to file it. Go to [www.irs.gov/charities/index](http://www.irs.gov/charities/index) for more information.

**DECEMBER**

- State President Elect: Begin planning the statewide local president elect meeting to orient next year's president class.
- Appoint LUTC chair and IFAPAC chair (together with president) for the coming year. The IFAPAC year runs from January-December, and The American College will ask in January who the LUTC chair is for the coming association year.

**Deadlines**

- ▲ **December 28:** IFAPAC donations due to NAIFA from board members. Please note that donations must be at NAIFA Headquarters on December 28: Any donations received at headquarters after December 28 will be processed for the next year.

**JANUARY**

- Conduct a membership survey regarding benefits and services offered to members in preparation for the March strategic planning session.
- State president-elect: Plan Association Leadership Conference.
- Announce deadline dates for NAIFA Quality Award, and MDRT.
- Notify NAIFA of IFAPAC chair for the year.
- Notify The American College of LUTC chair or chair for following association year.

**FEBRUARY**

- State president-elect: Hold statewide local presidents elect meeting.
- Appoint membership chair by **February 1**.
- Consider appointing a professional development and programs chair now. Have the newly appointed chair begin to review the responsibilities immediately and to start planning by meeting with the current chair and organizing their committee's structure.
- Announce date and place for state Association Leadership Conference and state conference. Every incoming officer and committee chair should attend.
- Prepare for action planning session to be held in May or June.
- Tabulate results of the membership survey for action planning session.
- Review bylaw requirements and encourage president to appoint Governance Committee.
- Attend statewide presidents elect meeting.

**MARCH** *"YAT (Young Advisors Team) Awareness Month"*

- Continue work on selecting next year's leadership team.
- Assist with planning annual association meeting. Send required written correspondence regarding meeting.
- Determine representation at Association Leadership Conference and state conference.
- Review and support membership chair plans for final year-end push.
- Conduct action planning session. Invite current leadership team and any identified chairs for next association year.

**APRIL**

- State president-elect: Hold Association Leadership Conference or Local Success Planning.
- Promote attendance at the Association Leadership Conference and state conference.
- Finalize plans for association annual meeting.
- Participate in the NAIFA National Online Leadership Academy.
- ▲ **April 1:** Dues paid and applications due to NAIFA in order to qualify for NAIFA Quality Award.

**MAY** *"Disability Insurance Awareness Month"*

- Hold annual planning session in May or June. (For LSP participants this should be completed directly following your state ALC.)
- Elect new officers.

**JUNE**

- Complete committee chair appointments. **NOTE:** While your committee chairs will take office officially on July 1, it is critical that you have your team in place well in advance.
- Coordinate with secretary to report new officers and committee chairs to the state office. Remember failure to report officers in a timely manner will result in a loss of voting privileges at the **NAIFA Career Conference and Annual Meeting**.
- With the president, conduct last board meeting. (Both new and old members of the board should attend.)
- New officers installed.
- Discuss the state association annual meeting.
- Ask new membership chair to submit membership development plan by **June 30**.

# SECRETARY / TREASURER

The secretary's main objectives are to manage the association files, monitor member data and facilitate communication. The secretary and treasurer ensure that your association is operating with sound business practices. As association secretary, you are responsible for keeping the records of the association, submitting all official documents, collecting all funds, presenting a report at the association's annual meeting and maintaining true copies of the bylaws and all amendments. As association treasurer, you are responsible for overseeing your association's financial obligations and reporting to the board on financial matters. If your association has a paid association executive, the executive may carry out many of these responsibilities, if they are specified in the executive's job description.

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## MANAGING THE ASSOCIATION:

Before taking office, meet with your association executive to discuss each of your responsibilities in the administration of the association. Determine who keeps mailing lists up-to-date, responds to association correspondence and mails association-meeting notices.

A successful association is operated as any successful business. A proper financial system, therefore, is a basic necessity. As treasurer, use a system that will work best for you. A simplified "cash basis" bookkeeping system is recommended for smaller associations, although accrual accounting is also appropriate.

You should mail a copy of your association's budget and annual plan to your state association office annually and also ensure that they have a current copy of your bylaws.

Since members are critical to the success of local associations, membership administration is among a secretary's most important responsibilities. As association administrator, you should maintain a stock of local membership applications. Become familiar with the "Membership Procedures Handbook," which contains information on membership processing and reporting.

Regularly use the reports and other tools available to you, such as Codewriters, to cross-check your local records with NAIFA's. Contact the Member Service Center at 1-866-TO-NAIFA to resolve any discrepancies. It is also recommended that you use Codewriters as your local database.

## ACTING AS TREASURER:

Review the "Budgets and Finances for Associations" reference piece for additional information you need regarding financial issues. Also, be prepared to report on finances at all board meetings. If financial concerns arise at any time, alert the president immediately.

## MAINTAINING RECORDS AND REPORTING INFORMATION:

As secretary, you are responsible for taking board minutes. The purpose of minutes is to record the actions taken by the board. To keep minutes brief, record only the business transactions of meetings. Complex motions should be clearly formulated and recorded verbatim. Copies must be preserved for future reference and passed on to the new secretary immediately upon election.

You are responsible for completing the Local/State Association Dues and Data Update form, which NAIFA sends to the state and local associations in May. You are also responsible for completing the request for bank information sheet. It is essential to provide updated contact information to NAIFA, including an email address and the Dues Deductibility Worksheet.

The secretary must work closely with all committees that may have need of association records or help. Up-to-date records are essential for many of the committees.

The chairs of these committees rely upon the Secretary for membership rosters and to record official business of the association.

To keep the membership well informed on association affairs, consider using Weekly Connections, news of general interest. Available from NAIFA headquarters, the publication is distributed weekly to associations electronically.

One of the secretary's last duties in office is to work with the incoming president to report new local officers and committee chairs to the state association for the next association year. State associations report all state and local officers and committee chairs to NAIFA-National via Codewriters. The president-elect and the secretary must work closely on this joint responsibility—the president-elect by naming his or her committee chairs immediately upon election to president—the secretary by promptly reporting the officers and chairs.

**SECRETARY AREAS OF RESPONSIBILITY**

- Maintain a complete paper filing system
- Take board minutes
- File bylaws
- Arrange the required segments of the business meetings of the association
- Monitor member data
- Collect and report funds
- Facilitate communication with NAIFA
- Respond to official information requests
- Become familiar with NAIFA Membership Procedures
- Produce and distribute newsletter

**TREASURER AREAS OF RESPONSIBILITY**

(Depending on your association, some of these tasks may be assigned to the Local Executive. Make sure to coordinate appropriately.)

- Pay association bills
- Write and sign checks
- Maintain the financial records of the association
- Reconcile the association's bank balance
- Report on the association's finances
- Arrange for an annual audit or financial review
- Ensure appropriate **IRS filings** are made
- Make bond if needed
- Assist with the development of the association budget
- Report annual dues amounts to NAIFA–National.

**CRITICAL DATES**

- ▲ **June 15:** Association dues and data-update forms due to NAIFA
- ▲ **June 29:** Officer and committee chair reporting due to state association office
- ▲ **June 30:** New member applications due (postmarked) for annual official membership totals
- ▲ **July 8:** Association Award of Excellence due (postmarked)
- ▲ **October 15:** \$3 per capita administrative contribution to IFAPAC due
- ▲ **November 15:** Form 990 or annual notice due to IRS. Go to [www.irs.gov/charities/index](http://www.irs.gov/charities/index) for more information.

# NATIONAL COMMITTEEPERSON

The National Committeeperson serves as the liaison between the local and state association and the National Association of Insurance and Financial Advisors. He or she reports on matters arising from and referred to the National Council, the Board of Trustees, and NAIFA standing committees to the state association. The National Committeeperson is vital in the communications and management that binds the NAIFA Federation together. The position requires an experienced association leader who is willing and able to contribute time and effort to the association over a three-year term. As an experienced leader, the local National Committeeperson is often called on to conduct the association new member orientation program and the strategic planning process.

## LOCAL NATIONAL COMMITTEEPERSONS RESPONSIBILITIES:

- Primary liaison between the local and state association as well as NAIFA-National.
- Primary communications link between your local and state association and vice versa.
- Act as the ongoing continuity and stabilization within your local leadership board and executive committee.
- Senior advisor and consultant to your local board, executive committee, and especially, be a sounding board for your local president.
- Provide leadership in coordinating the short- and long-term goals and objectives of your local association (overall direction, and also, should play a major role in each administration's strategic plan) – assuring the deliverables to be realized at fiscal year end are achieved.
- Serve as a voting delegate to the National Council, and have a working knowledge and understanding of the key issues and any proposed bylaws amendments that come before the National Council. In addition, be instrumental in appointing alternate delegates whenever any local associations within your state are unable to send voting delegates to the National Council.
- To be our “talent scouts” within your local, in terms of recommending and nominating individuals from your respective local to the NAIFA–National Committee on Governance – this process is accomplished in concert with your local and state presidents – this function is critically important to the work of the governance committee and facilitates the appointment process by the NAIFA Executive Committee to the NAIFA standing committees and subcommittees, as well as identifies potential candidates for NAIFA trustee and secretarial positions.
- Provide a written or electronic report to the local membership following the **NAIFA Career Conference and Annual Meeting** in the association newsletter recapping the conference activities – and any amendments adopted to the NAIFA bylaws and other relevant developments arising out of the **NAIFA Career Conference and Annual Meeting**.

- Work directly with their state national committeeperson to implement new member orientation and leadership development programs at the local level.
- Responsible for managing the implementation of the Seven Touches Program, critical to membership retention and recruitment activities, as it applies to local associations (Steps 5, 6 and 7)..

## PROVIDING LEADERSHIP CONTINUITY AND STRATEGIC PLANNING

By serving a three-year term, you provide leadership and continuity to the association. This enables you to become familiar with the rhythm of the association as well as the sequence of important activities at the local, state, and national levels. Additional responsibilities include assuring that the membership campaign is active and promoting attendance at the **NAIFA Career Conference and Annual Meeting**. The national committeeperson is to assist the President-elect in completing all requirements of the Jack E. Bobo application and assure 100% attendance at your state ALC/LSP meeting. Is also to establish a monthly review of your strategic plan and establish accountability methods.

## SERVING IN THE NATIONAL COUNCIL

One of the primary duties of the national committeeperson is to represent the majority view of their membership in the NAIFA National Council and to represent NAIFA to their membership.

Fulfilling this responsibility involves attending the national conference, participating in the general sessions and state caucuses, representing the views of your association and voting accordingly. You should inform your newly elected president of his or her responsibility to attend the national conference, general sessions and state caucuses. You may assist in securing adequate funding through non-dues income sources to ensure that you and the president have the resources to attend the NAIFA Career Conference and Annual Meeting. State associations may help defray these expenses.

NAIFA bylaws provide for appointing a member in good standing to represent the association in the National Council, should the president or national committeeperson be unable to attend. In the event that no one from the association can attend, an alternate appointed by the state may represent the association.

**REPRESENTING NAIFA TO THE MEMBERS**

The national committeeperson must stay current with the NAIFA activities and communicate information on current issues to the association members. The national committeeperson is to remain alert to all state and national communications, including the Weekly Connections newsletter and email correspondences.

National Committeepersons must inform members of proposed changes in the NAIFA bylaws, candidates for office, conference promotion and other relevant news. They should also seek input from the board and members regarding proposed amendments and various NAIFA issues.

**EVERY MONTH**

- Monitor annual planning process.
- Attend board or executive committee meeting.
- Communicate news from state and national offices to your local association.
- Conduct new member orientation each month or as prescribed by your local., making sure to implement the Seven Touches Program.

**JANUARY–MARCH**

- Assist Membership Chair in meeting membership benchmark percentages.
- Assist President-Elect in preparing for Board and Committee Orientation Meeting.
- Assist Membership Chair in reaching membership goal.
- Assist in planning Leadership Development program.
- Promote state conference attendance.
- Encourage President to start Officer and Committee member selection process for next year.

**APRIL**

- Start promoting state annual meeting.
- Promote ALC/LSP and encourage attendance by all members.
- Assist in securing adequate funding to attend NAIFA Career Conference and Annual Meeting (non dues revenue).
- Monitor presentation of nominees for local office at this general membership meeting.

**MAY**

- Continue to promote ALC/LSP and state conference.
- Work with local exec in gathering names, addresses, etc. of new officers and committee members for submission to state and national.
- Assist in completing the Jack E. Bobo Award of Excellence online application for submission to NAIFA-National.
- Contact State National Committee person for feedback on recommended changes to local bylaws.
- Contact State National Committee person for upcoming issues at NAIFA Conference and if any individual is running for NAIFA trustee or Officer.
- Solicit feedback from membership on state and national issues effecting local chapter.

- Promote IFAPAC Contributions.

**JUNE**

- Assist in Board and Committee Orientation.
- Assist in completion of local officer and committee chairs for submission to NAIFA National by June 29, 2011.
- Assist membership chair in final push for membership goal.
- Coordinate with State in fund-raising for a NAIFA Candidate if your state is running someone.

**JULY**

- Register for NAIFA Career Conference and Annual Meeting.
- Officers and Committee Chairs MUST be reported 35 days prior to 1st session of National Council at the NAIFA Career Conference and Annual Meeting.
- Encourage President and other officers and members to attend NAIFA Career Conference and Annual Meeting.
- Review qualifications of Officers and Trustees running for NAIFA office. Solicit feedback from local membership.
- Report NAIFA Career Conference and Annual Meeting delegates to state a minimum of 30 days prior to conference.
- Assist in completion of Jack E. Bobo Award of Excellence online application by the July 8, 2011 deadline . (Refer to page 117 for more information).

**AUGUST**

- Continue to communicate NAIFA issues to general membership.
- Make final review of travel arrangements and lodging to the NAIFA Career Conference and Annual Meeting.
- Attend .

**SEPTEMBER**

- Attend General sessions and state caucuses
- Report back to local outcome of NAIFA elections and any bylaw or amendments enacted. This must be a written report provided in the local association newsletter.

**OCTOBER–DECEMBER**

- Assist Program Chair in seeking qualified speakers for local luncheons.
- Assist IFAPAC Chair in year end push for IFAPAC contributions.
- Monitor gathering of supporting materials for Jack E. Bobo Award of Excellence online application. (See page 117.)
- At year end meeting provide “year in review” for NAIFA issues.
- Help conduct new member orientation program.
- Assist with local association awards event.

# PROFESSIONAL DEVELOPMENT & PROGRAMS CHAIR

The Professional Development & Programs Chair is responsible for planning and executing member meetings, promoting professional career development and other NAIFA benefits, and providing members with quality education programs, such as LUTC. These education opportunities will enhance members' knowledge and ability to market and sell insurance and other financial products and services. Additionally, the Professional Development & Programs Chair should ensure that local members receive the resources they need to meet their state CE requirements and organize member-networking meetings.

Professional Development is the #1 reason why new members join their association.

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## STATE PROFESSIONAL DEVELOPMENT & PROGRAMS CHAIR RESPONSIBILITIES

- Oversee PDP chairs from all locals.
- Ensure local PDP chairs are committed and have adequate training.
- Provide local PDP chairs with state CE requirements & filing procedures.
- Coordinate with the state LUTC and Leadership in Life Institute (LILI) chairs.
- Promote the products, programs and services offered through NAIFA's Professional Development System to locals.
- Promote the Jack E. Bobo Award of Excellence.
- Understand and promote NAIFA's Programs in a Box.

## LOCAL PROFESSIONAL DEVELOPMENT & PROGRAMS CHAIR RESPONSIBILITIES

- Communicate & coordinate with membership, LUTC, and Leadership in Life Institute (LILI) chairs (if applicable).
- Work to achieve the goals of the Jack E. Bobo Award of Excellence.
- Provide professional development programs for the four practice specialties: life insurance and annuities, health and employee benefits, multiline, and financial advising and investments, for both new and experienced members.
- Provide enough seminars to fulfill state CE requirements.
- Provide sales, marketing and prospecting ideas, practice management and motivational content, and topics on industry trends.
- Take advantage of NAIFA resources including Programs in a Box, NAIFA Virtual Library, Preferred Providers programs, and the other products, programs and services offered through NAIFA's Professional Development System.
- Plan, promote and produce association meetings.

- Provide and promote educational training such as LUTC courses.
- Develop programs for the Young Advisors Team (YAT) and/or work with your local YAT chair.
- Utilize the Meeting Template and Resources.

## SETTING GOALS AND GETTING ORGANIZED

Local Professional Development & Programs Chair:

- Attend your state ALC/LSP.
- Form a committee, appoint a co-chair responsible for event logistics (refer to the Successful Meetings Guide), include Membership, YAT, LUTC and LILI Chair (if applicable)
- Attend the NAIFA Career Conference and Annual Meeting.

## HOLD A COMMITTEE MEETING IN APRIL:

- Review the local Jack E. Bobo Award of Excellence (it will outline overall expectations of your programming).
- Review your State CE requirements making sure eligible seminars are approved for CE (your State Association Executive generally files for continuing education credits).
- Develop goals/objectives for the year.
- Brainstorm new education, professional development and networking opportunities.
- Identify program topics.
- Develop a budget.
- Coordinate dates of all programs.
- Promote meetings.

Place a check near the responsibility after you have completed it. It might also be helpful to note the date the responsibility was completed so that you can see if it needs to be completed earlier next year by your successor.

**APRIL**

- Review past association programs and talk with past leaders and members to prepare ideas for the year ahead.
- Consult with **president-elect** to identify expectations.
- Select a vice-chair and committee. Consider appointing an LUTC chair to work directly with The American College. Contact The American College at 800-992-4352 or [association.marketing@theamericancollege.edu](mailto:association.marketing@theamericancollege.edu).
- Review **Jack E. Bobo Award of Excellence** online application.
- Develop goals and objectives of committee.
- Coordinate schedule of regular meetings and professional development programs sponsored by the association. Consult with the president-elect and incoming membership, government relations, YAT, and state LILI chairs as you prepare the proposed schedule for the year ahead.
- Promote the **NAIFA Quality Award Program** and April 1 deadline for submission of award application.
- Organize or help at a CE seminar at your state conference.
- Publicize and hold April meetings on financial investments and advising.
- Plan and promote May YAT event with your local YAT chair.
- Confirm arrangements for May Association Annual Meeting.
- Promote a specific **NAIFA Member Benefit**.
- Participate in the NAIFA National Online Leadership Academy.

**MAY**

- Attend state ALC.
- Attend local annual planning session.
- Coordinate with the local **YAT chair** to plan summer networking event for YAT.
- Coordinate with state LILI chair to promote Leadership in Life Institute (LILI) program.
- Promote attendance at the **NAIFA Career Conference and Annual Meeting**.
- Promote a specific NAIFA Member Benefit.

**JUNE**

- Publicize and hold June association meeting and installation of officers.
- Coordinate with state LILI chair to promote Leadership in Life Institute (LILI) program.
- Prepare final committee report to the board and make recommendations to next year's chair.
- Promote attendance at the **NAIFA Career Conference and Annual Meeting**.
- Promote a specific NAIFA Member Benefit.

**JULY**

- Hold first committee meeting.
- Submit committee annual events calendar and proposed budget to president. Be sure to include a sufficient speaker budget.
- Enlist speakers** for your fall and winter programs. Remember, speakers are your #1 drawing card.
- Submit candidate applications for Leadership in Life Institute (LILI) to state LILI chair.
- Promote attendance at the **NAIFA Career Conference and Annual Meeting**.
- Promote a specific NAIFA Member Benefit.

**AUGUST**

- Hold first committee meeting.
- Submit committee annual events calendar and proposed budget to president. Be sure to include a sufficient speaker budget.
- Enlist speakers for your fall and winter programs. Remember, speakers are your #1 drawing card.
- Submit candidate applications for Leadership in Life Institute (LILI) to state LILI chair.
- Promote attendance at the **NAIFA Career Conference and Annual Meeting**.

- Promote a specific NAIFA Member Benefit.

**SEPTEMBER** *"Life Insurance Awareness Month"*

- Enlist speakers for your CE classes.
- Give LUTC chair last minute assistance.
- Promote fall meetings and seminars.
- Announce fall seminars at your NAIFA monthly meeting.
- Publicize and hold September meeting(s).
- Confirm arrangements for October health-related meeting(s).
- Promote October YAT event. Coordinate with local YAT chair.
- Attend **NAIFA Career Conference and Annual Meeting**.
- Promote a specific NAIFA Member Benefit.

**OCTOBER**

- Put on a seminar before or after your NAIFA monthly meeting.
- Start planning your Spring CE Fair.
- Publicize and hold October health-related meeting.
- Confirm arrangements for November meeting.
- Hold YAT event. Coordinate with local YAT chair.
- Promote a specific NAIFA Member Benefit.

**NOVEMBER**

- Put on a CE program before or after your NAIFA monthly meeting.
- Publicize and hold November meeting.
- Confirm arrangements for December awards ceremony.
- Promote a specific NAIFA Member Benefit.

**DECEMBER**

- Put on a seminar before or after your NAIFA monthly meeting.
- Prepare article on education activity in your association for local or state publications, or regional trade publication.
- Assist **president** in appointing LUTC liaison or chair for following year.
- Publicize and hold December awards ceremony.
- Confirm arrangements for January legislative meeting.
- Promote a specific NAIFA Member Benefit.

**JANUARY**

- Put on a seminar before or after your NAIFA monthly meeting.
- Report programs to state professional development chair.
- Assist LUTC chairs in planning for spring enrollment campaign.
- Publicize and hold January legislative-focused meeting.
- Confirm arrangements for February meeting.
- Work with YAT chair to plan **YAT Awareness Month** activity.
- Promote a specific NAIFA Member Benefit.

**FEBRUARY**

- Put on a seminar before or after your NAIFA monthly meeting.
- Check your Award of Excellence application to see where you stand and what activities need your immediate action.
- Publicize and hold February meeting.
- Confirm arrangements for March multi-line related meeting.
- Hold YAT event. Coordinate with local YAT chair.
- Promote a specific NAIFA Member Benefit.

**MARCH** *"YAT (Young Advisors Team) Awareness Month"*

- Publicize and hold March multi-line related meeting.
- Promote NAIFA Quality Award and April 1 deadline for submission.
- Confirm arrangements for April meeting on financial investments and advising.
- Promote YAT Awareness Month and conduct related activity. Coordinate with YAT chair.
- Promote attendance at **NAIFA Career Conference and Annual Meeting**.
- Promote a specific NAIFA Member Benefit.

**APRIL**

- Participate in the NAIFA National Online Leadership Academy.

# MEMBERSHIP CHAIR

NAIFA's membership efforts rely on collective leadership from local membership chairs to state membership chairs to the National Membership Committee and its chair. Members in these positions guide NAIFA at the local, state and national level in weaving membership and membership value throughout all association activities.

In planning your membership development strategies and goals, you will want to work closely with your members, committees and board of directors to enlist their support and ensure that membership recruitment and retention is integrated into all of your association activities and efforts.

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## LOCAL MEMBERSHIP CHAIR RESPONSIBILITIES:

Your role as local membership chair is the foundation of membership activities throughout the federation. It is at the local level that members have their first contact and acquire their impression of NAIFA and the local association.

- Recruit, organize, train, and motivate local membership committee members.
- Evaluate previous membership efforts and assess the association's membership needs and trends.
- Create a **Membership Development Plan** for the year. Involve other committees and your board in completing this plan. Sample plans and guidelines are available online in the Leaders Resource Center.
- Share your Membership Development Plan with your state membership chair along with any challenges and successes throughout the year.
- Lead the membership committee in implementing the Membership Development Plan.
- Support NAIFA-National Membership Campaigns.
- Recruit and retain members using the **MemberNet**.
- Participate in **National Membership Month**.
- Conduct agency presentations and follow up on leads from the **NAIFA-National Corporate Partnerships Program** and various related campaigns.
- Support your state membership chairs in carrying out their plans and achieving measurable goals including membership recruitment and retention.
- Encourage teamwork and link membership development and local programming.
- Serve as a membership spokesperson in your local and state associations.
- Review membership status of local members.
- Implement a Field Leaders Forum twice a year

- If one does not already exist, develop and implement a membership chair succession plan. Ensure a smooth and effective transition from one year to the next through training, leadership development, accurate record-keeping and administration.
- Work with your local secretary/treasurer on membership processing procedures. For more information, please see the **NAIFA Membership Procedures Guidebook**.
- Utilize the **online membership reporting system (OMRS)** to access local membership numbers.
- Approach potential members and make the "Membership Ask."

## SPECIFIC RESPONSIBILITIES TO YOUR STATES:

Maintain regular contact with your state membership chair.

## SPECIFIC LEADERSHIP SKILLS HELPFUL TO THE POSITION:

Planning and goal setting, communication, team building, mentoring, public speaking, training, and accountability.

## TIME COMMITMENT:

Along with the time necessary to accomplish the stated responsibilities and on-going dialogue with your state membership chair, attend your state's ALC/LSP, local and state meetings and **NAIFA Career Conference and Annual Meeting**, if possible.

## AVAILABLE RESOURCES:

Local leadership and volunteers, state membership chair, National Membership Committee liaison, **NAIFA staff**, Online Leaders Resource Center and a host of membership recruitment and retention materials available online and via the NAIFA Member Service Center at **877-TO-NAIFA** (866-2432) or **membersupport@naifa.org**. Please follow-up with NAIFA-National to ensure they have your current email address.

**STATE MEMBERSHIP CHAIR'S RESPONSIBILITIES:**

Your role as state membership chair is to serve as a vital resource to local membership chairs, promote local and state membership campaigns and programs, and to ensure national membership goals are achieved.

- Implement a Field Leaders Forum. Ensure your locals do the same
- Implement NAIFAs “Seven Touches” program. Ensure your locals do the same.
- Evaluate state membership progress.
- Organize a state membership committee.
- Develop the State Membership Development Plan for the year. Ensure your locals do the same.
- Communicate with your local membership chairs your vision for the state, commitment and expectations.
- Train local membership chairs on how to run effective recruitment and retention campaigns.
- Keep local chairs motivated through on-going communication, recognition and progress acknowledgement.
- Utilize the MemberNet website for membership activities.
- Support the NAIFA-National Corporate Partnerships Program through leads distributions to local associations, follow up, agency visits and various related campaigns.
- Encourage teamwork and link membership development and local programming.
- Serve as a membership spokesperson in your state and local.
- Promote and organize a membership campaign during National Membership Month.
- If one does not already exist, develop and implement a membership chair succession plan. Ensure a smooth and effective succession from one year to the next through training, leadership development, accurate record-keeping and administration.
- Make the Membership Ask.

**SPECIFIC RESPONSIBILITIES TO YOUR STATES:**

Maintain regular contact with local membership chairs and keep them informed of state and national activities. Share successful strategies with your locals. Recognize their achievements.

**SPECIFIC LEADERSHIP SKILLS HELPFUL TO THE POSITION:**

Planning and goal setting, communication, team building, mentoring, public speaking, training, and accountability.

**TIME COMMITMENT:**

Along with the time necessary to accomplish the stated responsibilities, attend your state’s ALC/LSP and NAIFA Career Conference and Annual Meeting, if possible. Participate in consultant calls with your

National Membership Committee liaison and on-going communication with your local membership chairs.

**AVAILABLE RESOURCES:**

State leadership, local membership chairs, National Membership Committee, NAIFA staff, Online Leaders Resource Center and a host of membership recruitment and retention materials available online and via the NAIFA Member Service Center at 877-TO-NAIFA (866-2432) or [membersupport@naifa.org](mailto:membersupport@naifa.org).

**LOCAL AND STATE OUTLINE FOR A SUCCESSFUL YEAR:**

**TRAIN MEMBERSHIP CHAIRS**

- Agency Presentations
- National Membership Month
- Membership Development Plans
- NAIFA Web Site
- ALC presentations
- NAIFA MemberNet
- Online Membership Reporting System (OMRS)
- Corporate Partnerships Programs
- Listserv participation
- NAIFA Career Conference and Annual Meeting membership activities (for those who attend)
- NAIFA Weekly Connections

**COMMUNICATE REGULARLY**

- Email/listserv messages
- Follow up with NMC liaison & local membership chairs
- Recognize successes and challenges
- Solicit Best Practices

**KNOW YOUR ASSOCIATION**

- Size and demographics
- Track membership numbers — monitor membership totals on the Online Membership Reporting System
- Programs and activity
- Member recruitment and retention campaigns
- Participate in the NAIFA National Online Leadership Academy

**PROMOTE NAIFA INITIATIVES**

- National Membership Month
- Member recruitment campaigns
- Agency presentations
- Manager’s Membership Award (MMA)
- Corporate Partnerships Program
- Monthly Payment Programs
- NAIFA Career Conference and Annual Meeting
- National Membership Awards
- YAT (Young Advisors Team)
- Outstanding Member Recruiters
- Membership Benchmarks
- National Membership Conference Calls
- Online Membership Reporting System
- Field Leaders Forums

# GOVERNMENT RELATIONS CHAIR

The Government Relations Chair has overall responsibility for the association's legislative program, its Political Involvement Committee and Political Action Committee. The president or chair should assign separate chairs for APIC and IFAPAC and create APIC and IFAPAC subcommittees.

## SETTING GOALS AND GETTING ORGANIZED:

The goal of the Government Relations chair is to assure the success of NAIFA's legislative objectives at the local level. This involves:

- Identifying association leaders capable of coordinating legislative activities and gaining their commitment to serve on the Government Relations Committee.
- Organizing the committee and assigning members specific tasks and areas of responsibility.
- Enlisting the support of the association's board and leadership team.
- Ensuring that committee members have the necessary resources and support.
- Maintaining close communication with committee members and monitoring their activities.
- Appointing one person to be in charge of fundraising for **IFAPAC**.
- Appointing one person to be in charge of recruiting **APIC** contacts.

## OBJECTIVES OF THE GOVERNMENT RELATIONS CHAIR:

In the legislative arena, you are charged with:

- Knowing and understanding NAIFA's legislative and regulatory positions, both at state & federal levels.
- Communicating these positions and legislative updates to your association's board of directors and members:
  - At board and association meetings;
  - Through emailings to individual members; and
  - By arranging for issue/position and legislative updates to be printed in the association newsletter.

More detailed information on legislative duties is included in the ***Advocacy Guide***.

As IFAPAC liaison, you and your designee are charged with:

- Being responsible for seeing that the association's IFAPAC fund-raising drive reaches its goal by:
  - Setting fund-raising goals (both contribution and contributor);
  - Outlining the year's IFAPAC program before your association's board and enlisting the members' support;
  - Holding at least one association general meeting highlighting the need for political involvement and the value of IFAPAC; and
  - Conducting fund-raising campaigns, such as phon-a-thons and mailings to each member soliciting support for IFAPAC.

A detailed description of the IFAPAC liaison's duties is in the ***IFAPAC Guide***.

As APIC liaison, your support in building a network of politically involved agents and advisors is essential to the success of NAIFA's legislative program. You and your designee are charged with:

- Establishing effective methods for communicating APIC information to the association's contacts and providing appropriate feedback to the state chair.
- Involving your association members in federal legislative issues at the direction of NAIFA's Government Relations Committee, including encouraging timely responses to ***NAIFA GovAlerts*** (action alerts).
- Cultivating individual relationships with legislators by:
  - Inviting members of Congress, state legislators and other elected officials to address the membership at an association meeting;
  - Providing an occasion for state and federal candidates to address the membership; and
  - Encouraging association members to participate in the "Day at the Capitol" programs.
  - Promoting Partners for Advocacy.
  - Encourage association members to regularly meet with their legislators

More detailed information on the APIC liaison's duties is in the ***APIC Guide***.

Although the legislative process often defies a rigid timetable and flexibility is necessary in attempting to influence the process, here is a suggested calendar for the Government Relations Chair that might serve as a guide for establishing an annual cycle of legislative activity. More detailed calendars are in the [Advocacy](#), [IFAPAC](#) and [APIC Guides](#).

**JULY**

- Review the records and files of your predecessor and last year's activities. Check to make sure all local member email addresses have been forwarded to NAIFA–National.
- Plan IFAPAC fund-raising events, using Leadership Citation or Tribute to Excellence levels as benchmarks.
- Organize your committee.
- Seek direction from the association president.
- Attend the Association Leadership Conference or LSP and the workshop for government relations chairs.
- If this is an election year, review the slate of candidates to determine their positions and records concerning industry issues.
- Reach out to your association's [YAT chair](#) for assistance in gaining new legislative contacts and new IFAPAC contributors.
- Appoint a vice chair in charge of [IFAPAC](#).
- Appoint a vice chair in charge of [APIC](#).
- Familiarize yourself with state and federal laws covering political action committees.

**AUGUST**

- Review the APIC contact files and begin to update and expand the list.
- Review the IFAPAC fund-raising plan and benchmarks. Adjust the plan accordingly for remainder of the year. Ask the IFAPAC Vice-Chair what his/her plans are for “Back the PAC” day.
- Finalize the year's activities and submit your budget to the treasurer.
- Make sure your association forwards its administrative contribution to National IFAPAC.
- Remind the APIC chair to introduce the [Partners For Advocacy Program](#) to new NAIFA members.

**SEPTEMBER** *“Life Insurance Awareness Month”*

- Attend the [NAIFA Career Conference and Annual Meeting](#) and committee meetings on government relations and legislation. Review the programs for other sessions pertaining to legislation and regulation.
- Work with the program chair to develop at least one annual program concerning association legislative issues and invite your legislators to attend and speak.
- If this is an election year, invite local candidates to speak at an association gathering.

**OCTOBER** *“Oct. 13 Back the PAC Day”*

- Review legislative issues affecting members.
- Encourage members to become involved in politics and to vote.
- Plan a year-end fund-raising program for IFAPAC. Collect contributions.
- Check the Bobo Award criterion to ensure that all IFAPAC requirements are completed by December 31.

**NOVEMBER**

- Make an updated report to the membership on fundraising and APIC contact recruitment.
- Make a list of newly elected candidates (if it's an election year) and publicize the need for new NAIFA member contacts for these representatives.

**DECEMBER**

- Evaluate your association's IFAPAC fund-raising results to date. Launch your year-end effort to achieve [IFAPAC Leadership Citation or Tribute to Excellence](#) levels of performance.
- Federal and state legislators are most likely to be home for the holidays. It is a good time to meet with them and renew your relationship or introduce yourself.

**JANUARY** – *“Annual IFAPAC/APIC Training Meeting”*

- Plan IFAPAC fund-raising programs for the year. Plan now to achieve IFAPAC Leadership Citation or Tribute to Excellence level performance for the coming year.
- Alert membership of legislative activities.
- Invite the state YAT chair to participate fully in all advocacy programs.
- Attend the Annual IFAPAC/APIC Training Meeting.

**FEBRUARY/MARCH**

- Survey the association membership for state or federal issues of special concern.
- Organize a political action education course.

**APRIL**

- Review legislative bulletins, educate membership and update legislative files.
- Volunteer to support the IFAPAC fund-raising programs.

**MAY/JUNE**

- Have your final committee meeting to evaluate association activities and make a final report. Make recommendations for the next association year and pass on all files and materials to the new chair.
- Encourage newly appointed committee members to attend the state ALC or LSP.
- Check that your state association has budgeted for the State APIC Chair's travel expense to next year's January training meeting.

# HEALTH CHAIR

As a result of the expansion of health and employee benefit offerings to all NAIFA members through the dissolution of AHIA as an unincorporated conference of NAIFA, the duties and responsibilities of the Health Chair have been updated.

Health chairs serve as the health and employee benefits “experts” within each state and local association, and are integral players in ensuring that NAIFA members are best served on these issues.

State and local health chairs share common responsibilities in many areas. The state chair is responsible for coordinating the multitude of activities within the entire state, working with the national leaders, and communicating with the local chairs.

The local chairs are responsible for planning and implementing initiatives at the local association level. Effective communication between local chairs, state chairs and national leadership is necessary in order to best meet the needs of the membership.

The Health Chair is appointed by the state or local NAIFA president for each association.

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## HEALTH CHAIR ROLES & RESPONSIBILITIES:

The state and local Health Chairs play a unique role within the NAIFA associations as they will often need to collaborate and work with other association leaders to ensure that health and employee benefits are included in all of the following areas:

1. Legislative Advocacy and Public Relations
  - Serve as a resource for association members concerning legislative activity that impacts health and employee benefits issues.
  - Assist in tracking and communicating health-related legislative issues to NAIFA members.
  - Assist your association’s APIC and IFAPAC chairs to ensure a strong, active grassroots network within your association.
2. Educational Programming and Professional Development
  - Collaborate with your **Professional Development and Programs chairs** to ensure that quality health-related programming will be included in the calendar for the year.
  - Become familiar with the health and employee benefits-related products and services offered by NAIFA and encourage your association members to take advantage of these services.
3. Membership Development and Retention
  - Collaborate with your association’s **Membership Chair** to ensure that health and employee benefits agents are being approached to join NAIFA.
  - Assist membership marketing campaigns by highlighting information on the health and employee benefits services provided by NAIFA.

# YAT (YOUNG ADVISORS TEAM) CHAIR

NAIFA created the Young Advisors Team (YAT) for members who are 40 years of age and under, or in their first five years in the business. The mission of the Young Advisors Team (YAT) is to SOW the value of membership with new and young advisors, so they are empowered to SURVIVE their first years in the business, to GROW into involved NAIFA members and become successful advisors who THRIVE in the industry and our association.

As YAT Chair, you will want to work closely with your Local President, Local Executive and Membership Chair to organize activities and events that demonstrate the value of YAT and of NAIFA membership

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## LOCAL YAT CHAIR RESPONSIBILITIES:

- Identify YATs in your area for inclusion in YAT programming. If you are not able to determine who is a YAT, contact the national YAT staff at [yat@naifa.org](mailto:yat@naifa.org) to get a listing of YATs in your area. To be identified as a YAT, date of birth and license year must be included in a member's profile. Please have your YATs send this information to [membersupport@naifa.org](mailto:membersupport@naifa.org).
- Make sure the YAT Chair contact information for your local is correct on the YAT webpage, [www.naifa.org/yat](http://www.naifa.org/yat). If the information is incorrect, contact YAT at [yat@naifa.org](mailto:yat@naifa.org).
- Plan YAT focused activities to occur on a bimonthly, or at the very least, quarterly, basis. For event ideas, check the YAT webpage.
- Nominate outstanding YATs for the YAT Leader of the Year Award. For application and details, visit [www.naifa.org/yat](http://www.naifa.org/yat).
- Plan and execute an event in March for **YAT Awareness Month**. This can be done in conjunction with the **National Membership Month** that also occurs in March. Work with your local leaders and **Membership Chair** for joint activities.
- Promote the **NAIFA Career Conference and Annual Meeting** and the YAT activities that occur at the Conference.
- Promote the **YATPAC** initiative to YATs in your local and plan an event around the importance of advocacy.
- Check the YAT webpage, [www.naifa.org/yat](http://www.naifa.org/yat) often for the latest news on YAT programs and initiatives. You can also get ideas for events to host in your local by seeing what other local associations are doing.
- Fulfill the revised goals of YAT by recruiting those within their first five years in the business, regardless of age, for YAT events.
- Make sure that the YATs in your local receive **YAT Chat**, a monthly online feature containing tips and ideas for the young advisor. All YATs have access to this feature.
- Hold education events using NAIFA's "Programs in a Box" (PIB). A list of PIBs available can be found in the Online Leaders Training Center at [www.naifa.org/leaders/training.cfm](http://www.naifa.org/leaders/training.cfm).
- Work with your Membership Chair on National Membership Months (each March and October) to help recruit young and new advisors to NAIFA.
- Work with your leadership to welcome new members into the association (especially YATs), determine their interests and encourage them to become active volunteers for NAIFA based on the interests they expressed.
- Solicit **Best Practices** and submit to National YAT by sending narratives to [yat@naifa.org](mailto:yat@naifa.org).
- Foster social networking with your YATs by encouraging them to participate in the YAT LinkedIn group and Twitter feed. For more information on these initiatives, direct your YATs to [www.naifa.org/yat](http://www.naifa.org/yat).
- Work with the leadership in your area to promote *Advisor Today's* "Four Under Forty" nomination process.