

# President-Elect

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*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 the **Leaders Resource Center** on the NAIFA website, Association Award of Excellence application, NAIFA Membership Total Reports 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 the plan to attend the ALC. 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.

**JUNE**

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

**Deadlines**

- ▲ **June 30:** Membership applications due postmarked to NAIFA for annual membership awards and official membership totals.
- ▲ **June 30:** Application for Jack E. Bobo Award of Excellence for associations due postmarked to NAIFA.
- ▲ **July 1:** Officer and committee chair reporting due

**JULY**

- Make reservations for NAIFA convention if you are attending.

**Deadlines**

- ▲ **July 1:** Officer and committee chair reporting due to state office.
- ▲ **July 15:** Budget for new fiscal year should be adopted.
- ▲ **July 15:** Association dues and data update forms (including dues amount, address, and deductibility) due to NAIFA.
- ▲ **Mid-July:** Early registration deadline for NAIFA Convention and Career Conference
- ▲ **35 days prior to the first session of the National Council at the NAIFA Convention and Career Conference:** 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 Convention and Career Conference** in September.

**Deadlines**

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

**SEPTEMBER “Life Insurance Awareness Month”**

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

**OCTOBER “AHIA Health Month”**

- Plan for mid-year state association meeting, sales congress, etc.

**NOVEMBER**

- 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.

**DECEMBER**

- State President Elect: Begin planning the statewide local president elect meeting to orient next year’s president class.
- Appoint LUTC chair and IFAPAC liaison (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 liaison or chair is for the coming association year.

**Deadlines**

- ▲ **December 31:** IFAPAC donations due to NAIFA from board

members. Please note that donations must be at NAIFA Headquarters on December 31. Any donations received at headquarters after December 31 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 NQA, NSAA, NMSA, HSQSA, and MDRT.
- Notify NAIFA of IFAPAC liaison for the year.
- Notify LUTC of LUTC liaison or chair for following association year.

**FEBRUARY**

- State president-elect: Hold statewide local presidents elect meeting.
- 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 convention. 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 Month”**

- Continue work on selecting next year’s leadership team.
- Appoint membership chair by **March 31**.
- Assist with planning annual association meeting. Send required written correspondence regarding meeting.
- Determine representation at Association Leadership Conference and state convention.
- 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.
- State president-elect: Attend **National Leadership Conference** at NAIFA–National.
- Promote attendance at the Association Leadership Conference and state convention.
- Finalize plans for association annual meeting.

**MAY**

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

**Deadlines**

- ▲ **May 1:** Dues paid and applications due to NAIFA in order to qualify for industry awards (NQA, NSAA, and NMSA).

**JUNE**

- Complete committee chair appointments. **NOTE:** While your committee chairs will take office officially on July 1, it is critical that you plan this support group 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 Annual Convention and Career Conference**.
- 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 action plan by **June 30**.