

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.

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.

- Implement NAIFA's "SOAR" program.
- Review membership status.
- Recruit, organize, train, and motivate local committee members.
- Evaluate previous membership efforts and assess the association's membership needs.
- Create a Membership Development Plan for the year. Involve other committees and your board in completing this plan. Plans are available in the Leaders Resource Center.
- Lead the membership committee in implementing the Membership Development Plan.
- Share your Membership Development Plan with your state membership chair along with any challenges and successes throughout the year.
- Support NAIFA National Membership Campaigns.
- Conduct agency presentations and follow up on leads from the NAIFA–National Industry Relations 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.
- Implement NAIFA's "Seven Touches" program in coordination with your state association.
- Serve as a membership spokesperson in your local and

state associations.

- 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 Handbook*.

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, meetings and NAIFA convention, if possible.

Available resources:

Local leadership and volunteers, State Membership Chair, NAIFA staff, Leaders Resource Center on the NAIFA website 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**. In addition, the NAIFA Membership Committee publishes *MembershipFOCUS*, a publication filled with membership ideas and Best Practices. 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 campaigns and programs, and ensure membership goals are achieved.

- Implement NAIFA’s “SOAR” program. Ensure your locals do the same.
- Implement NAIFA’s “Seven Touches” program. Ensure your locals do the same.
- Evaluate state membership progress.
- Organize a state membership committee.
- Develop the state Membership Development Plan 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 plans.
- Keep local chairs motivated through on-going communication, recognition and progress acknowledgement.
- Communicate at least monthly with your state’s National Membership Committee liaison.
- Support the NAIFA National Industry Relations 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.
- Communicate with your National Membership Committee liaison and fellow committee members, as needed and expected.
- 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.

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 states ALCs and NAIFA convention, 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, NAIFA staff, Leaders Resource Center on the NAIFA website 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**.

Local and State Outline for a Successful Year:

TRAIN MEMBERSHIP CHAIRS

- Membership Powerpoint
- Membership videos
- Membership Development Plans
- SOAR strategy
- Seven Touches program
- NLC materials
- ALC presentations
- Membership development plans
- Website resources
- MembershipFOCUS* newsletter
- Listserv participation
- NAIFA Convention membership activities (for those who attend)
- NAIFA *Insider*

COMMUNICATE REGULARLY

- Email/listserv messages
- Follow up
- Recognize successes and challenges
- Solicit *Best Practices*

KNOW YOUR ASSOCIATION

- Size and demographics
- Track membership numbers — monitor membership totals on the Dues Activity Report.
- Programs and activity

PROMOTE NAIFA INITIATIVES

- National Membership Day (October 26, 2006 and March 8, 2007)
- Telemarketing
- Member recruiter campaigns
- Agency presentations
- Industry-relations program
- Programs In A Box*
- NAIFA Convention and Career Conference
- LIFE opportunities
- MDRT speaker series
- YAT (Young Advisors Team)
- SOAR
- Seven Touches Program
- Membership Benchmarks
 - 15% of goal by September, 30 2006
 - 60% of goal by January 15, 2007
 - 80% of goal by March 31, 2007
 - 100% of goal by June 30, 2007