

National Committeeperson

The National Committeeperson serves as a liaison between the 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 NAIFA 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 association strategic planning process.

Providing Leadership Continuity and Strategic Plan

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. You should assist in coordinating long-term objectives of the association with the short-term objectives like strategic planning of each administration. Ongoing assignments include assuring that the membership campaign is active and promoting NAIFA Convention attendance. Set an example by attending the state Association Leadership Conference and encourage your president-elect to attend the state president-elect conference.

The National Committeeperson is also responsible for planning leadership development programs to help reach the association's goals. Your responsibility is to help the president-elect complete all requirements to establish the association's goals, which include: helping the PE fill his or her "bus," assuring 100% ALC attendance, establishing hedgehog and primary focus areas, establishing monthly review of the plan and establishing accountability methods.

Serving in the National Council

The primary duty of the National Committeeperson is to represent the majority view of the membership of their associations in the NAIFA National Council and to represent NAIFA to the membership of their association.

Fulfilling this responsibility involves attending the National Convention, 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 Convention, 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 Convention. 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 from another association within the state may represent the association.

Local associations must report their NAIFA Convention delegates and alternates to NAIFA prior to 30 days before the convention. If this deadline is missed, the right to appoint delegates is exclusively transferred to the state association. It is recommended that state and local associations appoint a delegate and an alternate in the case of an emergency.

In 1998, the National Council voted to amend the NAIFA bylaws to authorize a state association to select any of the alternate voting delegates appointed by that state, or any of its locals, to vote in place of any absent voting delegate from that state.

Representing NAIFA to the members

The national committeeperson must stay current with NAIFA activities and be prepared to communicate information on issues of the moment to local association members. Apart from attending state and national association meetings, anyone occupying this office should remain alert to bulletins and other communications from the state and national offices, such as *Insider*, *Frontline* and other communiques. Make sure that NAIFA has your current email address on record to assure that you receive all communications.

National committeepersons must inform members of proposed changes in the NAIFA constitution and bylaws, candidates for office, convention promotion and other relevant news. They should also seek input from their association boards and members regarding their views on NAIFA issues.

As delegates, national committeepersons must report to the association membership after each NAIFA Convention and provide a written report in the association newsletter.

National committeepersons are expected to assist their association's officers and standing committee chairs in communicating with NAIFA officers, committee chairs and staff. One way to ensure communication to NAIFA of local association activities is to confirm local submission of application for the Award of Excellence by **June 30**.

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.

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 convention attendance.
- Encourage President to start Officer and Committee member selection process for next year.

APRIL

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

MAY

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

JUNE

- Assist in Board and Committee Orientation.
- Assist in completion of Award of Excellence by **June 30th deadline**.
- Assist in completion of local officer and committee chairs for submission to state and national by **July 1 deadline**.
- 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.
- Assist in new board member orientation.

JULY

- Register for **NAIFA Convention and Career Conference**.
- Officers and Committee Chairs **MUST** be reported **35 days prior to 1st session of National Council** at the NAIFA Convention.
- Encourage President and other officers and members to attend NAIFA Conference.
- Review qualifications of Officers and Trustees running for NAIFA office. Solicit feedback from local membership.
- Report NAIFA Convention delegates to state a minimum of 30 days prior to convention.

AUGUST

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

SEPTEMBER

- Attend General sessions and state caucuses
- Report back to local outcome of 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 membership.
- Monitor gathering of supporting materials for Jack E. Bobo Award of Excellence.
- At year end meeting provide “year in review” for NAIFA issues.
- Help conduct new member orientation program.
- Assist with local association awards event.