

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.

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, Professional Development & Programs, Membership and AHIA. You may also appoint special committees or task forces to perform various functions not specifically provided for in the bylaws. You might 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:

Send completed Officer and Committee Chair Report forms to your state association by **July 1**. Your state will report to them to NAIFA electronically. Failure to report this information in a timely manner may result in your association forfeiting voting privileges at the **NAIFA Annual Convention and Career Conference**.

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 Resource 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 convention 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 convention, you must notify NAIFA of the names of the delegates from your association who will be attending the convention. 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 hedgehog and primary focus areas.
- LSP Plan Report to state liaison.
- Check association model calendar.

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.
- 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 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

- Check finances. Obtain required audit and "end-of-year" statement. Have auditor prepare IRS Form 990 or 990-EZ.
- Determine NAIFA convention 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 1:** Officer and committee chair reporting due
- ▲ **July 15:** Budget for new fiscal year must 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.
- ▲ **Plan for September 1: Life Insurance Awareness Month.**

AUGUST

- Ensure that Professional Development & Programs Chair has created a schedule for local meetings for the year.
- Turn Budget, Annual 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 person 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 the **NAIFA Convention and Career Conference**.
- Prepare one local association meeting in honor of **Life Insurance Awareness Month**.
- Review IFAPAC goals.

OCTOBER "AHIA Health Month"

- Report on the NAIFA convention.
- Plan for mid-year state association meeting, sales congress, etc.
- Hold health-related association meeting.

NOVEMBER

- 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.

DECEMBER

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

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

- State President: Appoint LILI chair and nominate a moderator (9-12 months prior to anticipated start of institute).
- Notify NAIFA of IFAPAC liaison for the year.
- Notify LUTC of LUTC chair for following association year.
- Request update from health chair on AHIA Award of Excellence.

FEBRUARY

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

MARCH "YAT Young Advisors 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.

APRIL

- Announce date and place for state Association Leadership Conference and state convention. Every incoming officer and committee chair should attend.
- Together with president-elect, determine representation at Association Leadership Conference and state convention.
- Finalize plans for annual meeting.

MAY

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

Deadlines

- ▲ **May 1:** Applications due to NAIFA for industry awards (NQA, NSAA, and NMSA). **Note:** all applicants must be members of NAIFA in good standing.

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.