

# Professional Development & Programs Chair

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*The Professional Development & Programs Chair is responsible for planning and executing member meetings, promoting professional career development 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 such as YAT events and awards ceremonies.*

*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 chair.
- Promote educational resources, such as Horizons and the Financial Services Specialist (FSS), to locals.
- Promote the Jack E. Bobo Award of Excellence (go to the Leaders Resource Center at [www.naifa.org](http://www.naifa.org)).
- Understand and promote NAIFA's Programs-in-a-Box.

## Local Professional Development & Programs Chair Responsibilities

- Communicate & coordinate with membership and LUTC (if applicable) chairs.
- Work to achieve the goals of the Jack E. Bobo Award of Excellence.
- Provide professional development for four practice specialties, for both new and experienced members.
- Provide enough seminars to fulfill state CE requirements.
- Provide sales ideas, motivational content and topics on industry trends.
- Take advantage of Programs in a Box and the MDRT Speakers Bureau (go to go to the Leaders Resource Center at [www.naifa.org](http://www.naifa.org)).
- Plan, promote and produce association meetings.

- Provide educational training such as Horizons and/or courses for LUTC or the Financial Services Specialist (FSS).
- Develop programs for the Young Advisors Team (YAT) and/or work with your local chair.

## Setting Goals and Getting Organized

### Local Professional Development & Programs Chair:

- Attend your state ALC.
- Form a committee, appoint a co-chair responsible for event logistics (refer to *How to Have a Successful Meeting Handbook*), include Membership and LUTC Chair (if applicable).

### Hold a committee meeting in July:

- 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 opportunities.
- Identify program topics.
- Develop a budget.
- Coordinate dates of education 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.

**MAY-JUNE**

- Attend state ALC.
- Attend local annual planning session.

**JULY**

- Review past association programs and talk with past leaders and members to prepare ideas for the year ahead.
- Consult with president to identify expectations.
- Select a vice-chair and committee. Consider appointing an LUTC liaison to work directly with The American College.
- Review Award of Excellence application.
- Review *Professional Development & Programs Chair Annual Planning Guide*.
- Develop goals and objectives of committee.
- Hold first committee meeting.
- Coordinate schedule of regular meetings and professional development programs sponsored by the association. Consult with the president, member benefits, government relations and AHIA chairs as you prepare the proposed schedule.
- Enlist speakers for your fall and winter programs.  
**REMEMBER:** speakers are your #1 drawing card.
- Submit committee report and proposed budget to president. Be sure to include a sufficient speaker budget.
- Hold summer YAT networking event to encourage interest and participation.

**AUGUST**

- Enlist speakers for your winter and spring programs.  
**REMEMBER:** speakers are your #1 drawing card.
- Promote schedule of professional development activities such as LUTC classes, CE and professional development seminars.
- Publicize first meetings of the association year.
- Submit article(s) on professional development and programs to your newsletter editor. Use testimonials from current and past students/attendees.
- Hold summer YAT networking event to encourage interest and participation.

**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).

**OCTOBER "AHIA Health Month"**

- 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.

**NOVEMBER**

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

**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.

**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.

**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.
- Promote NAIFA Industry Awards.
- Hold YAT event.

**MARCH "YAT Young Advisors Month"**

- Publicize and hold March multi-line related meeting.
- Promote NAIFA Industry Awards.
- Confirm arrangements for April meeting on financial investments and advising.

**APRIL**

- Promote NAIFA Industry Awards and May 1 deadline for submission of award application.
- Organize or help at a CE seminar at your state convention.
- Publicize and hold April meetings on financial investments and advising.
- Promote May YAT event.
- Confirm arrangements for May Association Annual Meeting.

**MAY**

- Publicize and hold May YAT event.
- Publicize and hold May Association Annual Meeting.
- Contact NAIFA with questions concerning your Award of Excellence application material. Provide back up materials needed for the Award of Excellence application to your president or executive in time for them to postmark application no later than June 3.
- Confirm June Association Meeting and installation of officers.

**JUNE**

- Publicize and hold June association meeting and installation of officers.
- Prepare final committee report to the board and make recommendations to next year's chair.