



2019 Local Chapter Action Plan

The Annual Local Action Plan provides valuable information on your chapter's plans for the year in seven key areas. The information in this report will help NAIFA identify gaps so we can develop chapter resources, tools and training to meet the needs of our chapter leaders and field staff. This report will be shared with your state chapter.

- Section 1. Advocacy
- Section 2. Membership
- Section 3. Programs/Professional Development
- Section 4. Communications/Marketing
- Section 5. Volunteers
- Section 6. Finance
- Section 7. Governance

If, while completing this report, you identify areas where you need immediate support to ensure your chapter's success, please contact your state executive or state president for assistance. If they are not able to help, please contact Michele Grassley Clarke, Vice President of Member and Chapter Services, 703-770-8219, mgc@naifa.org, to schedule a planning session with your chapter board.

INSTRUCTIONS: Submitting this report is required to remain compliant as a NAIFA Chapter. Please submit only one report for your chapter. You do not have to complete the entire report in one session. The system allows you to save your report, obtain a unique URL and return later to submit additional information. If you opt to complete the report in more than one session, please make sure you finish the report and submit it by the deadline.

DEADLINE: Thursday, January 31, 2019

Local Chapter *

Submitted by: *

First Name

Last Name

Submitter's Email *

A copy of this report will be sent to this email address upon completion of the report.

[Save and Resume Later](#)

Next

Progress



Section 1. Advocacy

of State Day on the Hill Attendees *

10

How many chapter members will attend the state Day on the Hill? (if the state will not host a Day on the Hill this year, enter "0".)

State Day on the Hill Reimbursement *

Yes No

Will your chapter reimburse or subsidize any members (including board members) attending your state's Day on the Hill? (If the state will not hold a Day on the Hill, select "No".)

of NAIFA Congressional Conference Attendees *

5

How many members from your chapter are expected to attend the 2019 Congressional Conference?

Congressional Conference Subsidy *

Yes No

Will your chapter reimburse or subsidize any members (including board members) attending the 2019 Congressional Conference?

Congressional Conference Subsidy Description *

We have budgeted \$2,000 and plan to...

Provide the amount you've budgeted and a brief description of your chapter's Congressional Conference subsidy and/or reimbursement program (i.e., who is eligible for the subsidy/reimbursement, amount of subsidy/reimbursement, etc.).

PAC Goal *

\$ 20000

What is your chapter's 2019 IFAPAC Fundraising Goal?

PAC Contributors Goal *

50

What is your chapter's goal for the number of members who will contribute to IFAPAC in 2019 (contributor goal)?

Budgeted PAC Admin Fund Chapter Contribution *

300

How much has your chapter budgeted to contribute to IFAPAC's Administrative Fund in 2019?

PAC Committee Size *

2

Other than the chair and members of your chapter board, how many members are on your PAC Committee?

Grassroots Involvement (formerly APIC)

In-District Meetings/Events with Federal Legislators *

Yes No

Is your chapter planning to coordinate a meeting or participation in a town hall event with any Member(s) of Congress at least once this year while he/she is in the state?

Meetings/Events with State Legislators *

Yes No

Other than at the state's Day on the Hill is your chapter planning to host or participate in any meetings with state legislators in 2019?

Plans to Engage First Timers and YATs in Grassroots Activities

We plan to...

Describe any plans you have to encourage participation by first-timers and young advisors in grassroots activities.

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 2. Membership

New Member Goal*

15.00

What is your goal for new members recruited this year?

Retention Goal*

85%

What is your goal for membership retention in this year (i.e., 85%)?

Membership Committee Size*

2

Other than the chair and members of your local board, how many members are on your Membership Committee?

Recruitment Activities*

Recruitment Activities include...

Please describe recruitment activities you have planned.

Retention Activities*

Retention activities include...

Please describe retention activities you have planned.

New Member On-boarding Activities*

New member on-boarding activities include...

Please describe how your chapter plans to on-board (welcome, engage, provide orientation) new members.

Member Recognition*

We plan to...

Describe any plans you have to recognize new members, long-time members, NAIFA Quality Award recipients and/or members receiving certifications or designations.

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 3. Programs/Professional Development

NAIFA Programs

Leadership in Life Institute (LILI) *

How many members from your chapter will graduate from LILI in 2019? (If none, enter 0.)

LACP *

What is your goal for how many members from your chapter will receive the LACP certification in 2019? (If none or unknown, enter 0.)

LUTCF *

What is your goal for how many members from your chapter will earn the LUTCF designation in 2019 (either from hosted classes or online. If none or unknown, enter 0.)

Hosting an LUTC Class *

Yes No

Is your chapter planning host any LUTC classes in 2019?

Skill Builders *

Time Management Workshop Prospecting Workshop Business Succession Planning Workshop None

Please select the Skill Builders workshops your chapter is planning to offer in 2019.

NAIFA Performance + Purpose Conference

P+P Attendance Goal *

What is your goal for how many members from your chapter will attend the NAIFA P+P Conference? (If none or unknown, enter 0.)

Chapter Executive Attending P+P *

Yes No

Will your chapter executive attend P+P?

P+P Subsidy *

Yes No

Will your chapter reimburse or subsidize any members (including board members) attending the 2019 P+P Conference?

P+P Subsidy Budget *

How much has your chapter budgeted for P+P subsidies or travel reimbursements (excluding expenses for the chapter executive)?

P+P Subsidy Description *

Briefly describe your chapter's P+P subsidy and/or reimbursement program (i.e., who is eligible for the subsidy/reimbursement, amount of subsidy/reimbursement, etc.).

State Annual Meeting, Convention or Sales Congress

of State Convention Attendees *

How many members from your chapter are expected to attend the State Annual Meeting, Convention, Sales Congress or similar event? (If unknown or your state isn't planning such an event, enter "0.")

State Meeting Subsidy *

Yes No

Will your chapter reimburse or subsidize any members (including board members) attending the 2019 State Annual Meeting?

Chapter Meetings/Events

of Events Planned *

How many meetings or events (including social events) are you planning to host in 2019?

of Social/Networking Events *

How many of your events will only be social/networking events in 2019?

Joint Events

Describe any plans you have to co-host events with other industry organizations in 2019.

Calendar of Events

Please use the the [2019 Program Calendar Template](#) to report your calendar of events for 2019, including affiliate events.

Calendar of Events *

Choose File No file chosen

Excel Spreadsheet using Program Calendar Template REQUIRED.

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 4. Communications/Marketing

Social Media Channels*

- Facebook Page
- LinkedIn Page
- Twitter
- Instagram
- YouTube
- None

Select the social media channels your chapter uses.

Goal for Social Media Posting Frequency*

- Multiple times a day
- Daily
- At Least 3x per week
- At least 1x per week
- At least 3x per month
- At least 1x per month
- Less than 1x per month

Select the option that best describes how regularly your chapter plans to post (on average) to one or more of your social media channels. If your chapter posts on multiple channels, select the frequency for the channel your chapter posts to most often.

Social Media Followers

Please indicate how many followers your chapter has on each of its social media channels currently and how many followers you plan to have by the end of 2019 (goal).

Facebook Followers-Current*

Facebook Followers-Goal*

LinkedIn Followers-Current*

LinkedIn Followers-Goal*

Twitter Followers-Current*

Twitter Followers-Goal*

Instagram Followers-Current*

Instagram Followers-Goal*

YouTube Followers-Current*

YouTube Followers-Goal*

Online Community/Online Group*

- Yes No

Does your chapter have a Facebook, LinkedIn, Google Group or other online community for members or a subset of members (i.e., YATs)?

of Online Community Members*

How many members are part of your online community?

Online Community/Online Group Activity*

- Multiple times a day Daily At Least 3x per week At least 1x per week At least 3x per month
- At least 1x per month Less than 1x per month

Select the option that best describes how regularly members post (on average) to your chapter's online community/online group.

Member Publications/Communications*

	Not Planned	Weekly	Monthly	Bi-Monthly	Quarterly	Annually	As Needed
Newsletter Distributed Electronically	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Newsletter Distributed by Mail	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Membership Directory Distributed Online or Electronically	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Membership Directory Distributed by Mail	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
--	----------------------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

Indicate which types of communications from the list above you are planning to distribute in 2019 and at what frequency.

Other publications/communications (not listed above)

Press Releases *

Approximately how many press releases are you planning to issue this year? (If none, enter "0")

Types of Press Releases *

- Meeting/Event Announcements
- Board Elections
- Industry Awareness Campaigns (i.e., Life Insurance Awareness Month)
- Community Service Projects/Charitable Donations
- Members Attending State Day on the Hill
- Members Attending NAIFA Congressional Conference
- Members Attending Meetings with Legislators
- Member Recognition (awards, designations/certifications, etc.)
- Other:

Select the types of press releases you are planning to issue this year.

Community Service Activities *

We plan to...

Describe any community service activities planned by your chapter in 2019. (If none, enter "none".)

Program/Event Promotion *

	Not Applicable	Email	Chapter Website (banners, calendar, microsite)	Unpaid Social Media Posts	Paid Social Media Posts/Ads	Direct Mail (Postcard, Brochure, Flier)	Printed Material Distributed at Agencies	Printed Material Distributed at NAIFA Meetings	Telemarketing (either by staff, volunteers or third party)
Chapter Meetings/Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State Day on the Hill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State Annual Meeting/Convention/Sales Congress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other State-Planned Meetings/Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAIFA Congressional Conference	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAIFA Performance + Purpose Conference	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please select the ways your chapter is planning to promote various types of events listed above.

Marketing to Nonmembers *

We plan to...

Other than social media, describe how you market programs, meetings and events to nonmembers.

Nonmember Attendees *

What is your goal for the number of nonmember attendees at chapter meetings and events this year (including social events)? (If none, enter "0".)

Marketing Budget *

What percentage of your budget do you allocate to marketing?

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 5. Volunteers

As you think of volunteer roles in your chapter, don't focus only on formal committee roles. Remember to count members who speak without compensation, help out at meetings, serve as mentors, help with PAC fundraising, deliver PAC checks, etc.

Volunteer Recruitment *

We recruit volunteers by...

Describe how you identify and recruit members to serve in volunteer roles.

Volunteer Orientation *

We train volunteers by...

Describe your process for volunteer on-boarding, training or orientation. (If you don't have a formal process, enter "none.")

Volunteer Recognition *

We recognize volunteers by...

Describe your plans to recognize volunteers in 2019. (If you do not have a volunteer recognition plan, enter "none.")

Ad Hoc Volunteer Roles *

- Speaking/Moderating
- Writing/Editing Newsletter Articles or Blog Posts
- Mentoring
- Participating in Community Service Projects
- Onsite Support at Meetings (registration, greeters, speaker hosts, etc.)
- Welcoming New Members
- Following Up with Lapsed Members
- Distributing Promotional Materials to Agencies
- Representing the chapter at industry, company or legislative events
- Posting to chapter social media
- Other:

Select the roles you have identified for volunteers other than formally serving on a committee.

Volunteer Goal *

25

Including members serving on the chapter board and committees, how many volunteers are you hoping to engage in 2019?

Volunteer Role Descriptions

Choose File No file chosen

If you have written job descriptions or role descriptions for any of your volunteer positions, even if only a sentence or two, please share them with us.

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 6. Finance

Accounting Year Change *

Yes No

Is your chapter planning to change from a fiscal year ending 6/30 to a calendar year for accounting purposes?

Effective Date of New Accounting Year *

1/1/2019 1/1/2020 1/1/2021

Other:

Indicate when you are planning to make the switch to a calendar year.

Accounting Method *

Cash Basis

Accrual Basis

Budget *

Choose File No file chosen

Please provide either your fiscal year ending 6/30/2019 budget or your calendar year ending 12/31/2019 budget. (Excel Spreadsheet format preferred.)

Balance Sheet *

Choose File No file chosen

Please provide your balance sheet for the period ending 12/31/2018.

Income Statement *

Choose File No file chosen

Please provide your statement of revenues and expenditures (income statement) for the period ending 12/31/2018.

Foundation *

\$

If your chapter has a separate 501(c)(3) foundation, please provide the total account balance (checking, savings, investments) as of 12/31/2018. If you do not have a foundation, enter 0.

Audit/Review *

Yes No

Is your chapter planning to have a third party or volunteer audit committee conduct a review or audit of your financial statements in 2019?

[Save and Resume Later](#)

[Previous](#)

[Next](#)

Progress



Section 7. Governance

Officer/Board Terms *

Yes No

Is your chapter planning to change the terms of your officers/board to coincide with the calendar year?

Effective Date of New Officer/Board Terms *

1/1/2019 1/1/2020 1/1/2021

Other:

Indicate when you are planning to make the switch to a calendar year.

Bylaws *



Date your delegate council adopted or will adopt the new bylaws.

Proposed Bylaws *

[Choose File](#) **No file chosen**

Please submit a copy of your new bylaws for review prior to adoption to ensure compliance. If you have already adopted your new bylaws, please submit them for review.

[Save and Resume Later](#)

[Previous](#)

[Submit Form](#)

Progress