

Executive Committee

President

- Responsible for day-to-day activity of the chapter, including delegation of responsibilities and follow-up on tasks assigned to others.
- Establish meeting agendas and serve as moderator of chapter meetings.
- Represent the chapter at state, regional and national meetings.
- If serving as a president of a local chapter, will serve on the state board if required.
- Involved in raising funds for the chapter.

President-Elect

- In addition to assisting the president, the president-elect acts as the president in the event that the president is not present or no longer serving.
- Learns the responsibilities of the president and provides leadership in his or her absence.
- Is available to chair a major committee.

Secretary

- Records and distributes minutes of board meetings.
- Maintains a current copy of bylaws, and policies and procedures.
- Prepares an annual report as to the past year procedures of the chapter.
- Maintains board roster and attendance records to help determine a quorum.

Treasurer

- Receives and deposits all checks.
- Maintains financials for the chapter. Processes invoices, contributions and reimbursements.
- Balances checkbook and handles audits.
- Prepares the annual budget as well as the treasurer's report to be presented at board meetings.
- Files Form 990-Return of Organization Exempt from Income Tax (to be filed by the 15th of the 5th month after year end).

Past President

- Supports the president and president-elect.
- Is available to chair a major committee.

Committee Chairs

Membership/Retention Chair

- Promotes the value of membership to prospective and current members.
- Develops and delegates responsibilities for incentive programs to increase membership and retention. Promotes national and state membership drives.
- Keeps track of membership statistics (new members, renewals, changes/deletions, dues, etc.). Keeps a "guest" meeting list for solicitation purposes.
- Reviews membership information for the previous year and sets goals for the upcoming year.
- Maintains updated membership supplies (i.e. applications, affinity information) and is familiar with membership tools on NAHU website.
- Contacts carriers, general agents and large agencies for membership.

Legislative Chair

- Takes action on legislative and regulatory issues of interest to health insurance agents and brokers.
- Builds relationships with legislatures and like minded organizations.
- Encourages chapter-level political involvement and grassroots activity.
- Keeps chapter members informed about legislative and regulatory happenings in both Washington, DC, and the state capitol.

Education/Program Chair

- Sets program topics, locations and agenda.
- Contacts and makes arrangements for speakers.
- Develops questionnaire for program feedback.
- Files for CE credits.
- Organizes credentialing and designation workshops.

Media Relations Chair

- Compiles a list of local print and broadcast media contacts.
- Sends press releases and advisories to media contacts responding to targeted legislative issues as well as promoting the chapter.
- Forwards NAHU press releases on national issues to media contacts with a local spin.

Communications Chair

- Compiles and distributes newsletter.
- Notifies the membership of upcoming meetings and educational events.
- Keeps the membership informed on chapter events, changes and recognition.
- Maintains website accordingly.

Awards Chair

- Acts as a resource to the chapter on what documentation is needed for each NAHU award.
- Assembles documentation for awards applications and submits it to NAHU on a timely basis.



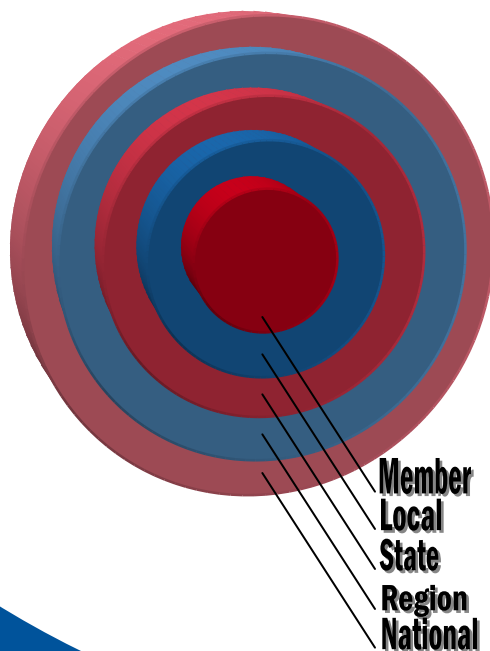
Guide to Leadership

As a member-centered organization the member is the center of all we do. As volunteer leaders we need to make sure we engage our members and get our message to them.

To be successful, we need to clearly define what our leadership roles are and understand how one role relates to another in order to effectively communicate down to our target audience—the members.

Creating an Effective Organization

This guide is designed to help us understand what our role as a volunteer leader is and how we should be communicating our message from NAHU all the way down to our members.



Chapter Relations Purpose Statement

The Chapter Relations Committee will collaborate with the RVPs, committees and staff to provide resources for state and local chapters to excel in leadership development, operations and chapter management.

NAHU Mission Statement

NAHU will improve its members' ability to meet the health, financial and retirement security needs of all Americans through education, advocacy and professional development.

NAHU Vision Statement

Every American will have access to private sector solutions for health, financial and retirement security and the services of insurance professionals.

National Association of Health Underwriters

1212 New York Ave, NW, Ste 1100
Washington, DC 20005
202-552-5060 • 202-747-6820 (fax)
bwillson@nahu.org • www.nahu.org



Your Leadership Guide

*Roles and Responsibilities
of NAHU Volunteer Leaders*