



## FROM THE OFFICE OF THE NAIFA PRESIDENT

Dear Colleagues:

Today, with this message, NAIFA Secretary Jill Judd notifies the secretaries of NAIFA state and local associations of the Board of Trustees' proposal to adopt a new set of national bylaws that incorporate recommendations from the NAIFA 20/20 Quality Member Experience (QME) [task force](#). As you know, the task force – appointed by the board last year to begin phase two implementation of the NAIFA 20/20 [strategic plan](#) – released its [report](#) in March. The bylaws proposal, which will be voted on at the 2017 NAIFA Performance + Purpose Conference, can be found on the [Resolutions and Amendments page](#).

The group's recommendations to improve the NAIFA business and financial models generated hundreds of comments during two separate review periods, the second of which closed June 16. Much of the [feedback](#) focused on the group's recommendation to restructure the federation as a professional association, with a national association, state chapters and local activities coordinated by the states. Comments primarily reflected concerns over the potential impact the absence of a formal local association could have on membership quality.

After extensive discussion and deliberation, the Board and task force revised the recommendation to include the establishment of **certain local chapters** in addition to state chapters. The board's proposal of a new set of NAIFA Bylaws reflects three main goals:

1. Create a NAIFA federation structure with chapter relationships between national, states, and strong locals, so we have fewer – but more successful – associations to pursue the NAIFA mission;
2. Establish standards for successful NAIFA associations that we're all accountable for at the national, state, and local level; and
3. Move to one consistent dues amount nationwide.

If adopted, the new NAIFA bylaws will be effective Jan. 1, 2019, and the federation will work together towards implementation between now and 2019.

During the comment period, members also requested additional information on how the current state and local associations would transition to and operate under the proposed structure, and what the standards for success would resemble. I'd like to thank the dozens of volunteer leaders and executives who participated in four separate working groups assigned to explore these matters and provide

recommendations to further inform the federation. Please visit the [QME pages](#) on NAIFA.org to access their reports, an [FAQ](#) and other materials related to the board's proposal.

NAIFA 20/20 offers your association its best opportunity to build on our legacy of accomplishment, achieve long-term success, and provide members the highest possible return on their dues investment. It has been my honor and pleasure to serve as NAIFA's president during the initial implementation of NAIFA 20/20, as we begin to reshape our association to thrive, now and into the future.

Of course, none of this would be possible without you – NAIFA leaders who go above and beyond and give your time, intelligence, and passion to ensuring NAIFA's success. I am continuously awed by the dedication you have for your clients and colleagues, our industry, and NAIFA. I am also confident that you will see the merits of the QME task force's recommendations, as I do, and vote in September to move NAIFA forward in the coming years.

Let's work together as one NAIFA to reach new heights and provide our colleagues with the best possible quality member experience so NAIFA may continue to serve as the pre-eminent and unified voice in the insurance and financial services industry.

Thank you,



**Paul R. Dougherty, LUTCF, FSS, HIA**  
**NAIFA President**

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