

#### 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.

### 2008—2009 Chapter Relations Committee

#### Carol Matznick, Chair

(336)605-9108

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#### Erica Grimm, Vice-Chair

(610)703-5786

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#### Ginger Ashton Vernon, Ad Hoc Member

(540)772-2841

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Brooke Wilson, NAHU Staff

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#### Regional Contacts:

Region 1 – Norman Michaels

Region 2 – Erica Grimm

Region 3 – Norman Springer

Region 4 – TBD

Region 5 – Vicky Major-Bell

Region 6 – Jacqueline St. Hilaire

Region 7 – John Rothstein

Region 8 – Rebecca Purdy

## 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

National Association of  
Health Underwriters

Your

Leadership Guide

At A Glance



America's Benefits Specialists

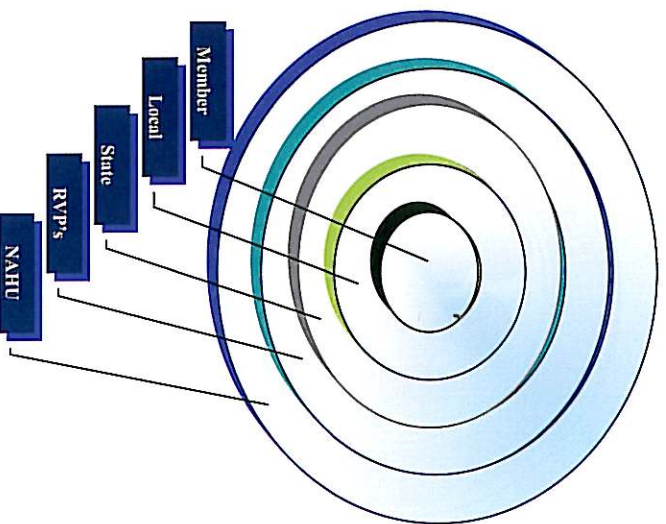
# Guide to Leadership

## Roles & Responsibilities of NAHU Volunteer Leaders

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 (1) clearly define what our Leadership roles are and (2) understand how one role relates to another in order to effectively communicate down to our target audience—the Members.



**Communication, authority and accountability are the key to creating an effective organization.**

This Guide to Leadership 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.

## Executive Committee:

### President:

- Responsible for day-to-day activity of the chapter, including delegation of responsibilities and follow-up on tasks assigned to others.

- Establishes the meeting agendas and serves as moderator of chapter meetings.

- Represents the chapter at state, regional and national meetings.

- Serves on the state board if required while serving as a President of a local chapter

- Helps in raising funds for the chapter.

### 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.

- Chairs major committees when needed.

### 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, GA's 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 legislators 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.