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**NATIONAL LEADERSHIP**  
Conference

October 14, 2025 | UVA Darden Sands Family Grounds Arlington, VA 22209

# Leading Advocacy: Roles, Responsibilities, & Expectations

Grassroots National Committee Chair: Michael Struebing

IFAPAC National Committee Chair: Richard Porter

Grassroots National Committee Vice Chair: Rebecca Brown Schulter

IFAPAC National Committee Member: Joey Ussery



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# Session Goals

NAIFA's successful advocacy is built on the three-legged stool of professional lobbying, grassroots and political action committees

- Become a successful chapter chair
- Lead the charge and put it into action
- Keep fun in fundraising without going to jail



# Welcome to NAIFA Advocacy



# Committee Leaders



**IFAPAC Chair**  
Richard Porter



**Grassroots Chair**  
Michael Struebing



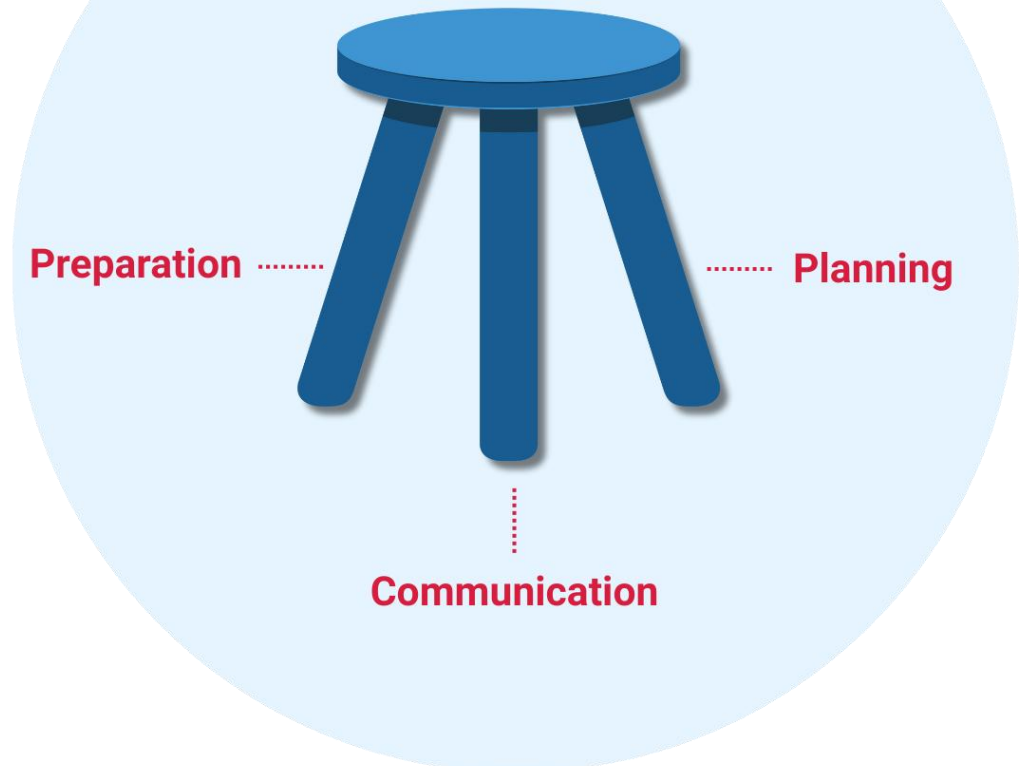
**PAC Member**  
Joey Ussery



**Grassroots Vice Chair**  
Rebecca Brown  
Schuler

# Q1

As a NAIFA Advocacy Leader, how do communication, preparation, and succession planning each play a role in ensuring your effectiveness and in building sustainable advocacy for the future?





## Q2

What strategies can Advocacy Leaders use to achieve the most important goals—State Legislative Days, PAC Madness, NAIFA in the Districts meetings, and Elections—and how can they best position their chapter for long-term success?



## Q3

Why is maintaining clean and accurate data for PAC and grassroots efforts in the Advocacy Action Center so critical, and how can this information be leveraged to strengthen and empower relationships with lawmakers?





## Q4 – Candidate Selection Group

As Advocacy Leaders most of you serve on the CSG for our federal PAC, NAIFAPAC, and have served on your chapter's CSG, too. As you know, healthy PACs raise money to help elect friendly candidates. What do you see as the best operating procedure for chapter-level CSGs – who should be involved, how often do they meet, and how are you picking candidates to support?



## Q5 – Part One

Why is it ideal for Advocacy Leaders to serve a two-year term aligned with the congressional calendar, and how does this alignment benefit our advocacy efforts?



## Q5 – Part Two

When your term ends, what are the best practices for training, mentoring, and transitioning new leaders to ensure continuity and long-term success?



## Q5 – Part Three

Some of our advocacy leaders have served in their roles for a few terms. What are the benefits, as well as potential drawbacks of not passing the baton onto the next round of NAIFA leaders?



## Q6

Understanding that each state faces their own obstacles when it comes to engaging with lawmakers and PAC involvement, what is the best way for states to navigate their landscape and build strong advocacy programs?



## Q7

These are volunteer roles: What are traits that you look for in chapter advocacy leaders as well as qualities look for when “promoting” leaders to national committees?



# Some quick takeaways...

## For Grassroots, what is a successful year?

- Host a FSAA Live
- Host a State Legislative Day
- Get 2 members per congressional district to Congressional Conference
- Host NAIFA in the District meetings with lawmakers
- 100% reporting of relationships with lawmakers (No gaps)

## For PAC, what is a successful year?

- Grow contributors
- Grow contributions
- Participate in PAC madness
- Proper filing with state commissions
- Attend in-state fundraisers







TM



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Learn More at [www.naifa.org/ifapac](http://www.naifa.org/ifapac)





# Report a Relationship

## Do you know any lawmakers?



# For more information...

Grassroots: Andrew Holt [Aholt@naifa.org](mailto:Aholt@naifa.org)

PAC: Cody Schoonover [cschoonover@naifa.org](mailto:cschoonover@naifa.org)

Policy Creation: Roger Moore [rmoore@naifa.org](mailto:rmoore@naifa.org)

Policy Implementation: Bianca Alonso Weiss [bweiss@naifa.org](mailto:bweiss@naifa.org)

Political Programs: Stephanie Sheridan [ssheridan@naifa.org](mailto:ssheridan@naifa.org)







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# Membership is Everyone's Job! Using Your Role to Grow NAIFA.

By Adam Sachs, Roger Sims, & Corey Mathews

Government Relations Track



# What do we mean by "Membership is Everyone's Job?"



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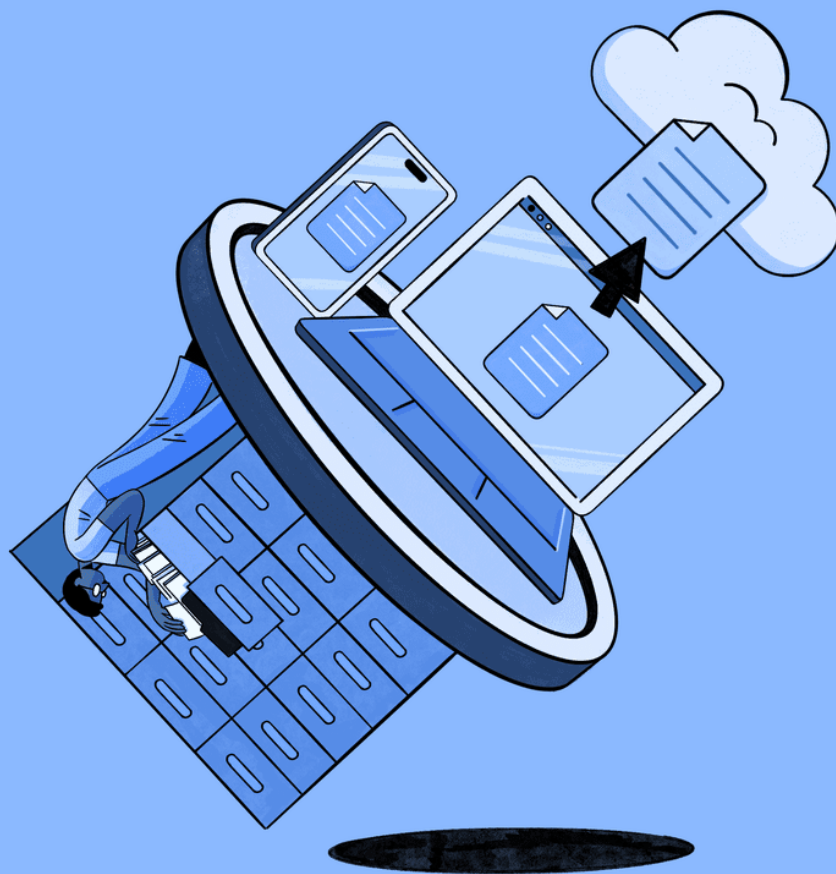


# What happens when membership declines?

- Associations must make painful budget cuts that negatively impact our ability to serve our members by...
  - Downsizing staff;
  - Reducing or eliminating consulting contracts;
  - Cutting key programming;
  - Lost sponsorships due to declining membership;
  - Eliminating or extending the timeline for initiatives;
  - Less personal touch; and/or
  - Limited effectiveness.

# Painful Truths...

- Members don't join an association to recruit members.
- Younger generations don't feel a responsibility to join associations, they seek value/return on investment.
- Getting someone to join is just the first step...you must get them engaged so that they realize the value of the membership.
- Members are busier than ever and are more protective of their time than ever before, making it more challenging to find volunteers to help carry the water.



# Paradigm Shift

*['per-ə-,dīm 'shift]*

A major change in the worldview, concepts, and practices of how something works or is accomplished.



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# OPERATION MEMBERSHIP





# NAIFA's Membership Paradigm Shift

- Inbound vs. Outbound Marketing
- Prospecting/Lead Generation for Individuals & Group Sales
- Referral & Testimonial Development from Members/Chapters
- Organized & Focused Membership Campaigns
- Clearly Stated/Demonstrated ROI...with NUMBERS
- Development of Member Personas and Messaging
- Comprehensive Chapter Engagement Focus

# What We Need From You!

- To make membership growth your Chapter's #1 priority this coming year!
- To read, understand, and ask questions, if needed, about the NAIFA Membership Action Plan.
- To set your Chapter Goals for membership consistent with those in the plan and hold us all accountable to meeting them.
- To come to each of your Board meetings prepared to talk about membership and how the GR program can support membership growth for your Chapter.



# Best Practice – New Tax Law Webinar

- National GR Team held an informational webinar on the 2025 New Tax Law and how to hold client conversations.
- We opened the presentation to non-members to create an opportunity to engage them, demonstrate the value of membership, and open communications with them as prospective members.
- There were 1,287 registrants, 22% of which were prospective members, generating 286 new prospects that we are marketing to.



# Best Practice – In-District Meetings

- NAIFA takes advantage of the summer recess from Congress each year to meet with our lawmakers while they are home and “in the district.”
- This is a great opportunity to bring new and prospective members to see advocacy in action and help them to understand the value and importance of NAIFA membership for their career.
- Many who have experienced this assert they knew afterwards that they had to be members for life!





**What ideas can you share on how GR leaders can assist in growing NAIFA's membership?**

# Questions/Comments?



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# Advocacy in Action: Tools, Tips & Tricks

By NAIFA Trustees John Wheeler, John D. Richardson & Dennis Cuccinelli



# Session Goals & Slido

This session is a collaborative approach where individuals share knowledge, skills, and experiences to enhance understanding and advocacy success through interaction and dialogue. You'll learn:

- What worked for others.
- Best practices for successful chapter advocacy efforts
- How to access resources.



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# Advocacy Q & A Part 1

By John Wheeler



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# Advocacy Tips & Tricks Questions Part1

① The Slido app must be installed on every computer you're presenting from

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# How To Become More Important to Lawmakers



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# Advocacy Resources

By John D. Richardson



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# Advocacy Q & A Part 2

By Dennis Cuccinelli



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## Part 2: Advocacy Tips & Tricks

① The Slido app must be installed on every computer you're presenting from

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# Questions

Political Programs – Stephanie Sheridan

PACs – Cody Schoonover & Shanika Thomas

Grassroots – Andrew Holt

Policy Creation – Roger Moore

Policy Implementation – Bianca Wiess