

Secretaries-HR Section Mid-Year Meeting
Hollywood Beach Marriott – Hollywood, FL – April 10-12, 2010
Schedule of Events
(Schedule as of 2/8/10 – subject to change.)

Saturday, April 10

Arrivals and Hotel Check-In

5:30 – 6:30 pm

Registration

6:00 – 7:00 pm

Reception (cash bar)

7:00 - 9:00 pm

Dinner on own

Sunday, April 11

7:30 - 8:45 am

Breakfast

Welcome & Opening Remarks

- *Linda Strom, President, Secretaries Section*
- *Janet Goulart, President, Human Resources Section*
- *Teresa Rasmussen, NFCA Chair of the Board*
- *Joseph J. Annotti, President & CEO, NFCA*

8:45 - 9:45 am

Actuarial for Dummies

- *Chuck Ritzke, Problem Solving Enterprises*
- With special session on **Principals Based Reserving**, including John Miller, Miller & Newberg

9:45 - 10:45 am

Giving and Getting Good Employee Reviews; Employment Law Update

10:45 - 11:45 am

Governance Nightmares of 2009

- *Todd Martin, NFCA Legal Counsel, Reinhart Boerner Van Deuren s.c.*

Noon - 1:00 pm

Working Lunch

Annual Roundtable Discussions

- *Led by Al Lorge, Sr. VP, Secretary/Treasurer, & CFO, Catholic Knights*

1:00 - 2:00 pm

Annual Roundtable Discussions, Continued

2:15 - 3:00 pm

Fraternal Benefit System Solvency Update

- *Mike Wade, Wexford Partners*

3:00 – 3:15 pm

Break

3:15 – 4:15 pm

Membership Data – Maximizing Its Marketing Power

- *Mark Poole, Marsh Global Consumer, and*
- *Chuck Ritzke, Problem Solving Enterprises*

4:15 – 5:00 pm

Local Lodge Reporting & Rewarding

- *Strategies to get lodges to do what is required*
- *How your society can and should use your reporting statistics; how the NFCA's new system can help you and how it helps them preserve the fraternal tax exemption.*
- *Bring your samples of successful strategies/collection forms/methods to share with the group!*

Joint Reception and Dinner with Presidents Section

Monday, April 12

7:30 - 8:45 am

Joint Breakfast with Presidents Section

8:45 am - 12:15 pm

Joint Session with Presidents Section

“Going on the Offensive: Selling Our Story Before a Threat to Our Tax Exemption Appears on the Legislative Menu”

An intense half-day program devoted to our most important public policy issue: preserving, protecting, and enhancing fraternal's tax-exempt status. You'll walk away with a fuller understanding of the exemption's history, the requirements each society must meet to maintain it, the potential threats posed by state legislatures and a Congress desperate for revenue, and effective ways to marshal the potential of your society's grassroots strength. Better yet, you'll help create the messages that we can all use when speaking with public policymakers and get a chance to sharpen your ability to communicate those messages in a series of mock interviews.

8:30 am

Why the Exemption Exists and What Every Society Must Do to Meet IRS Compliance Standards

- *Paul Johnston, Thrivent Financial for Lutherans*

9:15 am

Assessing the Political Landscape: Where Are the Threats, How Can We Overcome Them, What is the CEO's Role?

- *Jenn Fogel-Bublick and Jeff Markey, McBee Strategic Consultants, and*
- *Melissa Bonicelli, Venn Strategies*

10:00 am

Creating Messages that Work: Knowing What We Want to Say and Addressing What Others May Be Saying About Us

- *Maureen Wall Bentley, Aartrijk*

10:45 am

Building Your Communications Skills – Breakout Sessions with Mock Interviews

Breakouts conducted by representatives of McBee Strategic Consultants, Aartrijk, and Venn Strategies

12:15 pm

Luncheon Address – Rebranding Your Trade Association

- *Maureen Wall Bentley, Aartrijk*
- (Joint Lunch with Presidents Section)

Secretaries/HR Mid-Year Meeting Adjourns

Afternoon starts Presidents Section; Secretaries may attend the first afternoon session, if desired, without incurring any additional fees.

Tuesday, April 13

8:30 am - Noon

Presidents Section continues

Noon

Presidents Section Mid-Year Meeting adjourns

Golf Tournament in afternoon; Secretaries may register for tournament.

Informal dinner for stragglers from both meetings.