NAIFA | Leaders

Chapter Annual Report: From Reporting to Results

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Chapter Annual Report

A practical leadership tool for Chapter Executive Directors, Presidents and Presidents-Elects.

Report. Reflect. Plan for Success. Connect Chapter Annual Reporting directly to Chapter health and forward momentum.



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PURPOSE & SCOPE

Why the Report Exists

The Chapter Annual Report was implemented in 2021 to give a shared, objective snapshot of Chapter performance, governance health and member value across the country.

Understand Chapter health: Evaluate board governance, membership retention, advocacy engagement and financial discipline.

Track year-over-year progress: Measure growth against previous cycles, sustain winning programs and address emerging risks early.

Identify improvement opportunities: Target NAIFA resources, peer mentoring and operational toolkits for impact.

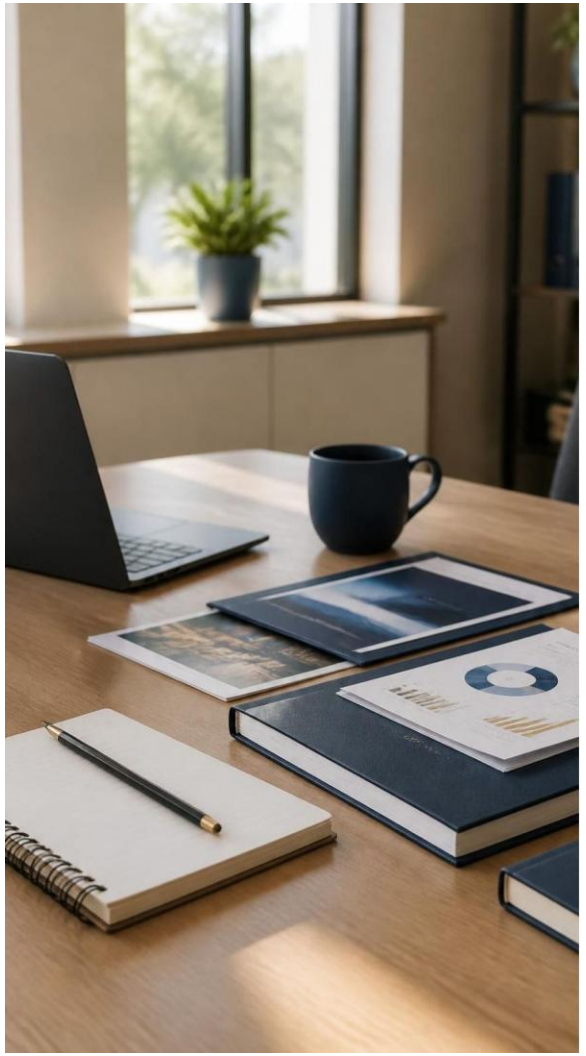
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READINESS CHECKLIST

What to Prepare Before You Begin

Assembling records before opening the form cuts reporting time in half and guarantees consistent answers.

1. **Designate an owner and confirm access.** Appoint the Chapter Executive Director to manage your Chapter's submission, confirm sign-in details and the deadline with NAIFA.
2. **Gather operational and financial records.** Pull corporate filing status documents, year-end financial statements, approved budgets, insurance polices, event rosters, etc.
3. **Coordinate across Chapter leaders.** If necessary, assign specialized reporting sections early to committee chairs for Membership, Advocacy and Professional Development.
4. **Schedule a joint review meeting.** Block a dedicated working session with the President and President-Elect to validate responses before submitting.



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SYSTEM ACCESS

Access and Sign In

Ensure authorized staff and leaders have active credentials before the reporting deadline to avoid lockouts.



Portal Location

Access the designated annual reporting platform.

Verified Portal URL:
https://naifa.rizepoint.com/coreFC/



Login Credentials

Log in with verified credentials.

Account Format: Username (Email Address) & Password



Technical Support

Direct support for password resets and permission errors.

Support Contact:
Kaila Wilson at kwilson@naifa.org

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WORKFLOW GUIDANCE

Move Through the Report Efficiently

Use this structured approach to avoid submission delays and rework.

1

Preview all questions.

Review the complete questionnaire first to identify every data point before entering live values.

2

Delegate question sets to topic leads.

Share exact questions with committee chairs; each section is completed by the officer closest to the work.

3

Maintain an offline working document.

Collate responses and attachments in a shared Chapter folder so no inputs are lost during drafts.

4

Conduct a final pre-submission audit.

Verify finance and membership figures with your President before submitting.

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WORKFLOW GUIDANCE

Upload Documents During Reporting

Several core compliance and recognition items require document uploads during submission.

Eligible File Types

Prepare approved documentation formats: Corporate Filing Status, Financial Statements, Insurance Policies, Event Calendars, etc.

Upload Specifications

Supported formats (PDF preferred, but Word and Excel are also acceptable) and max size per document (10 MB).

Receipt Confirmation

Check for timestamped portal confirmation receipt and email.

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REPORTING CYCLE UPDATES

What’s New This Year

Review verified updates for the current cycle. Confirm organization-specific deadlines and newly added criteria with NAIFA before submission.

Reporting Cycle & Deadlines

Reporting Year: 2027

Submission Window Opens: Monday, January 4, 2027

Final Deadline: Sunday, February 28, 2027

Health Score Release: Monday, March 1, 2027

Confirmed Additions & Requirement Changes

With the exception of date changes (2026 to 2027) and wording to clarify responses, nothing has been added or changed!

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PERFORMANCE EVALUATION

Understanding the Chapter Health Rating

Annual Report information directly populates your official Chapter Health Rating and gives an objective benchmark for coaching.



Health Rating Scale

Calculated index of operational excellence.

Key Pillars Impacting Your Score

- **Advocacy Engagement:** Grassroots responsiveness and PAC participation.
- **Membership Stability:** New recruitment rates and active member retention.
- **Programs & Events:** Quality professional development sessions delivered.
- **Financial Governance:** Balanced operations, reserves and clean recordkeeping.

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STRATEGIC EXECUTION

Turn Health Results into Action

A rating is only as valuable as the leadership response it triggers.

1. **Review Results Together.** Convene the full Executive Committee to review the health rating summary report.
2. **Isolate Strengths & Gaps.** Highlight excellence and isolate operations below NAIFA benchmarks.
3. **Select 2-3 Annual Priorities.** Focus board capacity on achievable targets rather than too many fronts.
4. **Assign Chapter Action Plan.** Create an official plan with named leadership owners and 90-day check-ins.

Connect the Action Plan to monthly board agendas for sustained accountability.

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CHAPTER PERFORMANCE

Turn Health Results into Excellence









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THE BIGGER PICTURE

Why NAIFA Collects the Information

The annual reporting dataset strengthens individual Chapter leadership and reinforces the entire NAIFA federation.

Strengthen Chapter Operations: Standardized operational metrics give Chapter boards reliable insights to refine governance and budgeting.

Elevate the Member Experience: Highlights high-impact educational programming and networking events that drive member value and community retention.

Amplify National Advocacy & Scale: Aggregated Chapter metrics provide irrefutable data empowering NAIFA's federal and state legislative advocacy teams.

How the information is used: The report links reporting, your Chapter Health Rating, and your Chapter Action Plan.



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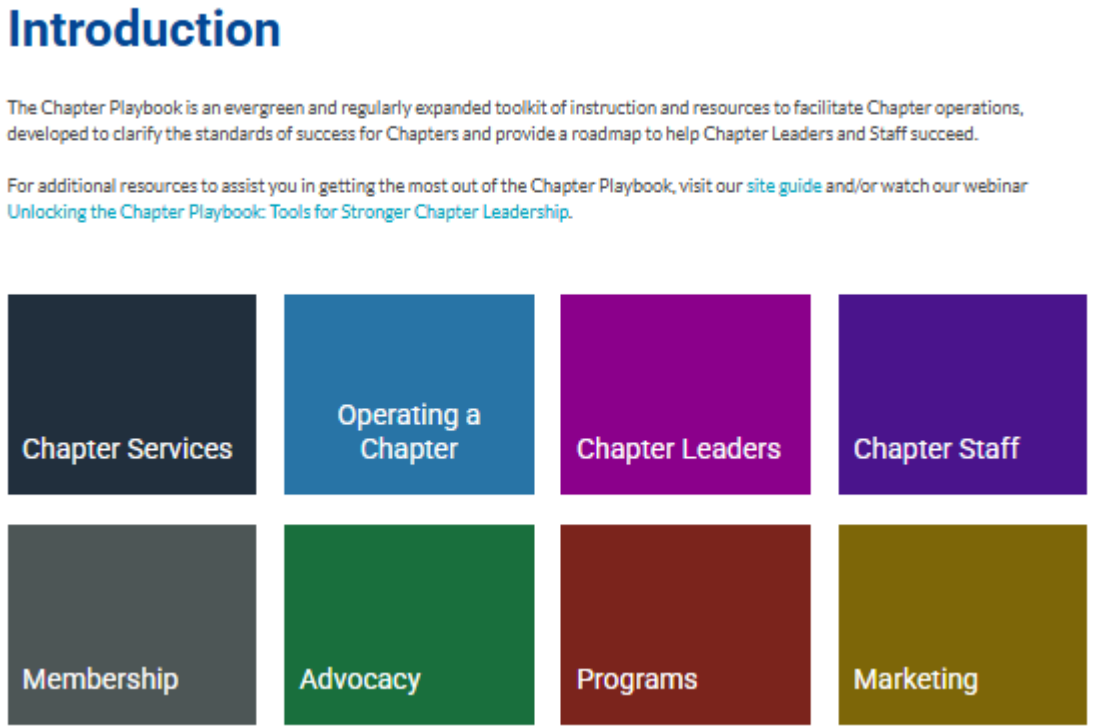
THE BIGGER PICTURE – Implementation

Why NAIFA Collects the Information

The annual reporting dataset provides valuable information to the Chapter Services Team on what resources to add to the Chapter Playbook each year. Examples include:

Templates: Model Board Agenda, Model Board Minutes, Model Executive Director Report and Model Committee Report.

Policies: Social Media Conduct by NAIFA Board Members, Policy on Chapter Use of NAIFA Member Lists, Antitrust Guidelines, Board Conflict of Interest Policy, Board Duties Memo, Code of Conduct for Virtual Programs, Document Retention, Industry Meetings Statement of Compliance, Policy on Recruiting, Program Disclaimer & Compliance Alert



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Questions

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