





From: [Kay Nevada](#) on behalf of [Nickelle Leist](#)
To: [Kay Nevada](#)
Subject: Summary of October CALIFORNIA YAT CHAT
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Importance: High

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CALIFORNIA YAT CHAT – Summary of October 5th Call

Thank you to everyone who participated in our first Monthly YAT Chat conference call. The California YAT Committee appreciates those who shared your input, experience, and best practices.

Here is compellation of all that was discussed – If I missed something, please let me know.

- 1. California YAT Chair Buddies were announced:** This is a new initiative headed by Committee Chair Steven M. Stratton, to help promote idea sharing, and provide additional support to growing locals. Throughout October, the California YAT Committee (Nickelle Leist, Denise Boyce, and Peter Buechler) will begin setting up quick 15 minute conference calls with each Buddy group and Steven Stratton.

Brian Ness – San Fernando Valley	&	Nancy Ramos – Los Angeles
Irma Romero – Mt. Diablo	&	Tynecia Martin – Long Beach
Todd M. Allen – San Diego	&	Shawn Minton – Central Coast
Jesse Parenti – San Francisco Peninsula	&	Sunny S. Wang – Silicon Valley
David Gingerich – Central Valley	&	John Nilmeier – Fresno

- 2. Key Resources:**

Go to the YAT Website: www.naifa.org/yat

- [Chair Responsibilities](#)
- [YAT Resource Guide](#)
- [YAT Playbook](#) - is your how-to guide on how to run your YAT group in your association
- [Association Achievement Award](#): Association Achievement Award recognizes excellence in performance by local associations on all levels of achievement
- [Example of Event Flyers used by other locals](#)
- [Example of YAT General Meeting flyer](#) – distribute at general meetings and every YAT meeting
- [Professional Development](#) – Training, Tools and Resources
- [Best Practice Guide](#)
- [YAT Flyer](#) - What does YAT mean to you

Who to contact:

- Does your YAT group have a success story you'd like to share? Please e-mail your narrative to yat@naifa.org
- Do you need a YAT logo for Marketing Materials? Contact yat@naifa.org
- Need a list of your local Members under 40 for 2010? Contact nickelle@provada.com
- Need to speak with your national YAT Committee Person? Contact Aprilyn Geissler: achavez1@farmersagent.com

- 3. How to get your local NAIFA board/local to be actively involved, and support your YAT program.**

- **Invite the entire NAIFA chapter to YAT events:** Many locals are now inviting all members to YAT Lunch & Learns, Mixers, and other social networking activities. The benefits are twofold: 1) Older members have the chance to create natural mentoring like connections with younger agents; simultaneously, YAT is gaining credibility within the local, and more support as a result.
- **Create a yearlong event handout** (see example of YAT meeting flyer above): Provide handouts to all members at the general meeting regarding upcoming events and mixers.
- **Dedicate two minutes of every general meeting to YAT.** Ask the local to set aside two minutes at the general meeting to inform members about what has been happening within the YAT program, events, successes, and future activities.
- **Get experienced members to sign up as YAT speakers:** Provide a sign up sheet at the general meeting for members to sign up as possible YAT event speakers. You can have them sign up with a topic, or under a specific topic chosen by YAT - Announce the sign up sheet during the two minutes dedicated to YAT.
- **Provide Board with 40 and under member roster:** Provide your Board with a percentage of all members under 40 (you can get this list by asking your current California YAT Chair). If the percentage is high, the Board should take an active role in helping YAT retain membership. If the percentage is low, the Board should work on increasing young members within the local, which will affect overall membership.
- **Attract agencies to boost YAT attendance:** Agencies are a great way to boost membership and attendance in a hurry. 1) Look at your membership roster for current members with an agency connection. Work with them on how to get more members of that agency involved, ask for a contact within the agency to call. 2) Look to your local Board members for information/relationship to an agency in your area.
- **Getting YAT involved on the Local Board:** What better way to gain Board support than to put the YAT on the Board. Most locals would agree that they need younger blood on the local Board - why not propose the outgoing local YAT Chair has a position on the Board.

- 4. Why it is important to have committee members along with a YAT Chair**

- **Plan for the future:** All too often, YAT programs fall apart because there is not a successful local YAT Chair succession plan in place. Choose 2 – 3, even 4 people to act as the local YAT Committee. The committee will provide a way for the local YAT program to carry on the traditions, events, and growth of the YAT program successes into the future.
- **Setting up your committee:** Some locals have structured their YAT



NOVEMBER CALL DETAILS:

Date: Tuesday,
November 2, 2010
Time: 10:00 AM
Dial: 1-888-387-
8686

Then Dial:
4432788#

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California Co-
Chairs
[Peter Buechler](#)
[Denise Boyce](#)

Committee to mirror the local Board. They have a President (the local Chair), Vice President, Secretary, Treasurer, etc. This structure not only provides a very specific succession to the YAT Chair position, but also an effective way to train YATs for a position on their local Board.

- **Be strategic about your committee members:** Large agencies can bring in many new members to both YAT and the local. Look for a YAT who is connected to a large agency to become involved on the YAT Committee.
- **Create YAT ambassadors:** Look to YAT and Non-YAT members to act as ambassadors to specific social spheres, as a quick and efficient way of informing groups of upcoming events. For example, pick one Mass Mutual agent to inform all Mass Mutual members of upcoming events, mixers, and networking events.

P.S. Want to get the best possible underwriting ratings for your clients? Of course you do. So how about joining our **webinar on October 12, 2010 at 10:30 AM PT**. You can register by going to <https://provada.illinc.com/register/brjphrx>. We'll be discussing the most important questions you need to ask EVERY client before submitting an application and what tools are available through Provada to underwrite your more challenging cases.