



## Open Call for Presentations 2012 Educational Programming

The American Fraternal Alliance represents 72 fraternal benefit societies across the U.S. The association provides educational and advocacy opportunities for members throughout the year including webinars, teleconferences, and high impact, hands-on educational and networking events.

The Fraternal Alliance hosts six educational/networking meetings throughout the year which are listed in this call for presentations. Please indicate later on the form all audiences to whom your topic is targeted. The leadership of each Section and their staff liaisons will review these during the planning process. (These topics may also be considered when Fraternal Alliance staff plans its semi-monthly webinars.)

A favorite feature of all Section meetings is the ability for fraternal professionals – from large and small societies – to share their knowledge and expertise on what works and what doesn't when tackling a common problem.

Fraternal leaders are encouraged to create workshops that highlight their own compelling success stories. Associate Members should consider how their expertise, product or service can assist (or did assist in the recent past) a society's ability to increase solvency, compliance, membership, sales, volunteerism or knowledge in vital areas of operations.

**The Secretaries Section**, combined with the Human Resources Section, tackle common issues that face executives who are responsible for the daily operations of member societies.  
Audience: Chief operating officers, society treasurers, human resources professionals, office managers  
Meeting Information:  
**April 14-16, 2012**  
Charleston Marriott  
Charleston, South Carolina

**The Presidents Section** examines high-level issues affecting the fraternal benefit system including those pertaining to regulation, legislation, operations, investments, sales, and advocacy, among many others.  
Audience: C-suite executives, senior staff  
Meeting Information:  
**April 15-17, 2012**  
Charleston Marriott  
Charleston, South Carolina

**The Investment Section** examines issues affecting the financial strength and solvency of fraternal.  
Audience: Presidents, CFOs, internal portfolio and investment managers and external strategists and advisors  
Meeting Information:  
**April 18, 2012**  
Charleston Marriott  
Charleston, South Carolina

**The Fraternal and Communications Sections** discuss marketing ideas, share fraternal success stories, and explore strategic solutions to challenges facing fraternal benefit societies.  
Audience: Community outreach professionals, volunteer managers, communications directors, marketing professionals, brand managers  
Meeting Information:  
**April 25-27, 2012**  
Hilton Garden Austin Downtown  
Austin, Texas

(continued)

**The Actuaries Section** promotes the knowledge of actuarial and related subjects pertaining to fraternal benefit societies.

Audience: Actuarial professionals

Meeting Information:

**Date and location TBD**

The **American Fraternal Alliance Annual Meeting** is the premiere event for fraternal professionals across North America. Once a year, high-level executives and fraternal leaders gather for three days of intense educational, networking, and strategy sessions designed to enlighten and empower the fraternal industry.

Audience: C-suite executives, community outreach and volunteer management professionals, communications managers, marketing and sales staff, Fraternal Insurance Counselors, agency managers, actuaries, investment professionals, HR and operations managers.

Meeting Information:

**Sept. 6-8, 2012**

Ritz-Carlton New Orleans

New Orleans, Louisiana

### **American Fraternal Alliance Presenter Guidelines**

- Presenters are responsible for all expenses associated with travel, lodging, and event registration.
- Presenters may submit multiple proposals for multiple audiences.
- Associate members may submit calls for presentations; however, sales pitches are prohibited. Associate members and fraternal professionals are welcome to submit case studies and examples of successful collaboration.
- Presenters are encouraged to provide handouts to workshop attendees.
- Powerpoint presentations, videos, and handouts may be made available to all Fraternal Alliance members via the Fraternal Alliance website. *All web material must be approved in advance by the Fraternal Alliance.*
- **Incomplete applications will not be accepted.**

### **1. Personal Information**

Name \_\_\_\_\_

Organization \_\_\_\_\_

Job Title \_\_\_\_\_

Phone \_\_\_\_\_

Are you a Fraternal Alliance society member or Associate member?

- Yes  
 No, please contact me.

What is your primary area of expertise?

\_\_\_\_\_

### **2. Topic (select no more than two per topic):**

- |   |  |
|---|--|
| <input type="checkbox"/> Leadership               | <input type="checkbox"/> Communications        |
| <input type="checkbox"/> Finance/ Economic issues | <input type="checkbox"/> Fraternal programming |
| <input type="checkbox"/> Governance               | <input type="checkbox"/> Volunteer management  |
| <input type="checkbox"/> Sales                    | <input type="checkbox"/> Human resources       |
| <input type="checkbox"/> Marketing                | <input type="checkbox"/> Other: _____          |
| <input type="checkbox"/> Insurance                | _____  |
| <input type="checkbox"/> Regulatory issues        |  |
| <input type="checkbox"/> Legislative issues       |  |
| <input type="checkbox"/> Advocacy                 |  |

**3. Target audience (select no more than two):**

- |   |   |
|---|---|
| <input type="checkbox"/> CEO                              | <input type="checkbox"/> Actuarial professionals                  |
| <input type="checkbox"/> COO/society secretary            | <input type="checkbox"/> Human resources/professional development |
| <input type="checkbox"/> Finance/investment professionals | <input type="checkbox"/> Sales managers                           |
| <input type="checkbox"/> Fraternal Insurance Counselors   |   |
| <input type="checkbox"/> Fraternal professionals          |   |
| <input type="checkbox"/> Communications professionals     |   |

**4. Session Title:** \_\_\_\_\_

**5. Keywords that describe the session:** \_\_\_\_\_

**6. Level of technical knowledge required by audience:**

- Novice
- Intermediate
- Expert

**7. Please attach a one-page session outline detailing how you would conduct a 75-minute workshop. Describe the structure of your presentation, roundtable discussion topics, and any interactive or hands-on features to engage attendees.**

**8. Session description for use in American Fraternal Alliance marketing/promotional materials (not to exceed 150 words):**

(Please attach separately.)

**9. Speaker biography suitable for marketing and promotional purposes:**

(100 words or less in text. No bullet points, please.)

**10. A/V Requirements:**

---

---

Please return this completed form, with the one-page outline referenced in point #7 and the session description referenced in #8 above, at your earliest convenience to the address below. Sections are considering workshop and session topics now, and the Annual Meeting will finalize its program by March 2012.

Thank you for your interest in providing relevant and valuable information to our members.



**AMERICAN  
FRATERNAL  
ALLIANCE**

**Allison Koppel**

Executive Vice President  
American Fraternal Alliance  
1301 W. 22nd Street, Suite 700  
Oak Brook, IL 60523  
P: 630.522.6322, x121  
F: 630.522.6326  
[akoppel@FraternalAlliance.org](mailto:akoppel@FraternalAlliance.org)  
[www.FraternalAlliance.org](http://www.FraternalAlliance.org)

*United in service and financial security*