

LILI Policy

LILI Moderator Policies

1. Moderator nominee must be a LILI graduate and an Active* NAIFA member in good standing for at least two years .
2. Moderators are volunteers. No moderator may receive remuneration from any source for their activities in connection with the LILI program.
3. Moderator agrees to comply with all rules and procedures adopted by NAIFA regarding the LILI curriculum and the use of any LILI materials.
4. Moderator recognizes that the name “Leadership in Life Institute,” the acronyms “LILI” and “lili” and the LILI logo are service marks owned by NAIFA. He/she agrees to use these marks only in connection with the NAIFA LILI program. He/she further agrees not to use these marks for any purpose other than in his/her capacity as LILI moderator without first obtaining the prior written consent of NAIFA or of the LILI subcommittee.
5. For the duration of the LILI course, and for 12 months thereafter, the moderator will not, in connection with his/her role as LILI moderator, enter into any agreement or engage in any discussions or negotiations regarding employment, or the provision of any materials or services with any LILI student. Moderator will not discuss the company connection or affiliation of any student. Moderator will ensure his/her company associates and colleagues also comply with these limitations.
6. Sole activity during LILI sessions will be to moderate pursuant to and in accordance with the materials contained in the *LILI Moderator’s Guide*. Moderator will not promote or solicit student involvement in any other activities, services or programs [other than NAIFA-related activities, services or programs].
7. Moderator agrees never to copy, sell, distribute or otherwise provide to any third-party the names, addresses, phone or fax numbers, or e-mail addresses of any LILI students and will not use such information except in connection with the role as LILI moderator.
8. Moderator agrees never to copy, sell, distribute or otherwise provide to any third party, or to use any materials from the LILI program (including materials from the LILI moderator training), except in connection with the role as a LILI moderator.
9. Moderator must get permission from the copyright holder before disseminating a copyrighted article to students.
10. **Institute class material changes each October.** Only the most current approved material may be used for LILI classes.
11. LILI courses may not start during the months of July through November.

*Consistent with NAIFA definition of Active member.

LILI Moderator Training Policy

12. Moderator must be endorsed annually by the sponsoring state, or region, as evidenced by the completed and signed moderator application.
13. Moderator must be approved annually by the NAIFA-LILI subcommittee.
14. Moderator, in order to moderate a LILI Institute, must have attended the complete LILI Moderator Training Conference each year before beginning their LILI institute.
15. Each institute must be pre-approved through the NAIFA-LILI subcommittee prior to the acceptance of any candidate applications.
16. **Reminder:** policy limits each local to no more than two participants per institute unless an exception is granted by the LILI subcommittee. A minimum of seven participants is required to begin an institute.
17. Lead moderator should bring copies of candidate applications and a class roster to the Moderator Training Conference.

Moderator Training Expenses

18. The lead moderator's travel and conference costs are paid by NAIFA, subject to the current NAIFA travel policy. Travel arrangements for the lead moderator must be made through the NAIFA Travel Center.
19. If a lead moderator attends the 2008 Moderator Training Conference and subsequently does not moderate, i.e., start an institute by June 30, 2009, the sponsor state will be billed the cost of all expenses related to that moderator's attendance at the conference.
20. Sponsor state will be billed a fee for co-moderators (moderators other than the lead moderator) for the cost of lodging, meals and materials related to attendance at the 2008 Training Conference.
21. Co-moderators (moderators other than the lead moderator) must arrange their own transportation and costs are paid by sponsor state. If sponsor state plans to use a co-moderator, he/she must attend the Moderator Training Conference that precedes the institute start date.
22. If the sponsor state is able to start a second institute by June 30, 2009, NAIFA will reimburse the state for training conference fee and all travel costs paid by the state related to co-moderator's attendance at the 2008 Training Conference.

Institute Supplies and Expense

23. Moderator will receive all of the necessary manuals and reference books directly from NAIFA. Moderators may only use institute approved materials.
24. A roster with full participant information and the LILI order form should be forwarded to NAIFA staff liaison approximately 60 days prior to the expected institute start date.

25. NAIFA requires two weeks notice to fulfill institute requests for student materials. An additional 30 days lead time is required for the moderator or sponsor state to prepare and ship advance materials to students. *Please do not begin a class without planning to receive the materials from NAIFA at least 30 days prior to the institute start date.*
26. **The sponsor state will be billed by NAIFA for participant materials immediately upon shipment. Please pay as directed. The 2009 NAIFA student fee is \$385 per participant. The state may increase NAIFA student fee to cover any additional costs incurred by the state related to hosting the institute.**
27. If sponsor state is utilizing a moderator from another state, sponsor state and moderator should agree on reimbursement for moderator's monthly travel expenses prior to starting the institute. Reimbursements should be limited to actual expenses incurred. It would typically include air and ground transportation, parking, hotel, meals and money for basic supplies and copies.
28. Gifts from students to moderators at graduation are not in violation of this policy.
29. **Cancellation Policy:** NAIFA *will not* issue credit or refund to sponsor state or student for NAIFA student fee in the event of student cancellation. If the state is hosting a second institute *within the same year* (with start no later than June 30) and has complete set(s) of unused textbooks, these can be retained by the state and used for the second institute. In this case, the state must notify NAIFA *at the time the order is placed*. NAIFA will adjust the shipment and invoice the state for the total number of actual students less the cost of unused textbooks retained by the state.
30. **Unused Textbooks:** NAIFA will deduct the cost of (or issue credit) for *unused* text books as follows: If the state is only hosting one institute per year and has unused text books due to a cancellation, these can be used the next year *provided that there has been no change of required textbooks*. Example 1: State has cancellation for institute scheduled to start in January 2009 and has one complete set of unused textbooks but is not hosting another institute until 2010. If the required textbooks are the same for 2010, the state can use these for 2010 and *advise NAIFA when it orders student materials* for 2010. NAIFA will then send one less set of textbooks and reduce the invoice accordingly (NAIFA student fee less the cost of one set of textbooks). Note that *Student Guides* cannot be carried over from one year to the next because they are revised each year. No credit or refund is issued *Student Guides* from the previous year.

Process to Appeal LILI Policy

31. Submit your request in writing to the LILI chairperson for review by the LILI Subcommittee with your reasons for the request and your logic why this will uphold the high standards of LILI. LILI policies and decisions are subject to review by the Committee on Associations and the NAIFA Board of Trustees.

Student Statement of Understanding

32. Homework: **Do not read ahead** as it is important to have the class at the same point of discovery. The homework must be done between classes. One person's lack of preparation will negatively affect the whole class.
33. A two-year pledge of volunteer service in your local association is required.
34. The first and last classes, including graduation, are required to graduate. A student cannot graduate with two missed classes. The cost of missing a session is enormous. Any session missed must be due to exceptional circumstances beyond control of the student.
35. One of the most important elements of the LILI curriculum is the writing of six key documents which allows the students to graduate in month six. Each of these documents is "required" and all are due at different times, which will be indicated by the moderator once the institute has begun. Details will also be provided to assist each student in this important process which includes: helpful hints on how to get started, specific definitions of guiding principles, vision and mission statements, practical tips on drafting business plans and partial samples of finished documents.

The Six Documents Required To Graduate:

- a. Write your own "Eulogy"
 - b. List of Guiding Principles
 - c. Personal Vision Statement
 - d. Personal Mission Statement
 - e. Business Plan
 - f. Define two-year plan for volunteer service in writing
36. Set up group e-mail by first class to improve communications.
 37. **Confidentiality is a must! Whatever is said in the classroom stays in the classroom!**
 38. Communicate any potential conflicts as early as possible to moderator.
 39. Always bring your *Student Guide*, textbooks and journal to class.
 40. **The decision to take LILI is a personal choice.** Mandating or requiring anyone to take LILI is in violation of NAIFA-LILI policy.

Approved by the NAIFA Board of Trustees on September 9, 2005

Updated for 2009 on February 1, 2008