



CIRCLE OF EXCELLENCE RECOGNITION PROGRAM▲

2012-2013 PROGRAM GUIDE



Circle of Excellence Recognition Program

The Circle of Excellence Recognition Program provides chapter leaders and committee and task force chairmen with structure and guidance to achieve strategic, chapter and member goals. The CPCU Society looks forward to recognizing chapters for all of their hard work, innovative ideas and accomplishments during the chapter year!

7 Reasons to Participate in the Circle of Excellence Recognition Program

1. Grow your chapter by delivering value and services to your members in the areas of technical education, promoting professional qualifications of CPCUs and promoting risk management and insurance as a career.
2. The Circle of Excellence program provides direction for the year and is an excellent planning guide.
3. Support the Society's Strategic Plan – the Circle of Excellence provides a blueprint to help chapters align their efforts with the Society's goals and initiatives in each area of emphasis.
4. Focus your efforts. The activities are good suggestions for chapter projects and programs and facilitate delegation and accountability.
5. Earn recognition for your chapter. Chapters are recognized at the Annual Meeting, in the *CPCU News* and *E-Link*, on the Society website and on your chapter website. Chapters are given a medallion to display at chapter meetings.
6. Write your chapter's history! The Circle of Excellence report is an excellent record of your chapter's achievements for the year. It can be a wonderful resource for future chapter leaders and those who are interested in tracking the activities and progress of the chapter over time.
7. Share your successes and contribute to chapter best practices.

The Circle of Excellence is based upon the Society's Strategic Plan and is divided into four Areas of Emphasis – Access to technical insurance knowledge, promoting the professional qualifications of CPCUs, promoting risk management and insurance as a career, and chapter best practices. Each Area of Emphasis includes suggested activities that either support the stated strategic goal and strategy or support chapter best practices.

Circle of Excellence Recognition Program Submissions

Planning:

- Start early! Many chapters use the criteria as the agenda for their summer planning. Hold a formal planning session.
- Delegate! Assign volunteers to committees or task forces early in the year.
- The activities listed are suggestions. Work with your chapter officers to determine which will be most effective for your chapter. Enlist the help of your governor for ideas on ways to improve your chapter value and set realistic goals for your chapter. Invite your governor to attend your planning meeting or arrange for a conference call connection, if possible.
- Document and track progress throughout the year - don't wait until the last minute.

Reporting:

- **Activities must be completed between June 1, 2012 and December 31, 2013 to receive credit.**
- Submit your report in the manner and in accordance with the deadline provided to you by your Chapter Governor.

For questions on the Circle of Excellence Recognition Program, contact your Chapter Governor.

Strategic Goal #1

Provide access to technical insurance knowledge on current industry issues to assure members have relevant knowledge

A. Increase the hours of technical insurance education delivered

[1] Work with chapter members who have designated a primary area of interest among the Society's Interest Groups to plan and conduct an educational program.

[2] Conduct a chapter-developed technical workshop or seminar (longer than a chapter meeting). Request an exit survey from attendees that rates the program on at least 4 on a 5 point scale

[3] Conduct or co-conduct an I-Day to provide multiple educational topics for an insurance industry audience. Request an exit survey from attendees that rates the program on at least 4 on a 5 point scale. e.g. technical program(s), ethics program(s)

[4] Partner with the CPCU Society to co-sponsor a technical workshop in your local area.

[5] Conduct or co-conduct a joint educational activity with another insurance group in your community, other than another CPCU chapter.

[6] Promote The Institutes' Community page as a place for Society members to share their expertise.

[7] Encourage members to utilize the Society's LinkedIn and Facebook presence to engage in dialogue with each other and share technical expertise.

[8] Increase the number of CPD qualifiers in the chapter over the previous year. (Activities to promote this result are, for example: provide CPD "Certificates" for chapter events; provide a link to the on-line CPD application on your website; recognize qualifiers in chapter publications, periodically remind members to file, etc.)

[9] Publish technical articles in The Institutes' Community for the CPCU Society, link to the Society LinkedIn and Facebook and promote to members, employers and/or other insurance professionals.

[10] Submit an article to an Interest Group newsletter. (Send to Mark Dolinski – Interest Group Specialist, mdolinski@cpcusociety.org)

[11] Conduct a joint networking meeting with another insurance organization, such as RIMS, Insurance Women, Agents' Association, etc. (not another CPCU Society Chapter).

[12] Promote attendance by the general membership at the CPCU Society's Annual Meeting and Seminars.

B. Increase the Number of Individuals taking their first CPCU Exam

[1] Work with your Sales Executives from the Institutes on a joint presentation or booth at a local company/agency office or industry convention.

[2] Conduct an activity within the property/casualty insurance industry to attract a diverse pool of *new* candidates to begin CPCU and/or one of The Institutes programs. Use of Society resources such as the "CPCU Experience" video and the "Why Become a CPCU" speech in such an activity is encouraged.

[3] Encourage chapter members to participate in the "Each One Reach One" candidate recruitment campaign, and to complete the form available online on the Society's website.

[4] Using the Institutes' list of exam completers, contact students in your chapter area who have recently completed an Institute program other than CPCU and encourage them to begin their CPCU studies.

Strategic Goal #2

Promote the professional qualifications of CPCUs

A. Increase the Number Who Complete Their CPCU Designation

[1] Conduct or sponsor formal CPCU or other Institute study classes.

[2] Using The Institutes list of new students, contact new students as they begin their CPCU studies to welcome them and offer them support and assistance from the chapter, such as a mentor.

[3] Conduct a program designed to *retain* candidates and reduce barriers to completion of the CPCU designation program. Establish a chapter program to mentor students, or expand upon an existing mentoring program.

[4] Conduct a program for your candidates to promote Membership in the Society as a candidate. For candidates with four or more parts completed, the program should strongly encourage candidate membership. For candidates with fewer than four parts completed, the program should acquaint them with membership as a candidate and strive to build interest in attaining their CPCU and becoming a member.

[5] Conduct a program to acquaint candidate members with the Society's Interest Groups.

[6] Contact potential completers (i.e. 6 or 7 parts completed) to encourage and support completion of the designation.

B. Increase the Conversion Rate for New CPCUs

[1] Conduct a local Conferment ceremony for your new designees.

[2] Conduct an activity (other than Conferment) designed to welcome, recognize, and involve new designees.

[3] Help new designees and transferring members develop an understanding of chapter operations and activities. Provide opportunities for them to become actively involved in the chapter, and maximize their networking opportunities.

C. Increase Retention of Members

[1] Keep your membership list up-to-date. Regularly obtain updated membership data from the CPCU Society website and advise Malvern of any changes. Remind members to update their records.

[2] Prominently display a welcoming message on your chapter's website that provides (or links to) a thumbnail sketch of your chapter – e.g. the chapter officers, when and where the next meeting will be held and how to sign up for it (or a link to the chapter's calendar with similar information), and how to transfer membership into the chapter.

[3] Conduct an activity or program designed to locate and renew "*lapsed*" (*non-paid*) members.

[4] Conduct an activity to increase the participation of *retired* members.

[5] "Bring a fellow CPCU to" Conduct a meeting or event designed to welcome back CPCU members who have not attended a chapter meeting lately, or don't attend often.

D. Increase Recognition of the CPCU Designation

[1] Actively encourage "Spread the Word" activities by your members. Empower them to "spread the word" about CPCU to employers, customers and the general public. Society resources are available to members through the chapter (e.g. Society press releases, the "CPCU Experience" video, model speeches such as "Why Choose a CPCU," etc) .

[2] Track the "Spread the Word" activities of your members. Recognize these members. Use chapter meetings, chapter website, chaptergram, president's message, etc. to communicate the progress of the campaign to members.

[3] Encourage members to share their successes in promoting the designation by submitting their stories to Malvern.

[4] Conduct a good works project and *publicize it* in your local press, chaptergram and website. Consider partnering with an employer to conduct the project.

[5] Place an approved chapter ad in a local or regional P/C industry or business publication. Consider using the Society's co-op advertising program which provides matching funds to help with the placement of ads. (Information on this program is available through the Society's Member Resource Center, or see the Society's website under Chapters > Chapter Promotional Tools > Co-op Advertising.)

[6] Promote chapter educational events to employers, non-members, members and/or the public (use e-mail, mail, chapter website, ads or press releases).

[7] Have members deliver at least two presentations on insurance topics, careers in insurance or ethics to local employers, or to local business or consumer groups.

[8] Issue a "CPCU Excellence" Award to a local employer, CPCU member, CPCU Instructor or volunteer leader. Use a press release or ad to publicize the award.

[9] Conduct or co-conduct a joint educational or networking activity with a non-insurance group in your community. The activity should build awareness of CPCU while delivering useful information to the audience.

[10] Conduct a scholarship program for students and *promote it* in the local press and chapter publications. Describe how the scholarship program was promoted and the publicity the winner received in the local press and chapter publications.

[11] Conduct a chapter developed Ethics Awareness Month activity.

[12] Publish an ethics article on your website or in your chaptergram.

[13] Conduct an ethics exercise during a regular chapter meeting.

[14] Conduct an ethics activity with another insurance industry organization such as RIMS, Insurance Women, Agents' Association.

[15] Present or co-present an ethics-related program to a *non-insurance group* (students, business, civic or professional group, etc.).

[16] Place an approved chapter ad in a local publication that helps to raise public awareness of the ethical commitments of CPCU Society members. Material is available from the Society's Member Resource Center.

Strategic Goal 3

Promote Risk Management and Insurance as a Career

A. Increase the Number of Students Who Choose Risk Management and Insurance as a Career

- [1] Identify a Chapter Liaison who can contact local colleges and universities about their RMI program.
- [2] Identify RMI programs in your area and make contact to explain how the chapter can help students.
- [3] Mentor college students about opportunities for insurance careers.
- [4] Survey employers in your area about potential internship opportunities – Local carriers and local and regional agents and brokers – report the programs to Adam Carmichael Carmichael@TheInstitutes.org to get the program added to an inventory of internships.
- [5] Provide copies of successful internship programs in your area so that best practices can be compiled and shared with others.
- [6] Conduct a joint educational or networking activity with a local chapter of Gamma Iota Sigma (the fraternity for Risk Management, Insurance and Actuarial Science majors).
- [7] Participate in the Loman Internship/Scholarship Program by contributing funds and identifying recipients.
- [8] Promote support of the CPCU-Loman Education Foundation.
- [9] Conduct an educational program or activity (other than a scholarship) with local college students or local high school students (e.g. Driving Safety, Career Day, Project InVest, etc.).
- [10] Conduct an activity that targets the entrance of a diverse group of new professionals (*such as college seniors, recent college graduates or job/career re-trainees*) into the industry and puts them onto the road to CPCU Society membership.
- [11] Conduct an activity designed to reach out to *high school and undergraduate college students* to encourage them to choose insurance as their careers.

Area of Emphasis #4

Chapter Best Practices and Governance

A. Chapter Governance – Ensure the Chapter is in Compliance with Not-For-Profit Laws

[1] Submit names of your new chapter officers and committee chairs to the Society.
(Note: additional chairs can be added during the year as appointed).

[2] Work with the Society to complete all reporting, filing, financial and operational guidelines.

B. Focus Chapter Planning on Strategic Goals

[1] Send one or more members of chapter leadership to the 2013 Leadership Summit.

[2] Conduct a chapter planning session annually to establish goals and objectives for the upcoming year consistent with the Society's Strategic Plan. Consider inviting your Chapter Governor to this meeting.

[3] Send your planning document to your Chapter Governor and to Malvern at the beginning of the chapter year (suggested by January 30).

C. Chapter Leadership – Increase the Number Serving in Leadership Roles

[1] Develop your chapter's leaders. This includes appointment of committee/task force chairs, recruiting new members for chapter activities or tasks, and recognition for chapter leaders.

[2] Encourage members to volunteer for chapter service.

[3] Motivate experienced chapter leaders to apply for CPCU Society service (Director, Chapter Governor, Committee, Task Force, etc.)

[4] Recognize your chapter's volunteer leaders (i.e., awards, notice in Chaptergram, Society Marketplace gifts, letter to employer, etc.)