

Circle of Excellence Program Update and Guidelines for 2012-2013

Circle of Excellence Purpose statement:

The CPCU Society Chapter Circle of Excellence Program serves to:

- Establish the alignment of chapter plans with the strategic goals of the CPCU Society
- Provide a platform for measuring the results of Chapter activities
- Provide recognition for chapters that promote the continuing education of its members and the value of the CPCU designation
- Promote sharing of best practices and ideas among all chapters

Chapter leaders:

Based on feedback received from the Chapter Leader survey in January, the Chapter Governors recently adopted a new format for the Circle of Excellence program. Below are links to the updated 2012-2013 Circle of Excellence Program. These documents will also be added to the Society's website.

2012-2013 Circle of Excellence Program Guide

2012-2013 Circle of Excellence Chapter Plan

The guidelines for implementation of the new program are as follows:

- **The COE for 2012-2013 will start June 1, 2012, and end December 31, 2013.** Chapters have 18 months to complete their COE given the change in the Society's Strategic Plan and the Society's change to a calendar year.
- While the COE Program Guide is an excellent tool to help plan activities, ***chapters are encouraged to "think outside the box" and use creativity to adopt and try new ideas*** as well.
- Every chapter is requested to submit a "Chapter Plan" to their Chapter Governor by Friday, August 31. The Chapter plan should indicate the 3-5 planned major activities for each of the CPCU Society strategies. While chapters may pursue additional activities to support each strategy, it is not necessary to list every single activity. ***The expectation is that chapter plans will be no more than 1-2 pages in length.***
- For the Chapter Plan, **there are no specific requirements based on chapter size.** Each Chapter's Board has the autonomy and discretion to establish plans in conjunction with the availability of resources in your chapter.

- Chapter Governors will review the chapter plans and provide any necessary feedback during the month of September. Ideally, your Chapter Governor will have already been involved in the chapter's planning process.
- By December 31, 2013, chapters will complete a report that *summarizes* the key accomplishments and highlights the extent to which the plan was achieved. Chapters can use the same Chapter Plan document for reporting purposes.
- During January, 2014, Chapter Governors will review the reports from each of their respective chapters and provide feedback. **Circle of Excellence recognition will be awarded by your Chapter Governor based on the chapter's performance against its planned objectives.**
- Results-Oriented Programs are Desired. Changes to the Circle of Excellence will focus on results. One of the most important ways that a chapter can determine whether or not their programs are having the desired result and bringing value to members is through measuring the following:
 - Hours of technical insurance education delivered
 - Number of individuals taking their first CPCU exam
 - Total paid membership
 - Membership conversion rate for new CPCUs
 - Membership retention rate
- A two-tiered system for COE recognition will be determined as follows by the Chapter Governor:

GOLD: Chapter met and sometimes exceeded their planned objectives

SILVER: Chapter substantially achieved most but not all planned objectives

Please feel free to direct any questions on the new program to your Chapter Governor.