



Application for CPCU Society Service

Leadership Council ☐ Interest Group Governor ☐ Chapter Governor ☐ Standing Committee
☐ Officer ☐ Director ☐ Interest Group Committee ☐ Task Force

Our mission statement defines the future of the CPCU Society. Our success in carrying out that mission depends upon the quality and effectiveness of our volunteer leaders. Your willingness, as a volunteer, to offer your time and talents is vital to our continued success.

There are many ways to apply your skills at the CPCU Society level. For each position, we have included a brief description of duties, time requirements, competencies and experience desired. For a complete description of each position, the anticipated time and financial commitments required and competency definitions, visit the CPCU Society website at www.cpcusociety.org.

Name		
Company	Title	
Preferred Mailing Address		
City, State, Zip		
Phone	Fax	Email Address
CPCU Society Member ID #	Designation Year	
Current Chapter/Interest Group	Region	

Personal Data

In addition to completing the sections below, please attach your résumé or curriculum vitae.

Volunteerism and Continuing Education

If you have held the same office or volunteer position for non-consecutive terms, please list each separately and indicate year served.

Highest CPCU Chapter Office Held/Year:
Chapter Committee Work:
Highest CPCU Society Position Held/Year:
CPCU Society Committees/Interest Groups/Task Forces/Year:
Other Professional Designations:
Other Insurance Activities: (organization/highest office/year):
Other Volunteer Activities/Achievements/Special Awards/Publications/Year:
Insurance-Related Studies/Year:

References

All candidates expressing serious interest will provide the names of two to three references, including their email address or phone number at a minimum.

Commitment Statement

Please summarize your professional competencies and how you will use them to further the Society's mission (200–250 words or less).

Loman Club Member

- ☐ **Yes**, I am currently a member of the Loman Club. ☐ **No**, I am not a member of the Loman Club.
-

Candidate Interests

Elected Offices

The name of the applicant receiving a nomination for these positions will be submitted to Society membership for election.

☐ **Leadership Council Officer:**

☐ **Vice President** (Four-Year Commitment. Application Deadline: Dec. 31)

Desired experience for this position includes leadership roles in local chapters and/or interest groups, and CPCU Society committee or task force work. Demonstrated leadership experience in business, professional or nonprofit organizations is also required. If nominated, the applicant is expected to be highly visible, represent the Society at various public functions, attend all required meetings, and automatically move into the president-elect, president and chairman, and immediate past president offices. Desired competencies include high energy, vision, organizational and interpersonal skills, and the ability to command, communicate and motivate.

☐ **Secretary** (Three-Year Commitment. Application Deadline: Dec. 31)

This position shall be responsible to keep an accurate record of all meetings of the Society, the Leadership Council, and the Executive Committee. The secretary helps interpret the bylaws and makes sure the organization complies with any regulations pertaining to not-for-profits. Attendance at all CPCU Society Leadership Council and Executive Committee meetings is required.

☐ **Treasurer** (Three-Year Commitment. Application Deadline: Dec. 31)

This position shall chair the Budget & Finance Committee, submit periodic financial statements to the Leadership Council and to the members of the Society, and assure that financial accounts of the Society shall at all times be open to the inspection of any member and of any authorized auditors. Attendance at all Leadership Council and Executive Committee meetings is required.

☐ **Leadership Council Member** (Three-Year Term. Application Deadline: Dec. 31)

This position addresses CPCU Society concerns. Attendance at all CPCU Society Leadership Council meetings is required. Demonstrated leadership experience in business, professional, or nonprofit organizations, and local chapter or CPCU Society committee/task force is suggested.

☐ **Chapter Governor** (Three-Year Term. Application Deadline: Dec. 1)

This position serves as a liaison between the Leadership Council and the chapters and they facilitate communication between the Leadership Council and chapter officers. Attendance at all chapter governors meetings is required.

☐ **Interest Group Governor** (Three-Year Term. Application Deadline: Dec. 1)

This position serves as a liaison between the Leadership Council and the interest groups and they facilitate communication between the Leadership Council and Interest Group Leadership. Attendance at all interest group governors meetings is required.

Work Experience and Leadership Roles at Work

Please elaborate on the content of your résumé by providing two to three specific examples demonstrating leadership skills, such as influencing others, building relationships or being innovative (200–250 words or less).

Appointed Positions: (Indicate First, Second and Third Choice.)

Appointed positions include CPCU Society Standing Committee and Interest Group Committee service.

☐ Standing Committees

(Three-Year Commitment. Nominating Committee Application Deadline: Dec. 31; Other Standing Committees Application Deadline: May 15)

____ Budget & Finance ____ Diversity ____ Ethics ____ Nominating

Four Standing Committees are focused on the ongoing needs of the Society. CPCU Society committees do not change from year to year. A commitment to promote the best interests of the CPCU Society is required. For Budget & Finance, applicants should have appropriate functional skills.

☐ Interest Group Committees (Three-Year Commitment. Application Deadline: May 15)

Interest groups operate within the organizational framework of the CPCU Society and support the overall Society mission. Their specific focus and perspective are centered on common issues affecting their interest groups. Many of their activities relate to the educational needs of their interest group members. This position requires attendance at all CPCU Society meetings. Typical projects include seminars, symposia, publications, newsletters and research. Desired competencies include functional/technical skills, business acumen, planning and organizing.

____ Agent & Broker	____ Information Technology	____ Regulatory & Legislative
____ Claims	____ International Insurance	____ Reinsurance
____ Coverage, Litigators, Educators & Witnesses	____ Leadership & Managerial Excellence	____ Retirement Resource
____ Excess/Surplus/Specialty Lines	____ Loss Control	____ Risk Management
	____ Personal Lines	____ Underwriting

☐ Task Forces

Task forces are created by the CPCU Society Leadership Council to advance the Society's strategic objectives and address specific interests or needs within a six- to eighteen-month timeframe. Task forces research specific issues and provide the Leadership Council with recommendations about viable options and potential action plans. Typically, task forces meet twice a year: once at the Annual Meeting and once in the spring, in conjunction with the Society's Leadership Summit. Additional meetings are called at the discretion of the task force leader, and may be conducted virtually.

Please indicate your participation preference: ☐ Task Force Chair ☐ Task Force Member

I have skills and interests in the following areas: (check all that apply)

<input type="checkbox"/> Annual Meeting	<input type="checkbox"/> Human Resources	<input type="checkbox"/> Publications
<input type="checkbox"/> Audit/Budget/Finance	<input type="checkbox"/> Information Technology	<input type="checkbox"/> Public Relations
<input type="checkbox"/> Bylaws Knowledge	<input type="checkbox"/> Leadership Development	<input type="checkbox"/> Public Speaking
<input type="checkbox"/> Candidate Development	<input type="checkbox"/> Marketing	<input type="checkbox"/> Regulatory & Legislative Matters
<input type="checkbox"/> Candidate Recruitment	<input type="checkbox"/> Membership	<input type="checkbox"/> Research/Statistics
<input type="checkbox"/> Chapter Operations	<input type="checkbox"/> Negotiation	<input type="checkbox"/> Strategic Planning
<input type="checkbox"/> Communications Strategy	<input type="checkbox"/> Parliamentary Procedures	<input type="checkbox"/> Other _____

Submit completed application and all attachments in one of the following ways:

Mail: Executive Assistant, CPCU Society, 720 Providence Road, Malvern, PA 19355

Email: mdrager@cpcusociety.org

Fax: (610) 251-2761; Attention: Executive Assistant