



**CPCU**  
SOCIETY

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## Iowa Chapter

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Officer, Directors, and Committee Chairs  
Job Descriptions and Responsibilities

## IOWA CPCU CHAPTER JOB DESCRIPTIONS (updated May 2014)

Chapter officers and directors are expected to participate in **all** monthly meetings of the Board of Directors, reporting on activities of committees and task forces. Committee and task force chairpersons are expected to participate in “**full**” board meetings which are scheduled **bi-monthly**. (Alternate bi-monthly board meetings are executive meetings for officers and directors only.) Each board member is expected to review job-specific duties with the incoming board member at the end of the chapter year, if applicable. All board members are expected to responsibly safeguard the chapter’s budget. Specific responsibilities are listed with each job description.

### Chapter President

The chapter president keeps the chapter focused on establishing and meeting local and Society goals, along with encouraging future leaders and giving guidance to officers, directors, and other board members. The president reports to the Society office and its representatives as required.

#### Prior to Presidential term

- Informs Society office of new officers/chairpersons and keeps list current.
- Determine times and locations of Board meetings prior to first Board meeting. 1<sup>st</sup> or 2<sup>nd</sup> Wednesday of every month, 3pm – 4:30pm. Need to allow enough time for the arrival of month end financials. Executive Committee meetings 3:30 – 4:30pm
- Schedule a late fall meeting with Officers to develop budget for upcoming year.
- Negotiate management company contract in the fall.

#### Specific Dates

- Fall: Attend CPCU Society Annual Meeting and plan a Chapter reception at the convention. National will check with President to see if a room is needed and book the reception rooms. Then they will assign a contact at the hotel to make reservations.
- Septebmer: Determine recipient of Excellence Award.
- I-Day (if requested by VP or committee planing I-Day)
  - Speak and introduce speakers at I-Day Luncheon.
  - Coordinate w/ New Designee Rep for graduation ceremony. Either President reads names, or finds someone to read names, & shake the hands. New Designee Rep gets group lined up for graduation ceremony, photo, etc.
  - Introduce the Burkhalter Award.(The award can be picked up at American Awards on Ingersoll Ave)
  - Line up someone to confer the officers (past president or senior society chair person). Script is in the Duties section of the Chapter Leaders Guide & on the society website.
- August: Work with committee to determine Officers and Directors slate for the next year. (Committee: Immediate Past President as chair; President & Ted Lussem)
- September: Chapter Meeting - announce the nominees and lead the nomination & vote. Include the nominees in the October Chaptergram.

#### Ongoing / Monthly

- Set the board agenda and distribute prior to meeting to the Executive/Full Board of Directors.
- Write President’s Message for the monthly ChapterGram.
- Directs chapter board meetings and gives general direction to officers, directors, and committee/task force chairpersons/encourages board members to recruit new leaders.

- Directs full board in Circle of Excellence submission and oversees submission to the CPCU Society.
- Monitors progress of chapter goals and objectives.
- Encourages new ideas with events, meetings, and getting others involved.
- Responsible for contractual commitments of the chapter, overall fiscal responsibility for the chapter, and compliance with chapter by-laws.
- Works with Society headquarters to communicate members' needs / serves as liaison between the international Society organization and the local chapter.

## **Vice President**

The vice president assists the chapter president with duties as assigned and oversees the programs for the chapter year. The vice president initiates annual updating of the chapter's plan, including establishing objectives for his or her term as president, and serves as a liaison to other insurance organizations.

### **Prior to Vice President Term**

- Directs program task force to plan meetings for the fiscal year, requesting registration table and chairs when making meeting reservations.
- Have monthly meeting locations nailed down by July for that year so the schedule can be published for magnetic holders and on website.
- Determine if doing speaker gifts and if so, order the gifts.

### **I-Day**

- See I-Day check list from prior VP.
- Arrive 60 minutes early.
- I-Day Brochure:
  - a. Design by July, providing all content and photos.
  - b. Print in August (2,000)
  - c. Start distribution in September (Ted delivers 1,200 to Big I)
  - d. Download mailing list of current members from CPCU website, Chapter Leaders section, and mail brochure to members.
- Keep reserve of brochures for the day of to put at each place in meeting.
- Download list of CPD Qualifiers. Print names on handout, or include in the brochure. The flyer can also notify of speaker changes.
- Ensure New Designees packets are prepared, collaborate with New Designee Chair.

### **Ongoing / Monthly**

- Promotes monthly meetings; sends information to Chaptergram editor & webmaster for publishing, including program details, directions, & special entrance/parking instructions.
- Oversees overall coordination of monthly meetings and I-Day activities, including a local conferment ceremony for new designees.
- Sends thank you notes or emails to speakers following events.
- Notify the association management company of speaker reservation each month.
- On Friday or Monday (depending upon venue requirements) obtain a registration count from the association management company.
- Follow-up with event location and speaker one month before meeting to make sure everything is still good. Ask venue to have a registration table available. At that time find out if speaker needs AV equipment and request Bio.
- Take to every meeting:
  - a. Podium banner

- b. Speaker gift
- c. Speaker Bio
- d. Raffle gifts
- e. Exit Surveys and pens
- f. If the speaker needs a projector and/or laptop, usually a board member or director will bring to the meeting. (Costly to rent from venue.) Advise the venue you will need a screen and projection table.
- Monthly Meeting Agendas: arrive ½ hour early to meetings to make sure everything was set up okay and to set up projector and laptop if need be.
  - First 30 minutes of meeting for networking and eating. (feed the speakers table first) ex. 11:30 – 12:00pm
  - Speaker to talk for 45 minutes. (ex. 12:00 – 12:45pm)
  - Close meeting with raffle (if applicable) and next meeting announcement.
- Encourages others to get involved with chapter & encourages new ideas for recruiting.
- Serves as substitute for chapter president when necessary, including board meetings.
- Manages inventory of supplies. (Banners, speaker gifts, raffle tickets, etc.)

## Secretary

The chapter secretary keeps a permanent record of board meetings. The secretary is also responsible for overseeing communication with chapter members.

### Prior to Secretary Term

- Meet with outgoing Secretary late fall to understand functionality of the position.
- Meet with Board of Directors late fall to develop budget for upcoming year.
- Maintain copies of contracts, chapter by-laws and certificates of insurance.
  - Mid to late summer distribute to Executive Board the Critical Information file containing: insurance info, tax Id #; association management contract details, banking contacts and CPA contacts.

### Specific Dates

- March board meeting – start thinking about CPCU Excellence Award to be given out in November meeting.
- November/December- Receive certificate from National for outgoing President; sign document along with VP.

### Ongoing / Monthly

- Take notes and compile Board Meeting minutes.
- Distribute minutes to all Board Members prior to upcoming Board Meeting.
- Help Treasurer and Vice President at the monthly meetings as needed. (set up, name badges, distribute and collect surveys, etc.)
- Writes monthly email to members notifying of upcoming meeting registration and posting of Chaptergram. (to be sent around the 1<sup>st</sup> of the month, if not before)
  - verify meeting registration and Chaptergram are posted correctly, advise webmaster if not.
  - Type email exactly how it should be sent.
  - Send email to the association management company for distribution.
- Oversees the production of Chaptergram and assists editor as necessary.
- Maintains copies of contracts, chapter by-laws and certificate of insurance.

### Preparation for VP Term:

- May/June, start planning the dates, locations and speakers for the next term as VP.
  - Create Program Planning Committee, if desired.

- Secure I-Day Date, Location & CPCU Society President
- Get a commitment for the following about a year in advance:
  - a. National CPCU officer for conferment ceremony.
  - b. Local company to sponsor speaker's dinner the night before.
  - c. Planning Committee for next year's meetings and I-Day.
  - d. Printing of Brochure for I-Day.
  - e. Seek corporate sponsor for Continental breakfast at I-Day.
- Reserve a meeting location for I-Day. Ideally need a place that has two rooms that can accommodate at least 200 people. (one for the meeting, one for the luncheon).

## **Treasurer**

The treasurer serves as chief financial officer for the chapter, overseeing income and expenses, providing monthly financial statements, and monitoring the budget. The treasurer must have a good working relationship with the association management company.

### **Prior to Treasurer Term**

- Meets with outgoing treasurer and administrator to review financial records and functionality of the position.
- Meet with Board of Directors mid to late summer to develop budget for upcoming year; work with President to coordinate date, location and update budget worksheet prior to meeting.
- Serves as primary contact for bank, auditors and the association management company.

### **Specific Dates**

- Prior to 1<sup>st</sup> meeting: Coordinate pickup and drop off of monthly registration list, name badges, and raffle tickets from the association management company before and after monthly Chapter meetings.
- I-Day: Coordinate help for registration desk, arrive 60 minutes early.
- February-March: Tax Form 990 for the year ended 12.31 to file by due date of May 15 – sign & approve for tax group
  - Notify Chaptergram editor to make a notice that the tax forms are available for review.
- April: Attends National Leadership Summit for chapter training if possible. Seek out incoming President to secure attendance for the following year's I-Day.
- December meeting: report on financial status at Chapter luncheon.
- Files annual tax return & keeps official records such as IRS exempt status documentation, Federal Tax ID number, general ledger, and tax returns. (at least four years).

### **Ongoing / Monthly**

- Oversee income and expenses of the Chapter.
- Monitor the Chapter budget.
- Works with administrator to prepare for monthly meetings; responsible for picking up registration list, name badges, and petty cash (if necessary) at the association management company and returning list, badges, and payments received.
- Serves at registration desk for meetings (arriving early), marking attendees/substitutions & payments on the list, collecting payment from unpaid registrants & signing receipts for payments if necessary.
- Manages cash (deposits and withdrawals) in accordance with chapter procedures & with supporting documentation; approves expenses prior to the administrator writing checks.
- Works with administrator to categorize income and expenses appropriately.

- Monitors budget and reviews monthly financial reports prior to distributing to board members.
- Distribute monthly financial statements to the Executive/Full Board of Directors.
- Maintain good working relationship with our association management company.
- Transport name badges and registration list to monthly Chapter meetings.
- Arrive 30 (all other mtgs) or 60(I-Day) minutes early for monthly Chapter meetings serving as the registration desk attendant. Noting substitutions, accept walk in registrations, & provide receipts when needed.
- Approve & categorize expenses prior to management company producing checks.
- Arrange for timely receipt and review of monthly financial reports from the management company prior to distribution for the Chapter Executive/Full Board meetings.
- Monitor credit card registration receipts received from the online meeting reservation company. Need to manage the payment process.
- Monitor supplies with the association management company including: name tags, badges, Board member/speaker flags, and raffle tickets.

### **Immediate Past President**

The immediate past president serves as an advisor to the chapter president, chairs the nominating committee for future officers, and conducts special projects as requested.

- Serves as chair of nominating committee to identify future officer & director candidates.
- Conducts special projects to benefit the chapter at the request of the president.
- Provides advice and counsel as needed to chapter officers and directors.

### **Directors—Internal Operations, Member Activities, Communications, & Professional Development**

#### ***INTERNAL OPERATIONS***

#### ***Director of Internal Operations***

The Director of Internal Operations monitors activities related to the efficient operation of the Iowa CPCU Society Chapter. These include: our annual submission to the CPCU Society for the Circle of Excellence award; Industry Visibility; the Past Presidents' Club; and Historian activities.

#### **Circle of Excellence**

Monitors the progress towards attaining the Circle of Excellence award for the Iowa Chapter.

- Responsible for submitting the Iowa Chapter plan to the CPCU Society by December 31<sup>st</sup>.
- Maintains a list of activities that the Iowa Chapter has undertaken in progress towards attaining this award.
- Makes periodic reports to the officers and directors on the progress of the chapter towards this award.
- Responsible for submitting the award application to the CPCU Society prior to January 1<sup>st</sup>.

## **Industry Visibility**

Develops and facilitates programs to enhance the visibility of the Iowa CPCU Society Chapter and the CPCU designation.

- Develops relationships with other industry organizations such as the Independent Insurance Agents of Iowa (IIA), Insurance Association of Greater Des Moines (IAGDM); Iowa Insurance Hall of Fame; Independent Insurance Agents of Des Moines.
- Works with the CPCU Society and American Institute for CPCU in arranging events where representatives from those organizations and the Iowa Chapter undertake joint activities to promote the Iowa Chapter and the CPCU designation.
- Works with the Director of Communications and the Public Relations Chair on the I-Day ad and co-op advertising.
- Assists the officers and directors in developing innovative ideas to promote the chapter.

## **Past Presidents' Club**

Serves as a liaison between past presidents of the Iowa Chapter and the current president & officers.

- Organizes at least one meeting a year of the past presidents of the chapter with the current officers/directors to solicit ideas and suggestions for the operations of the chapter.
- Assists with developing business plans for the chapter.

## **Historian**

Keeps a record of the history of the Iowa CPCU Society Chapter.

- Annually updates the chapter history which is published as a part of the chapter directory.
- Keeps a record of the past presidents of the Iowa Chapter.
- Responsible for maintaining an archive of memorabilia (including photos, newspaper articles, and magazine articles) regarding the activities of the Iowa Chapter.

## **Job Description Task Force**

Keeps the Job Description document up to date.

- Works with the executive board to update the job description document as needed.
- Contact the website team to store the word document and place a PDF copy on the Chapter website.

## **MEMBER ACTIVITIES**

### ***Director of Member Activities***

The Director of Member Activities monitors general activities for potential, new, and current CPCU members. These activities include: developing new candidates for the CPCU designation; providing a welcoming environment for new designees; organizing our annual golf outing; fostering interaction of current membership; and keeping membership records current.

## **Candidate Development**

Responsible for developing initiatives to encourage individuals to pursue CPCU/IIA designations and to encourage those who are pursuing a designation to successfully complete the program.

- Stays informed of CPCU and IIA programs to attract new candidates.
- Obtains active candidate lists from the AICPCU office if necessary for special mailings or functions.
- Promotes the Society's candidate membership.
- Recognizes and rewards outstanding instructors, if appropriate.

## **New Designee Representative**

Responsible for planning and facilitating the new designee reception and other activities to integrate new CPCUs into the chapter.

- Notifies board members of new designees when notification is received.
- Sends congratulatory letters to new designees on behalf of the chapter.
- Organizes annual new designee reception to be held in the fall of the year.
- Works with vice president to organize local I-Day conferment to recognize new designees.
- Distributes information and serves as contact person for questions from new designees.
- Develops and facilitates other activities to integrate new designees into the activities of the Iowa Chapter, encouraging new designees to attend meetings and get involved.

## **Golf Event**

Responsible for organizing and promoting this annual event to raise funds for a designated charity.

- Solicits sponsors for holes and makes arrangements for corresponding signs.
- Promotes and publicizes the golf event.
- Works with the officers and directors to identify the charity who will receive proceeds.
- Solicits prizes.
- Coordinates registration.
- Makes recommendation to the officers and directors on the golf course to use.
- Coordinates accommodations with the golf course facility. (including a dinner)

## **Member Interaction**

Creates an outreach program for CPCU meetings to make individuals feel welcome and to facilitate networking. Assists with leadership identification & development and survey activities.

- Receives registration list from treasurer (or administrator) prior to monthly meetings.
- Organizes a welcome committee for CPCU meetings, focusing specifically on new/transferred members and members who have not attended lately.
- Refers potential leaders (or members wanting to get involved) to the CPCU board.
- Assists with survey activities as necessary.

## **Membership/Member Involvement**



Responsible for maintaining the membership records of the Iowa Chapter and for developing strategies to encourage member involvement.

- Works with the Society membership database to analyze chapter membership and provide information as needed for board members / prints lists as needed.
- Acknowledges members who transfer into the chapter / sends welcome letter to transferred members / relays transferred member info to board members.
- Works with members to keep profiles current (including email addresses) / submits changes to the Society office at [membercenter@cpcusociety.org](mailto:membercenter@cpcusociety.org) as necessary.
- Assists administrator with mailing list, in electronic form, for the Chaptergram.
- Manages emails to the chapter membership by working with administrator and resolving email address returns prior to the next (e)mailing.
- Standardizes company names for directory, reviewing **especially** new designee and transferred member information as information arrives.
- Organizes/prints directory once a year prior to I-Day (with board member assistance).
- Checks with members who have not paid their dues (with board member assistance).
- Recruits nonmember CPCUs.
- Emphasizes the value of Society membership to chapter members.
- Works with the board to maintain “Active” membership of at least 75 percent.
- Develops new strategies to enhance member involvement in the activities of the chapter.

### **Good Works**

Coordinates the chapter’s charitable activities.

- Identifies charitable activities and organizations with whom the Iowa Chapter may partner to provide community outreach.
- Coordinates the chapter’s good works activities.

## **COMMUNICATIONS**

### ***Director of Communications***

The Director of Communications oversees activities of the Iowa Chapter related to communication with Chapter members and outside entities. Responsibilities of this position include:

- Maintains the Chapter’s overall Communications Plan.
- Oversees the Chapter’s web presence, including the Chapter website and social media sites.
- Oversees published media, including the New Designee ad, ChapterGram, and photographs at Chapter events.
- Communicates with the Chapter’s Association Manager to ensure communications are timely, accurate, and relevant to Chapter members.

### **Chaptergram Editor**

Responsible for composing the monthly newsletter which is electronically sent to the membership.

- Solicits information and photos that can be included in the monthly Chaptergram.
- Composes the newsletter.
- Forwards newsletter to the officers and directors for their review prior to publication.
- Sends newsletter to web team for posting to the chapter website, with copies to the executive board.

## **Public Relations**

Implements strategies to promote the Iowa CPCU Society Chapter, its activities, and the CPCU designation.

- Responsible for coordination of annual I-Day ad in the DM Register to recognize our new designees, which includes obtaining photos from new designees by a certain deadline.
- Assists in soliciting contributions for the annual I-Day advertisement.
- Forwards membership changes for new designees (including standardization of company names) to Membership chairperson.
- Coordinates co-op advertising that is made available from the CPCU Society.
- Issues press releases & submits articles/photos to CPCU Society News.
- Assists the Chaptergram editor as needed.

## **Website Development**

Responsible for maintenance and enhancements to the website of the Iowa Chapter.

- Updates website with the monthly Chaptergrams.
- Updates with events (such as monthly meetings, Society technical/leadership workshops and golf outing).
- Posts on an annual basis the list of officers, directors, and committee chairs.
- Provides enhancements to the website.

## **Social Media**

Responsible for maintaining and enhancing the Iowa Chapter's presence in social media.

- Post President's Message/ChapterGram, meeting photos, and other relevant and interesting content to Iowa Chapter Facebook and Google+ groups.
- Begin new discussions and monitor/participate in current discussions on Iowa Chapter LinkedIn page.
- Assist website administrators in posting content on Chapter website.
- Monitor changes to the social media environment and recommend to Chapter officers new social media platforms, changes to content preferences of social media users, and other critical changes necessary to maintain a positive social media presence for the Chapter.

## **Photographer**

Responsible for taking pictures at Iowa Chapter events and forwarding photos to the editor, web master, and/or Public Relations chair for publishing in the Chaptergram/website/ archives/CPCU Society News. Signatures may be needed for photo releases.

## **PROFESSIONAL DEVELOPMENT**

### ***Director of Professional Development***

The Director of Professional Development oversees activities of the Iowa Chapter which relate to education and professional development of the membership, including ethics training and posting on an annual basis at least one ethics related article in the Iowa Chapter's Chaptergram.

### **Program Plan/CE Filing**

Responsible for organizing and conducting events to assist members in developing technical and leadership skills.

- Organizes technical workshops.
- Organizes leadership seminars.
- Assists the program chair (the Vice President) in developing and delivering one lunch program during the year.
- Assists the editor of the Chaptergram and web architect in promoting educational and leadership events through posting in the Chaptergram and website.

### **Ethics**

The Ethics Chair is responsible for developing activities for the membership pertaining to adherence to the CPCU designation ethical standards. In conjunction with the Vice President and program committee, the Ethics Chair shall organize one ethics event during the calendar year.

### **Scholarships**

Responsible for administering the annual scholarship program of the Iowa CPCU Society Chapter.

- Writes an article in the Chaptergram to solicit submissions for scholarship applications.
- Develops scholarship application to include with article publication and have available on our website.
- Develops new ways to promote the scholarship program to potential applicants.
- Responsible for gathering and reviewing of scholarship applications.
- Chairs the process of selecting scholarship award winner(s).

### **Iowa Insurance Hall of Fame**

Serves as the liaison from the Iowa CPCU Society Chapter to the Iowa Insurance Hall of Fame.

- Serves on the selection committee of the Iowa Insurance Hall of Fame for new inductees.
- Brings all donation requests from the Hall of Fame to the Iowa Chapter board.
- Attends the annual induction ceremony and banquet.