



CIRCLE **OF** EXCELLENCE
RECOGNITION PROGRAM ▲

2009-2010 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 their hard work, innovative ideas and accomplishments during the chapter year!

6 Reasons to Participate in the Circle of Excellence Recognition Program

1. Help deliver value and services to your members in the areas of visibility, positioning members for success and stewardship of chapter resources.
2. The Circle of Excellence program provides direction for the year and is an excellent planning guide.
3. Support the Society's Strategic Plan – Circle of Excellence provides a blueprint to help chapters align their efforts with the Society's efforts 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 Web site and on your chapter Web site. Chapters are given a plaque 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.

Best Practices: Circle of Excellence Recognition Program Submissions

The following is a list of best practices for your Circle of Excellence submission:

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.
- Enlist the help of your governor for ideas on ways to complete the activities 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 activities throughout the year - don't wait until the last minute to work on your submission.
- Read the full description of each criterion in this Program Guide before you start completing the reporting form. Read the Program Guide as part of your planning process.

Reporting:

- Keep your answers simple and concise, but be specific and supply details (dates, names, topics) where appropriate. One paragraph may be enough for each activity.
- Separate exhibits are not required (other than as requested in the criteria) but chapters may mail examples of their work to Malvern if they choose.
- Each activity may be counted only once. Select the most appropriate category. Exception may be permitted for a program that has multiple sessions, such as I-Days with both technical and leadership programs, proceeds going to scholarships, etc.
- At least one point must be earned under each area of emphasis to qualify for recognition.
- Have board members review the submission for any accomplishments that may have been overlooked.
- Activities must be completed by June 1 to receive credit.
- Submit the reporting form by the deadline: June 1.
- E-Mail your submission. Use the Circle of Excellence Reporting Form template for submission.

For questions on the Circle of Excellence Recognition Program, contact the Society's Chapter Operations Vice President at (800) 932-CPCU, ext. 2716, or send an email to bmidwood@cpcusociety.org.

Submit your report by June 1 to:
chapter.services@cpcusociety.org
FAX: (610) 251-2761
Mailing Address:
Chapter Services
CPCU Society
720 Providence Road
Malvern, PA 19355

What is the Circle of Excellence Program?

The Circle of Excellence Recognition Program recognizes all chapters for their efforts to achieve specific benchmarks in chapter performance. Chapters can earn Bronze, Silver or Gold recognition by undertaking activities in each area of emphasis.

Administration of the Circle of Excellence Recognition Program

The Circle of Excellence Program has been developed to support the CPCU Society's three areas of strategic emphasis: Visibility & Candidate Development, Member Success and Membership & Stewardship.

On the following pages, these three areas of emphasis are outlined in detail along with the various initiatives chapters can complete to qualify for points in the Circle of Excellence Program.

Chapter Size:

The requirements vary by chapter size to encourage all chapters to participate in the program.

<u>Chapter Size</u>	<u>Number of Members *</u>
Small Chapter:	6 – 70
Medium Chapter:	71 – 200
Large Chapter:	201 – 450
Jumbo Chapter:	451 +

*membership is calculated as number of paid members on June 1 (the reporting deadline)

- The number of Circle of Excellence points achieved in each category is dependent on the number of “Bold” and “Non-Bold” activities the chapter completes in each Strategic Goal category. (see point scale following the Recognition Criteria for each Strategic Goal).
- Chapters can earn 1, 2, or 3 Circle of Excellence points for each Strategic Area of Emphasis.
- Bronze, Silver or Gold recognition is based on the number of total points as follows:

Recognition Level	Total Circle of Excellence Points Required
BRONZE	3 – 5 points
SILVER	6 – 7 points
GOLD	8 – 9 points

Area of Emphasis #1

Visibility & Candidate Development

A. Connections/Champions Programs

Chapter Circle of Excellence Criteria:

1A1 [] Establish a Connections Committee. Provide names of committee members.

1A2 [] Develop a list of local P/C companies. Provide list to Malvern with names of key contact people at each employer (consider including HR or training execs.)

1A3 [] Conduct at least one Connections Visit with local employers employing five or more CPCUs.

1A4 [] Conduct additional Connections visit(s) to any local employer(s). Suggestion: consult with your Governor and invite Governor, Society officer or AICPCU representative to attend.

1A5 [] Develop information kit on local chapter activities that can be used during Connections visits. This information should be designed to document the value to employers of employee participation in CPCU study and CPCU Society and chapter programs.

1A6 [] Obtain a list from Malvern of the CPCU Champions in your area. Review the list looking for employers not represented, Champions known to have relocated, or Champions known to have left the industry. Send any updates of the list to Malvern. (Champions are members who will promote the CPCU designation and the CPCU Society to fellow employees and decision makers.)

1A7 [] Identify individual members of your chapter not on Malvern's list of Champions who are willing to serve as CPCU Champions. Ask them for a short summary of how the chapter and the Society can best support the new Champion's efforts. Submit the names and summaries to Malvern.

1A8 [] Conduct any additional program or initiative (not used elsewhere) in support of the Connections/Champions program. Fully describe.

B. Candidate Development

Chapter Circle of Excellence Criteria:

1B1 [] Conduct an activity to attract *new* candidates to begin CPCU or one of the IIA programs. (note: this is not for existing candidates or new designees).

1B2 [] Conduct a program designed to *retain existing* candidates and reduce barriers to completion of the CPCU designation program. This program should include activities to match sponsors with CPCU candidates, and/or activities to provide support to existing candidates and to encourage them to continue their studies.

1B3 [] Conduct or sponsor formal CPCU/IIA study classes. Describe the program.

1B4 [] Conduct a marketing program to promote *Candidate Membership* in the Society to your candidates with 4 or more parts completed. Describe.

1B5 [] Work with your AICPCU Sales Executives on a joint presentation or booth at a local company/agency office or industry convention.

1B6 [] Conduct any additional program or initiative (not used elsewhere) in support of developing CPCU candidates. Describe.

C. Grass Roots (“Spread the Word”) Campaign

Chapter Circle of Excellence Criteria:

1C1 [] Establish a grass-roots “Spread the Word” Committee. Name committee members.

1C2 [] Encourage “Spread the Word” activities by your members. Describe how promoted.

1C3 [] Track the “Spread the Word” activities of your members. Recognize these members. Use chapter meetings, chapter Web site, Chaptergram, President’s Message, etc. to communicate progress of the campaign to members.

1C4 [] Submit a ‘Spread The Word’ idea to *CPCU News*.

1C5 [] Conduct a good works project and *publicize it* in your local press. Consider partnering with an employer. Describe the project and how promoted.

1C6 [] 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).

1C7 [] Promote chapter educational events (use e-mail, mail, chapter Web site, ads or press releases). Target audiences are members, nonmembers, employers and/or public. Identify event promoted and media used.

1C8 [] Speakers Bureau: 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. Provide names of speaker, topic, date and group presented to.

1C9 [] 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. Provide name of recipient and how publicized.

1C10 [] Hold a joint educational activity with another insurance group in your community. Provide name of group, date and type of activity.

1C11 [] Hold 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. Provide name of group, type of activity and date.

1C12 [] Conduct a scholarship program for students and *promote* in chapter publications and the local press. Describe how it was promoted and winner publicized in chapter publications and local press. Note: This activity is distinct from the member scholarship activity in Item 2B5.

1C13 [] Appoint chapter webmaster; keep current information on Web site. Promote Web site to members.

1C14 [] Promote your Web site to others (e.g. local employers, organizations).

1C15 [] Conduct an educational activity that specifically includes local CPCU Champions and their employers. The activity should increase awareness of the value of the CPCU designation and participation in the CPCU Society and its chapters.

D. Ethics

Chapter Circle of Excellence Criteria:

1D1 [] Conduct an Ethics Awareness Month activity. Describe.

1D2 [] Publish an ethics article on your Web site or in your Chaptergram or conduct an ethics exercise during a regular chapter meeting.

1D3 [] Conduct an ethics activity with another insurance industry organization such as RIMS, Insurance Women, Agents' Association. Describe. (cannot duplicate 1C10 or 1D1)

1D4 [] Participate in an ethics-related program presented to a *non-insurance group* (students, business, civic or professional group, etc.). Describe.

Area of Emphasis #1 Point Scale

	<u>Earn 1 Point by completing:</u>	<u>Earn 2 Points by completing:</u>	<u>Earn 3 Points by completing:</u>
Small Chapters (6-70)	2 Bold Activities	4 Activities, including 3 Bold Activities	5 Activities, including 4 Bold Activities
Medium Chapters (71-200)	3 Bold Activities	6 Activities, including 4 Bold Activities	8 Activities, including 5 Bold Activities
Large Chapters (201-450)	5 Bold Activities	10 Activities, including 6 Bold Activities	12 Activities, including 7 Bold Activities
Jumbo Chapters (451+)	6 Bold Activities	11 Activities, including 7 Bold Activities	14 Activities, including 8 Bold Activities

Area of Emphasis #2

Member Success

A. Keeping Members at the Top of their Profession Technically

Chapter Circle of Excellence Criteria:

2A1 [] Maintain an active program to encourage and assist chapter members to earn CPD certification. (for example: provide CPD “Certificates” for chapter events; provide link to the on-line CPD application on your Web site; recognize qualifiers in chapter publications, periodically remind members to file, etc.)

Note: Chapter’s qualification for the CPD Award for Excellence is determined separately.

2A2 [] Conduct a member survey to gather feedback on members’ *training needs*, ideas for cutting edge topics, etc.

2A3 [] Conduct an educational workshop or seminar (longer than a chapter meeting). Provide date, speaker and topic.

2A4 [] Conduct an I-Day to provide multiple educational topics for an insurance industry audience. Provide date, topics and overall attendance.

2A5 [] Partner with the CPCU Society to co-sponsor a technical workshop in your local area. Provide topic and date.

2A6 [] Conduct any additional technical insurance program (this can be a chapter meeting). Suggestion: consult with your governor to develop the program. Provide date, speaker and topic.

2A7 [] Chapter Web site: publish technical, leadership, and/or career planning educational information on your chapter Web site and promote to members, employers and/or other insurance professionals. Provide links to outside resources, where appropriate. Describe.

2A8 [] Promote attendance at the CPCU Annual Meeting and Seminars. Describe how promoted to the general membership (just sending an officer does not qualify.)

2A9 [] Conduct a Chapter Research Study. Communicate the results to members and outside audiences.

2A10 [] Submit an article to the e-Journal.

2A11 [] Submit an article to an Interest Group newsletter.

2A12 [] Work with Interest Group members to conduct an educational program. Details on topic and interest group(s) involved.

B. Leadership and Professional Skills Development

Chapter Circle of Excellence Criteria:

2B1 [] Develop your chapter's leaders. This may be part of the nominating committee responsibilities to ensure a pipeline of future leaders for the chapter. It includes appointment of committee/task force chairs, recruiting new members for chapter activities or tasks, leadership skill training and recognition for chapter leaders. Describe your leadership development program. Note: this must be in addition to item 3A1.

2B2 [] Promote attendance by chapter general membership (not just send one or two persons) at the CPCU Society Leadership courses offered prior to the Annual Meeting and at the Leadership Summit. Describe how promoted.

2B3 [] Partner with the CPCU Society to sponsor or promote CPCU Society Center for Leadership courses in your local area or at a local company. Provide topic and date.

2B4 [] Conduct any additional educational program focusing on leadership skills. (This can be a chapter meeting speaker). Suggestion: consult with your governor to develop the program. Provide date, speaker, and topic.

2B5 [] Fund a scholarship or loan program that benefits *chapter members* or *candidates*. (Providing another chapter with financial assistance to send a representative to the Chapter Leader Conference qualifies under this item.)

C. Resources for Career Management

Chapter Circle of Excellence Criteria:

2C1 [] Conduct a career development program at a chapter meeting or other chapter event. This must be a program not just a social or networking activity (e.g., speaker on resume writing, interviewing, or Center for Leadership-type topic). Provide date, speaker and topic.

2C2 [] Assist new members in getting to know other chapter members. Help new designees and transferring members develop an understanding of chapter operations and activities and maximize networking opportunities.

2C3 [] Promote the CPCU Society Job Network and educate your members about the career management resources available to them from the CPCU Society.

2C4 [] Provide networking opportunities or other types of assistance to out-of-work members. Describe.

2C5 [] Conduct any additional program or provide any resource (not used elsewhere) in support of your members' career development.

Area of Emphasis #2 Point Scale

	<u>Earn 1 Point by completing:</u>	<u>Earn 2 Points by completing:</u>	<u>Earn 3 Points by completing:</u>
Small Chapters (6-70)	2 Bold Activities	6 Activities, including 4 Bold Activities	7 Activities, including 5 Bold Activities
Medium Chapters (71-200)	4 Bold Activities	8 Activities, including 6 Bold Activities	9 Activities, including 7 Bold Activities
Large Chapters (201-450)	6 Bold Activities	9 Activities, including 8 Bold Activities	10 Activities, including 9 Bold Activities
Jumbo Chapters (451+)	7 Bold Activities	10 Activities, including 8 Bold Activities	11 Activities, including 9 Bold Activities

Area of Emphasis #3:

Membership & Stewardship

A. Chapter Planning

Chapter Circle of Excellence Criteria:

3A1 [] Send the chapter president-elect and/or other chapter leader(s) to the Leadership Summit for the chapter Leader Conference.

3A2 [] Send chapter webmaster or other chapter leader(s) to Malvern for chapter webmaster training.

3A3 [] 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 Governor to this meeting.

3A4 [] Submit names of chapter officers and committee chairs to the Society by June 1. (Note: additional chairs can be added during the year as appointed).

3A5 [] Complete the Circle of Excellence Planning Checklist (or a more detailed planning document); share/discuss with the membership. Describe how the plan was shared.

3A6 [] Send your planning document to your Governor and to Malvern at the beginning of the chapter year (suggested by Sept. 30).

3A7 [] Conduct overall membership survey to assess *member satisfaction* and *recruit volunteers* for chapter leadership positions. Publish results to members. Design action plans to address findings reported in the survey. Note: This activity is distinct from the training needs survey described in 2A2.

3A8 [] Conduct any additional program or initiative (not used elsewhere) in support of chapter planning.

B. Member Recognition

Chapter Circle of Excellence Criteria:

3B1 [] Recognize your chapter's volunteer leaders and CPCU Champions (i.e., awards, notice in Chaptergram, Society Shop gifts, letter to employer, etc.)

3B2 [] Conduct a local Conferment ceremony for your new designees.

3B3 [] Conduct any additional program or initiative (not used elsewhere) in support of member recognition.

C. Member Networking

Chapter Circle of Excellence Criteria:

3C1 [] Maintain an up-to-date membership database of all chapter members. Regularly obtain updated membership data from the CPCU Society Web site. Remind members to update their records.

3C2 [] Invite all chapter members to an event that is *social* in nature and is not a regular chapter meeting.

3C3 [] Conduct a joint networking meeting with another insurance organization, such as RIMS, Insurance Women, Agents' Association, etc.

3C4 [] Conduct any additional member networking program or initiative (not used elsewhere).

D. Chapter Administration

Chapter Circle of Excellence Criteria:

3D1 [] Conduct an activity, other than mailing a routine meeting notice, to improve attendance at meetings or events.

3D2 [] Conduct an activity or program designed to locate and renew "lapsed" members.

3D3 [] Conduct an activity (other than Conferment) designed to welcome, recognize, and involve *new designees*.

3D4 [] Conduct an activity to increase the participation of *retired* members.

3D5 [] Conduct an activity designed to locate *new* CPCU Champions. Fully describe.

3D6 [] Encourage members to volunteer for chapter service. Motivate experienced chapter leaders to apply for CPCU Society service (Governor, Committee, Task Force, etc.) Explain what was done to encourage members to volunteer for service.

E. General Support of Education

Chapter Circle of Excellence Criteria:

3E1 [] Establish or maintain chapter Loman membership: \$1 per paid member for Chapter CPCU Club or \$5 per paid member for Chapter Loman Club. Promote *individual members' support* of the CPCU-Loman Education Foundation.

3E2 [] Fund or support a library program (examples: purchase of insurance publication subscription(s) for a local library; develop a library of CPCU textbooks donated by members for the use of CPCU candidates, etc.)

3E3 [] Conduct an educational program or activity (other than a scholarship) with local college students (e.g. Gamma Iota Sigma chapters) or local high school (e.g. Driving Safety, Career Day, Project InVest, etc.).

3E4 [] Provide financial sponsorship for an event, speaker or educational program at the Society's Leadership Summit or Annual Meeting.

Area of Emphasis #3 Point Scale

	<u>Earn 1 Point by completing:</u>	<u>Earn 2 Points by completing:</u>	<u>Earn 3 Points by completing:</u>
Small Chapters (6-70)	3 Bold Activities	6 Activities, including 4 Bold Activities	7 Activities, including 5 Bold Activities
Medium Chapters (71-200)	4 Bold Activities	7 Activities, including 5 Bold Activities	9 Activities, including 6 Bold Activities
Large Chapters (201-450)	5 Bold Activities	12 Activities, including 7 Bold Activities	16 Activities, including 8 Bold Activities
Jumbo Chapters	6 Bold Activities	14 Activities, including	18 Activities, including

