



# Iowa Chapter

## Officer, Directors, and Committee Chairs Job Descriptions and Responsibilities

Version 2.1 August 2010

## **IOWA CPCU CHAPTER JOB DESCRIPTIONS (updated August 2010)**

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.

- Attends Leadership Summit for chapter training if possible.
- Informs Society office of new officers/chairpersons and keeps list current.
- Directs chapter board meetings and gives general direction to officers, directors, and committee/task force chairpersons / encourages board members to recruit new leaders.
- Writes president’s column for monthly Chaptergram.
- 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.
- Attends the CPCU Society Annual Meeting and networks with other chapter presidents.

### **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 long-range plans, including establishing objectives for his or her term as president, and serves as a liaison to other insurance organizations.

- Attends Leadership Summit for chapter training if possible.
- Directs program task force to plan meetings for the fiscal year, requesting registration table and chairs when making meeting reservations.
- 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 to speakers following events.
- Sends congratulatory letters to new designees in connection with I-Day.
- Encourages others to get involved with chapter & encourages new ideas for recruiting.
- Serves as substitute for chapter president when necessary, including board meetings.

## **Secretary**

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

- Attends Leadership Summit for chapter training if possible.
- Distributes board meeting minutes to board members.
- Oversees the production of the Chaptergram and assists editor as necessary.
- Writes monthly email (with subject line “CPCU Meeting...”) which accompanies meeting announcement/Chaptergram and sends to administrator for distribution.
- Verifies that Chaptergram & meeting links are updated prior to sending meeting announcement to administrator; communicates with web master if necessary.
- Acts as liaison to membership chairperson if necessary.
- Maintains copies of contracts, chapter by-laws and certificate of insurance.
- Manages inventory of supplies.

## **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 our administrator.

- Attends Leadership Summit for chapter training if possible.
- Meets with outgoing treasurer and administrator to review financial records.
- Updates signature cards at bank; serves as primary contact for bank or auditors.
- Works with administrator to prepare for monthly meetings; responsible for picking up registration list, name badges, and petty cash (if necessary) at administrator’s office and returning list, badges, and payments received.
- Forwards registration list to Member Interaction committee chair prior to monthly meetings.
- 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.
- 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).
- Develops budget with board of directors at end of year for following year.

## **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, Community Involvement, & Professional Development**

### ***INTERNAL OPERATIONS***

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

The Director of Internal Operations monitors activities related to the efficient operation of the Iowa Chapter of CPCU. These include: our annual submission to the CPCU Society for the Circle of Excellence award; the publication of the monthly Chaptergram; 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.

- Maintains a spreadsheet showing 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 Society of CPCU prior to May 31<sup>st</sup>.

#### **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.

#### **Industry Visibility**

Develops and facilitates programs to enhance the visibility of the Iowa Chapter of CPCU 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 Community Involvement 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 Chapter of CPCU.

- 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.

## **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.

## **COMMUNITY INVOLVEMENT**

### ***Director of Community Involvement***

The Director of Community Involvement oversees activities of the chapter which involve the marketing of the CPCU designation and the Iowa Chapter to various outside stakeholders. Committees included are: Public Relations; Website Development; Good Works; Photographer; Scholarships; and our liaison to the Iowa Insurance Hall of Fame.

#### **Public Relations**

Implements strategies to promote the Iowa Chapter of CPCU, 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.

#### **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.

#### **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.

## **Scholarship**

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

- 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).
- Works with treasurer to submit proper documentation to the Society for matching funds.

## **Iowa Insurance Hall of Fame**

Serves as the liaison from the Iowa Chapter of CPCU 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 CPCU board.
- Attends the annual induction ceremony and banquet.
- Assists webmaster as needed with enhancements to the Hall of Fame website.

## ***PROFESSIONAL DEVELOPMENT***

### ***Director, 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.

### **Education, Leadership, and Career Management**

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

- Organizes technical workshops through the CPCU Society.
- Organizes leadership seminars offered through the CPCU Society.
- Assists the program chair (the Vice President) in developing and delivering one lunch program during the year relating to a career management topic.
- 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 and also post on an annual basis at least one ethics related article in the Iowa Chapter's Chaptergram.