



Chapter and Interest Group Volunteer Leader Position Descriptions Volunteer Leader Role Study Results

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How to Use as a Volunteer Recruitment and Development Tool

It is important to note that the roles and descriptions presented are designed to be widely applicable. Chapters and interest groups may add or combine roles based on their own needs

Using as a Recruitment Tool

When using as a recruitment tool, consider:

Recruiting with skills in mind

- Teams succeed when individuals are charged with tasks based on their strengths and talents as opposed to willingness alone.
- Just as in a paid employment role, volunteers who lead a team should be knowledgeable of the task at hand.
(For example, a strong webmaster knows how to edit a website, and a strong president knows how to lead a team.)

Being transparent about the expectations

- Volunteers should know the time commitment before they commit to a leadership role in order to prevent burnout.
- Volunteers should be made aware of the skills needed for success so they are better equipped to select a role that best fits their experience.
- Being upfront shows a high level of professionalism and respect for volunteers’ time.

Attracting a new and diverse volunteer pool

- Healthy associations don’t rely on the same core group year after year.
- New volunteers bring new perspective, skills and ideas.
- Prospective leaders need to be shown that there is a place for them to get involved. It should be easy for them to find a role appropriate for their level of experience.
- Take the first step! Members often don’t volunteer because they have never been asked.

Using as a Leadership Development Tool

Chapter and interest group leaders are encouraged to critically evaluate their own skills and compare them to the skills defined in their role’s description, and to share desired professional development topics with their chapter, interest group and the CPCU Society. Being aware of volunteers’ professional development needs allows the CPCU Society to offer more valuable educational opportunities through the Leadership Summit and webinars.

Recommendations for Prospective Volunteers

It is important to note that the experiences of volunteer participants in each role may differ greatly. Candidates should confirm expectations with the chapter or interest group prior to accepting the role to ensure that the role best fits their experience and availability.

Each role description in this report includes graphs representing the range of responses for each role’s frequency of commitments, average volunteer hours per month and average years of industry experience. Even though the data gathered and presented in this report may suggest a specific time commitment or level of experience for a certain role, the unique activities in each chapter and interest group may require additional or less time and experience.

Role Recommendations by Experience Level

The following roles are recommended for first-time volunteers:

- Chapter Secretary, page 16
- Chapter Director/Board Member/Member-at-Large, page 22
- Chapter Webmaster/Social Media Chair, page 24
- Chapter Communications Chair, page 34
- Interest Group Committee Member, page 42
- Interest Group Webmaster/Social Media Chair, page 44

The following roles are recommended for volunteers with 1–3 years of leadership experience:

- All of the roles listed above
- Chapter Vice President, page 14
- Chapter Treasurer, page 18
- Chapter Membership Chair, page 26
- Chapter Education Chair, page 30
- Chapter Events and Programs Chair, page 32
- Interest Group Vice Chair, page 40

The following roles are recommended for volunteers with 4+ years of leadership experience:

- All of the roles listed above
- Chapter President, page 10
- Chapter President-Elect, page 12
- Chapter Immediate Past President, page 20
- Chapter New Designee, Candidate and Student Development Chair, page 28
- Interest Group Chair, page 38

Role Recommendations by Time Commitment

Average Hours Spent Per Month

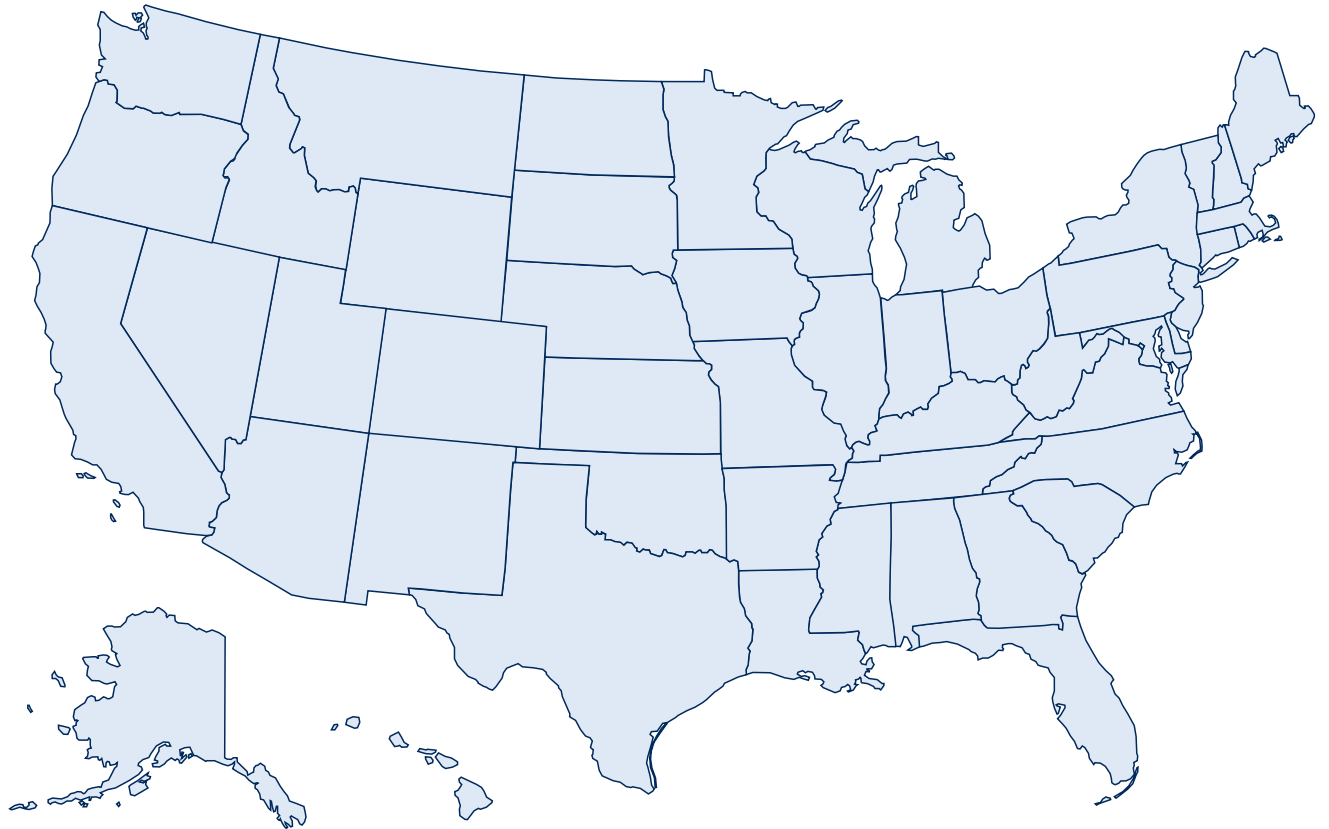
Roles are ranked from lowest to highest expected time commitment based on gathered data. Blue indicates a higher number of responses.

Role	1–5 hours	6–10 hours	11–20 hours	21+ hours
Interest Group Committee Member				
Interest Group Vice Chair				
Chapter Secretary				
Interest Group Webmaster/Social Media Chair				
Chapter Education Chair				
Chapter Webmaster/Social Media Chair				
Chapter Director/Board Member/Member-at-Large				
Chapter Treasurer				
Chapter Membership Chair				
Chapter Events and Programs Chair				
Interest Group Chair				
Chapter President-Elect				
Chapter Vice President				
Chapter Past President				
Chapter Communications Chair				
Chapter President				
Chapter New Designee, Candidate and Student Development Chair				

CPCU Society Chapters

Make the most of your CPCU Society membership by participating in your local chapter. You'll be able to network with other local insurance professionals, participate in regional programs and projects, attend local educational seminars and conferences, and take advantage of career-building leadership opportunities. Plus, there are opportunities to participate in chapter community-service programs—a great way to connect with your neighbors and let them know about the CPCU® designation.

The CPCU Society has more than 124 chapters in the United States, Bermuda, Europe, Japan and Korea. With so many options, you can choose to stay with your local chapter or join the chapter located in the region in which you do the most business.



Volunteer Chapter Role Description

President

Role Description

Volunteer responsible for overall oversight of the chapter and the board. The president directs the activities of the other board members to set and meet strategic goals and maintain operational integrity in accordance with the chapter bylaws.

Roles and Responsibilities

In order of importance

- Direct the chapter’s strategic goals.
- Strive to achieve the chapter’s vision, mission and objectives as detailed by the chapter board and CPCU Society strategic plan.
- Direct the activities of other officers toward chapter goals and objectives.
- Ensure that the chapter board works toward goals and objectives.
- Attend and preside over board of directors meetings and the chapter membership meetings.
- Assume ultimate accountability for all board operations and chapter activities.
- Ensure strategic alignment, planning and annual reporting.
- Assume responsibility for the overall functioning of the chapter.
- Represent the chapter at public events.
- Ensure that all chapter business is conducted legally and ethically.
- Act as a liaison between the chapter and the Society.
- With the board, ensure prudent disbursement of chapter funds.
- Develop and implement a succession and transition plan.
- Ensure that the chapter is meeting the goals set forth in the Circle of Excellence program.
- Promote leadership development opportunities and board development.
- Network and foster relationships with potential members and collaborators.
- Legally represent the chapter (this role can be performed in cooperation with the finance officer).

- Identify and build a strong pool of future leaders.
- Drive implementation of revisions and amendments to Society policies and guidelines regarding chapter processes.
- Manage periodic policy audits.
- Ensure chapter/corporate compliance.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

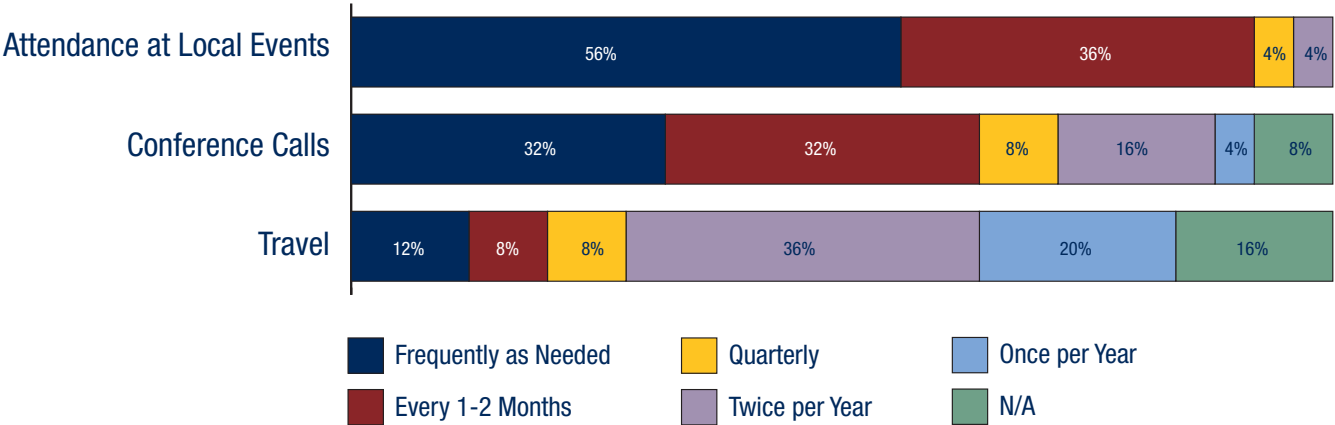
- Organization management
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Project management

Leadership Skills

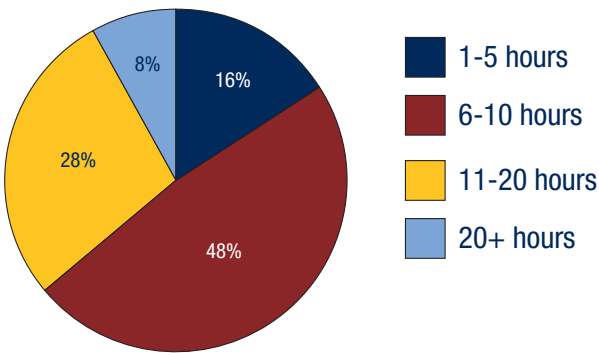
In order of importance

- Ability to delegate effectively
- Strategic thinking
- Networking/relationship building
- Public speaking/presentation
- Team building
- Conflict resolution

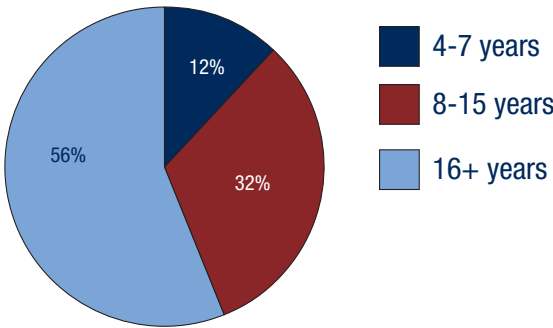
Frequency of Commitments



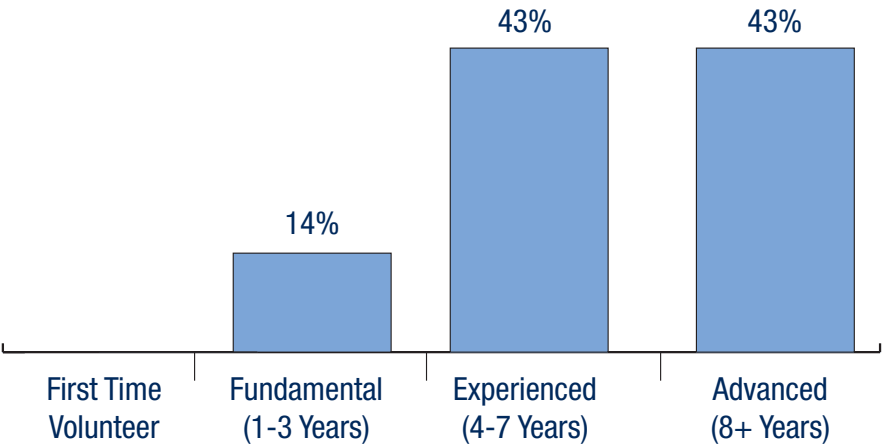
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

President-Elect

Role Description

Elected volunteer who will serve as successor to the president and will assist the president with his or her duties of managing the chapter and will assume the role of the chapter president if the president is unable to perform his or her duties for any reason.

Roles and Responsibilities

In order of importance

- Represent the president in his or her absence.
- Assume the role of the president the year following successful completion of his or her duties in this role (depending on the chapter bylaws).
- Attend all board of directors meetings.
- Assist the president in his or her duties.
- Shadow the president to learn his or her duties, working relationships and progress on initiatives.
- Attend chapter membership meetings and events as needed.
- Develop and implement a succession and transition plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- Oversee chapter volunteers and projects as needed.

Role-Specific Skills

In order of importance

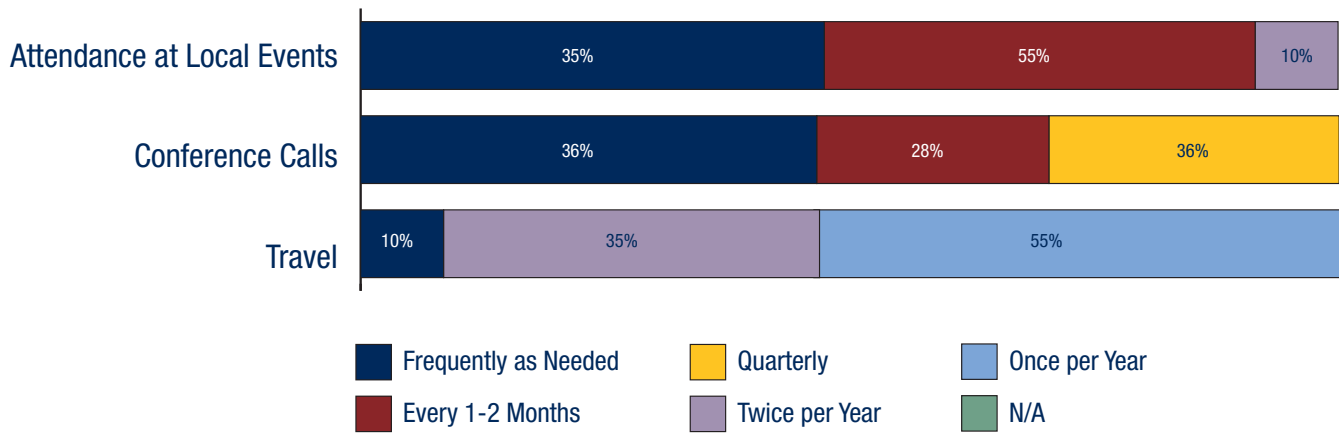
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Project management
- Financial and budget planning
- Parliamentary procedures (for example, Robert’s Rules of Order)

Leadership Skills

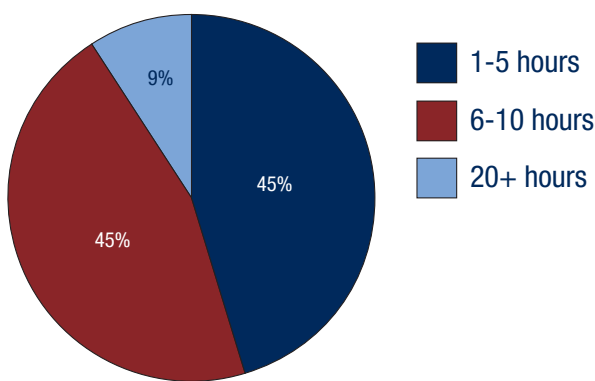
In order of importance

- Active listening
- Strategic thinking
- Ability to delegate effectively
- Team building
- Public speaking/presentation
- Networking/relationship building
- Conflict resolution

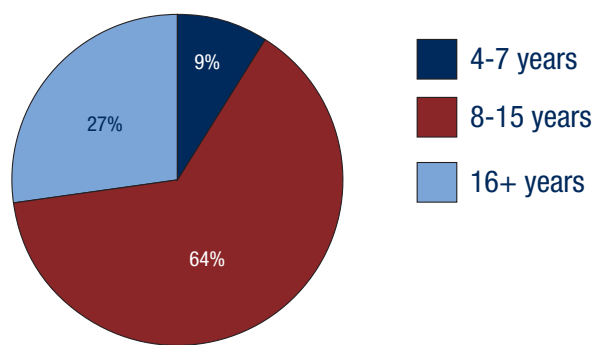
Frequency of Commitments



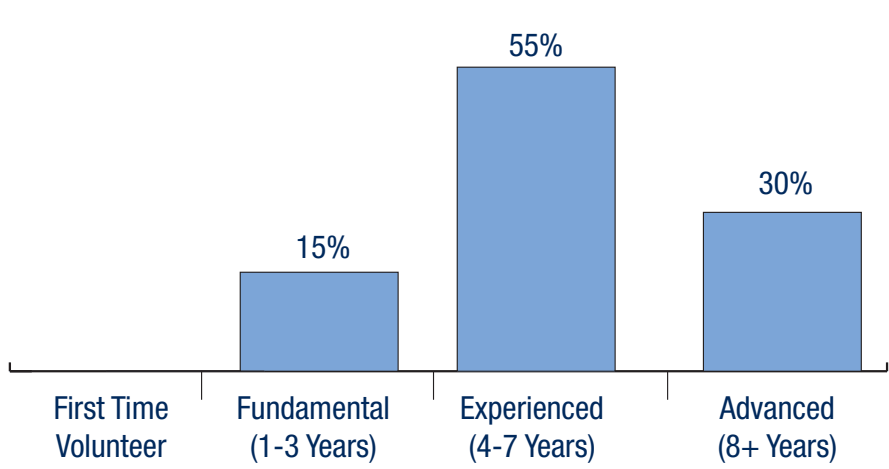
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Vice President

Role Description

Elected volunteer who will assist the president with his or her duties of managing the chapter.

Roles and Responsibilities

In order of importance

- Attend all board of directors meetings.
- Assist the president in his or her duties.
- Represent the president in his or her absence and in the absence of the president-elect.
- Attend chapter membership meetings and events as needed.
- Develop and implement a succession and transition plan.
- Oversee chapter volunteers and projects as needed.
- Direct the Circle of Excellence submissions.
- Oversee the operations committee, if applicable.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

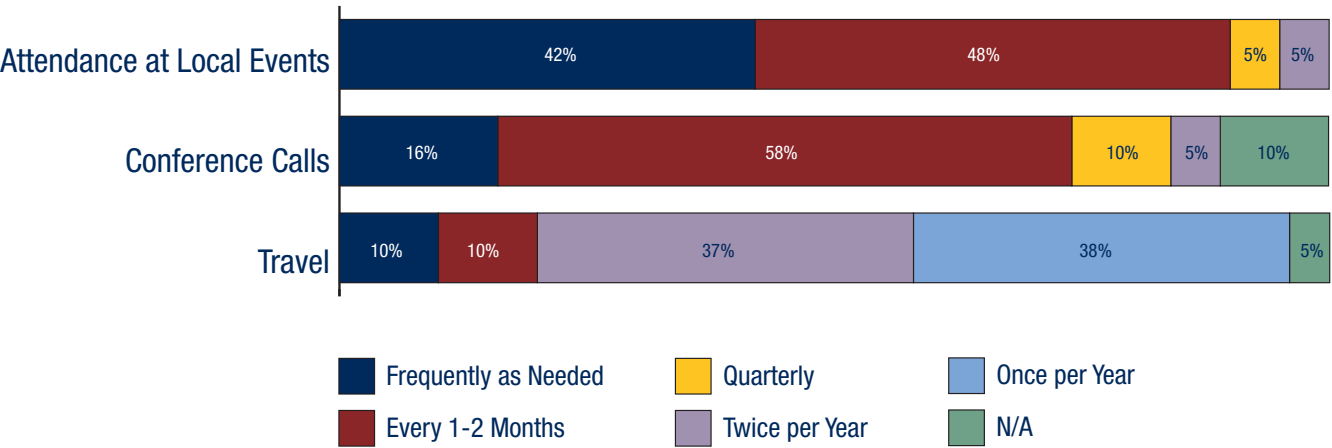
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Resource management
- Project management
- Financial and budget planning
- Parliamentary procedures (for example, Robert’s Rules of Order)

Leadership Skills

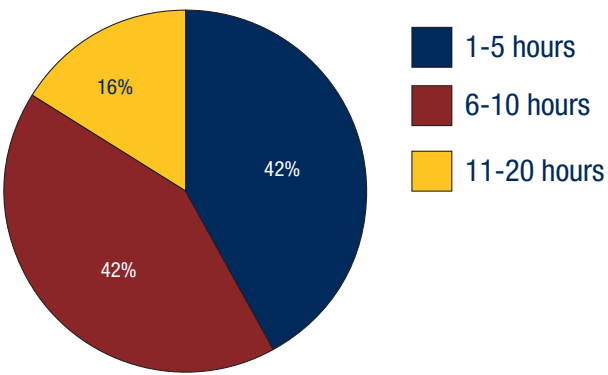
In order of importance

- Ability to delegate effectively
- Networking/relationship building
- Strategic thinking
- Active listening
- Team building
- Public speaking/presentation
- Conflict resolution

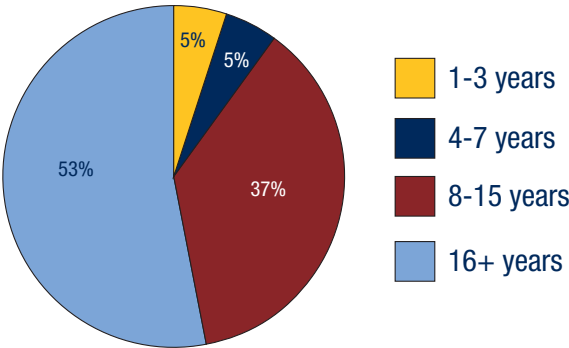
Frequency of Commitments



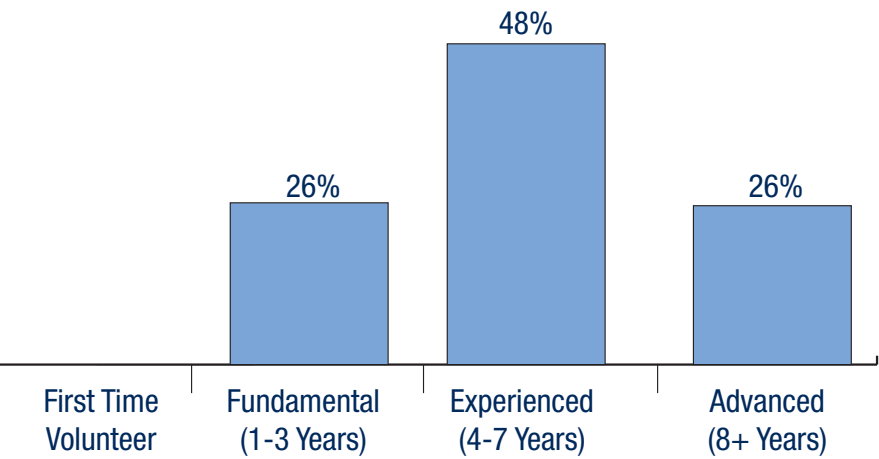
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Secretary

Role Description

Elected volunteer responsible for preparing, maintaining, recording and circulating all records, correspondence, notice of meetings, minutes of meetings and related affairs of the chapter.

Roles and Responsibilities

In order of importance

- Record, edit, maintain and distribute meeting minutes.
- Coordinate and distribute board meeting agendas to board members.
- Attend all board of directors meetings.
- Maintain custody of the approved bylaws, articles of incorporation, charter agreement and amendments thereto, board policies, committee charters and all other nonfinancial records for chapters.
- Notify membership within the period stated in the chapter bylaws before each chapter membership meeting.
- Provide announcements and notifications to membership, directors, auditors and members of committees.
- Receive and dispatch general correspondence.
- Provide records to members and outside organizations that request information.
- Attend chapter membership meetings and events as needed.
- Provide support for membership communication.
- Prepare for, procure and distribute chapter stationery and other printed materials.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- Develop and implement a succession and transition plan.

Role-Specific Skills

In order of importance

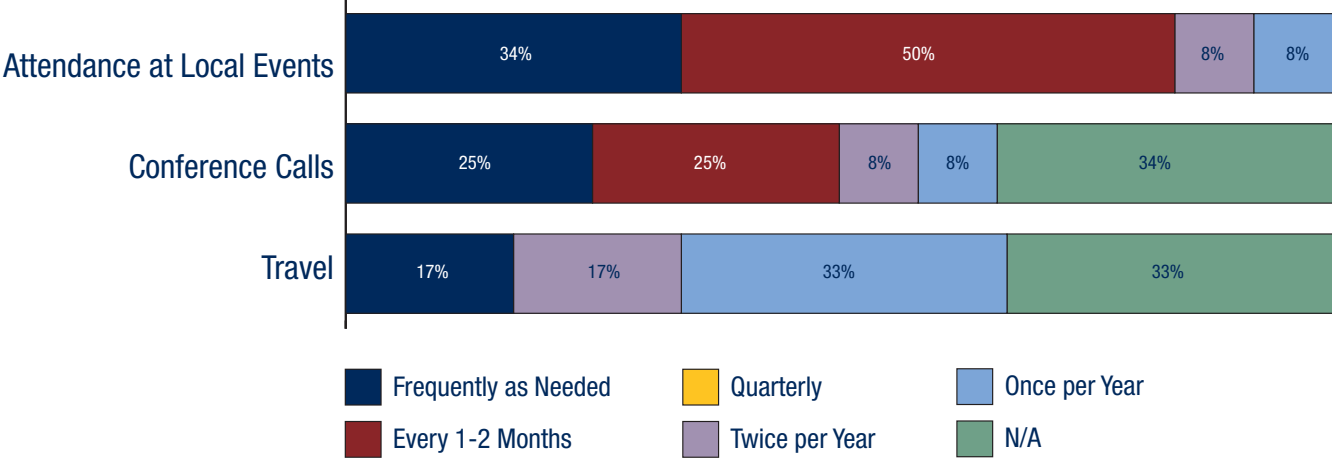
- Ability to scribe and record minutes
- Agenda and meeting coordination
- Exceptional composition and grammar
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Proficient in email communications
- Knowledge of records retention requirements
- Proficient in copywriting, editing and proofreading
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Parliamentary procedures (for example, Robert’s Rules of Order)

Leadership Skills

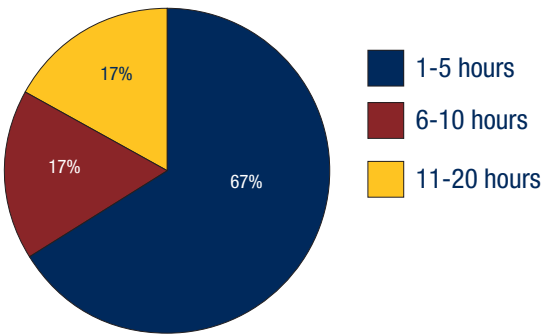
In order of importance

- Active listening
- Excellent communication
- Facilitation
- Time management
- Organization

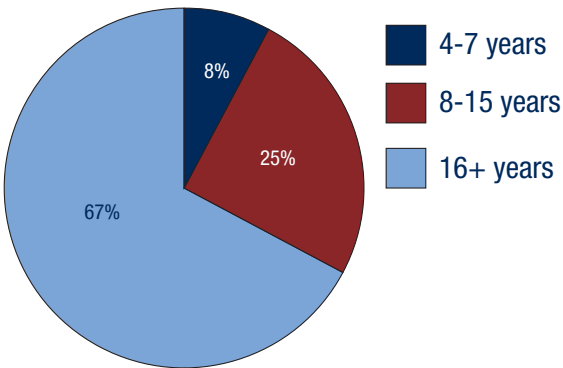
Frequency of Commitments



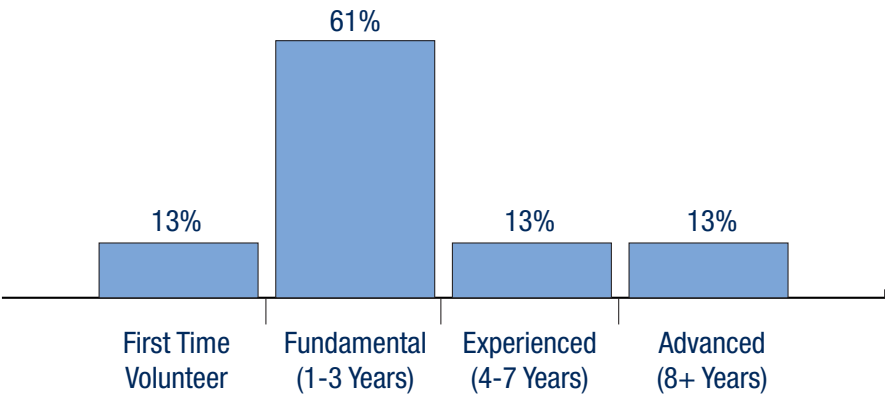
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Treasurer

Role Description

Volunteer responsible for the planning, review and approval of revenue and expenses, and for maintaining and presenting all financial records required for chapter operations in accordance with the bylaws.

Roles and Responsibilities

In order of importance

- Maintain and manage accounts receivable and payable and all financial portfolios, including but not limited to the collection of chapter dues from the Society, guest payments for chapter meetings or special events and the payment of all chapter bills in accordance with chapter committee directives.
- Establish and maintain all required chapter bank accounts and/or similar financial transactions; arrange for officer signatures, as required.
- Provide financial reporting regarding chapter-activity finances to the chapter membership, chapter board and executive-level volunteer leaders on a monthly basis (board meeting).
- Develop and maintain annual operating budget.
- Ensure that the chapter has reviewed and reported required tax filings, including IRS Form 990.
- Report on the state of finances at board and chapter meetings.
- Establish and maintain financial operations processes to ensure continuity of chapter operations and to define, document and maintain chapter policies.
- Contribute to the chapter’s financial planning/goal setting, investing, forecasting and budgeting
- Assist in preparing annual financial statements and reports.
- Recommend improvements in financial processes of the board.
- Handle all government-required payments.
- Provide timely information to independent auditors, as required.
- Distribute/communicate financial section of the annual report to chapter membership.
- Ensure maintenance and storage of all historic financial documents.
- Serve as the liaison with the Society on financial matters.

- Attend all board of directors meetings.
- Keep an up-to-date inventory of all the goods of the chapter.
- Establish financial metrics; ensure chapter is maintaining requirements.
- Analyze cost impact and income benefit of all activities proposed by the board.
- Prepare financial guidelines and procedures for the chapter along with board.
- Review chapter contracts, agreements and insurance.
- Develop and implement a succession and transition plan.
- Lead the fund-raising effort and coordinate with other officers/volunteers to meet goals.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

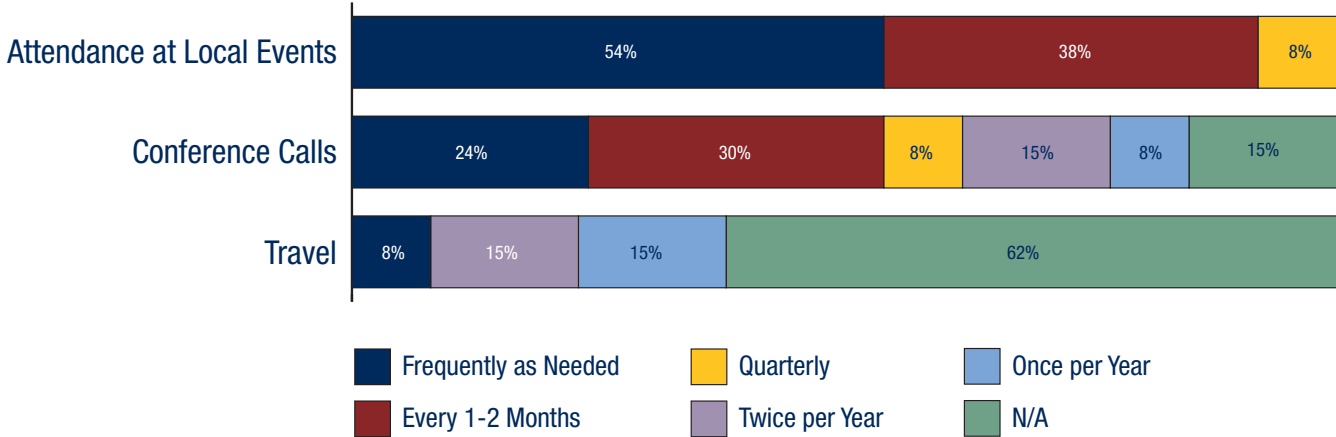
- Financial and budget planning
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Knowledge of records retention requirements
- Accounting software/tools (for example, QuickBooks, Excel)
- Knowledge of generally accepted accounting principles (GAAP)
- Legal awareness

Leadership Skills

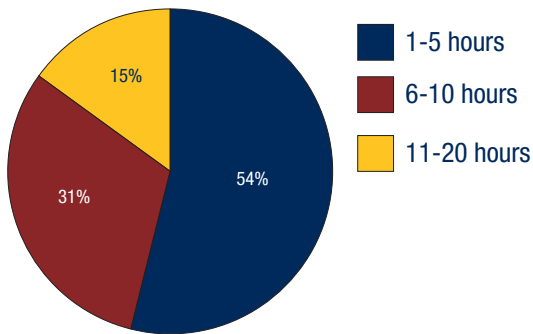
In order of importance

- Adaptability/flexibility
- Time management
- Conflict resolution
- Negotiation

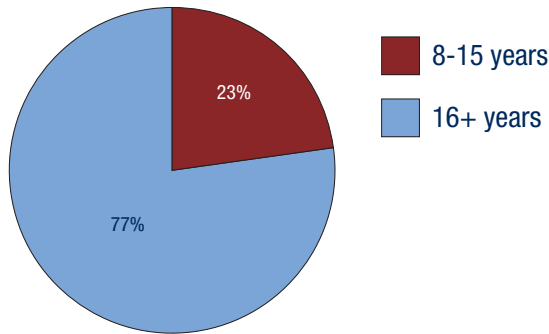
Frequency of Commitments



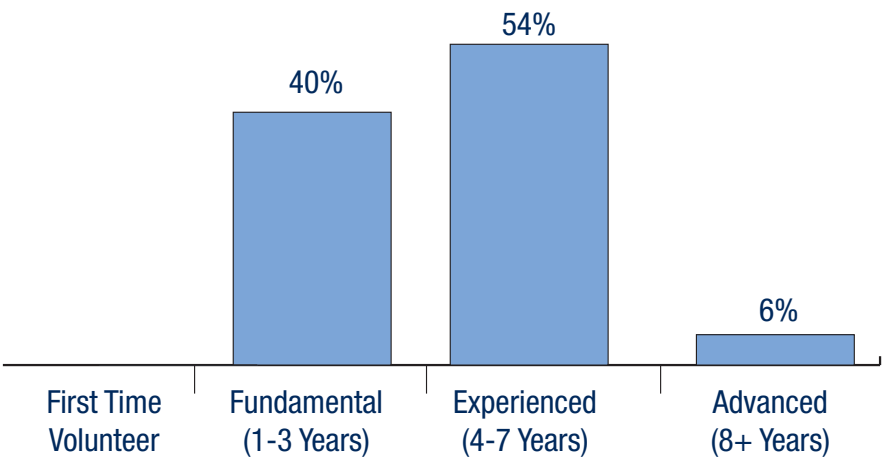
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Immediate Past President

Role Description

Immediate former elected volunteer responsible for strategic oversight of the chapter and board in accordance with chapter policies and bylaws. This volunteer takes an advisory role to mentor the current and incoming president and to ensure continuity in strategic and succession planning.

Roles and Responsibilities

In order of importance

- Maintain continuity in the chapter to help ensure smooth board transitions.
- Assist the board of directors with strategic policies.
- Assume the role of mentor for the president.
- Proactively support and promote work within the board.
- Attend all board of directors meetings.
- Assist the president in liaising with the Society if and when required.
- Serve as chair of the nominating committee.
- Provide ethics enforcement and guidance at the board of directors level.
- Lead and direct the elections process.
- Support conflict resolution.
- Develop and implement a succession and transition plan.
- Engage in outreach with past presidents.

Role-Specific Skills

In order of importance

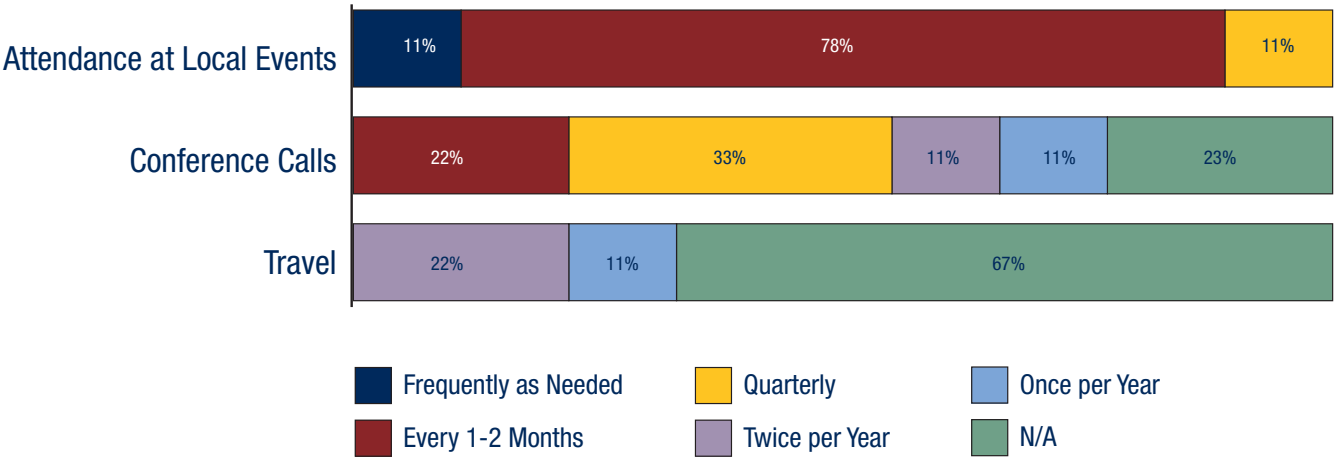
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Strategic planning
- Resource management
- Understanding of volunteer recognition and appreciation programs
- Parliamentary procedures (for example, Robert’s Rules of Order)

Leadership Skills

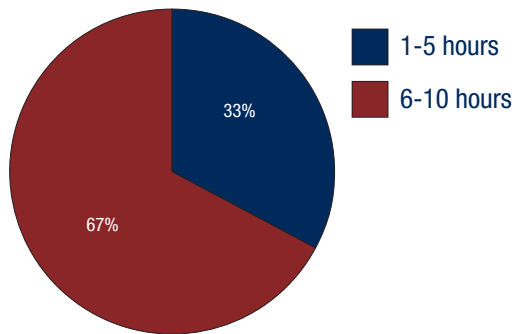
In order of importance

- Facilitation
- Active listening
- Coaching and mentoring
- Strategic thinking
- Networking/relationship building
- Team building
- Conflict resolution

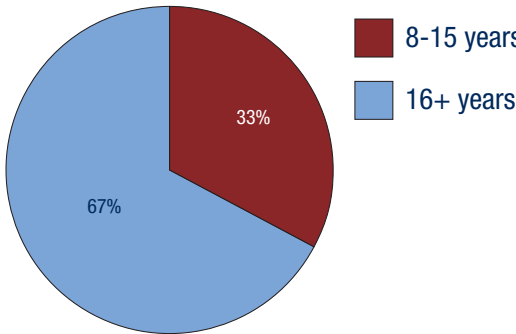
Frequency of Commitments



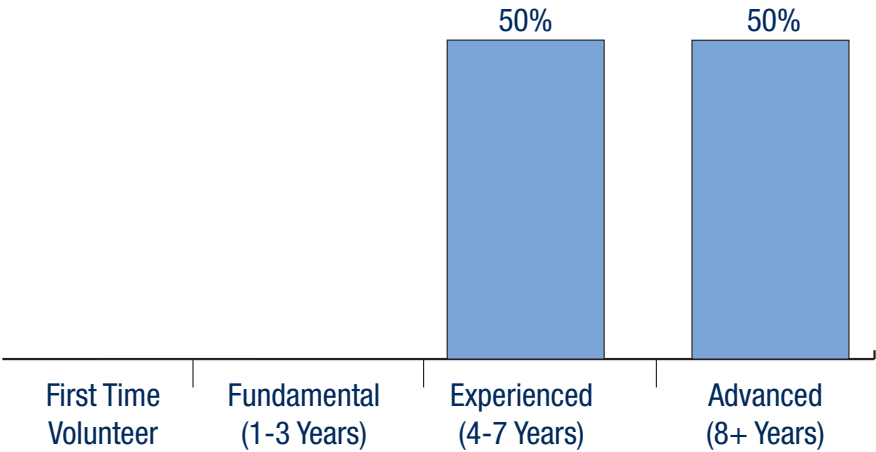
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Director/Board Member/Member-at-Large

Role Description

Volunteer tasked with supporting the president and other officers in setting and meeting strategic goals. He or she may oversee one or more specific projects as delegated by the president and may serve either in a general capacity or more directly (examples: membership chair, education chair and so forth).all financial records required for chapter operations in accordance with the bylaws.

Roles and Responsibilities

In order of importance

- Support the president and other officers in setting and meeting strategic goals.
- Attend all board of directors meetings.
- Attend chapter membership meetings and events as needed.
- Oversee chapter volunteers and projects as delegated.
- Maintain working knowledge of current chapter affairs and initiatives.
- Suggest and critically evaluate initiatives in order to meet strategic goals.
- Provide reports to the president and officers on ongoing projects.
- Develop and implement a succession and transition plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

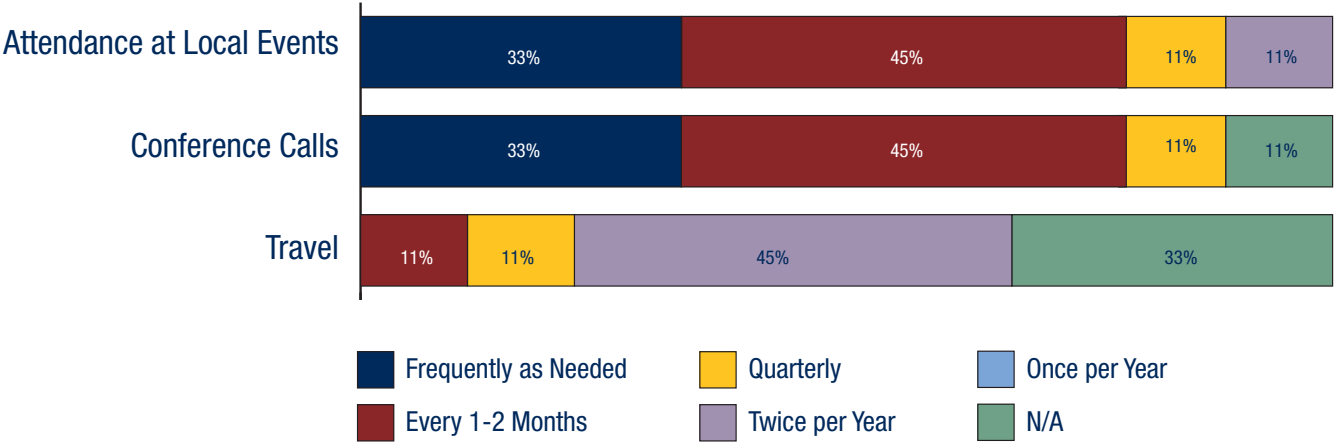
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Project management

Leadership Skills

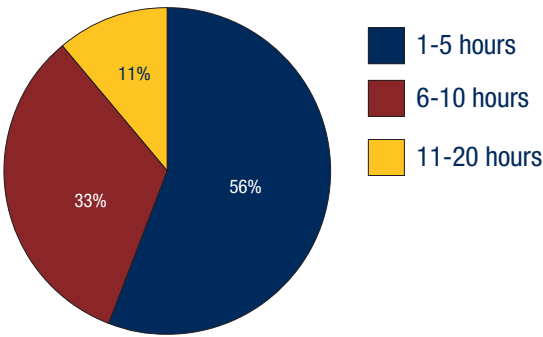
In order of importance

- Active listening
- Adaptability/flexibility
- Strategic thinking
- Excellent communication

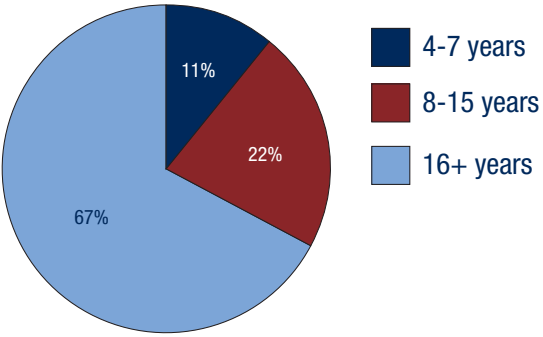
Frequency of Commitments



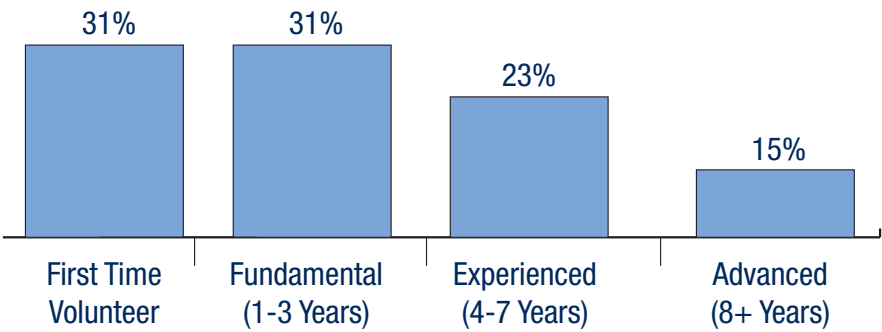
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Webmaster/Social Media Chair

Role Description

Volunteer tasked with maintaining an up-to-date and engaging online presence, both through chapter website and social media. This volunteer works closely with the other officers to ensure that all appropriate events and initiatives are posted through the website and social media.

Roles and Responsibilities

In order of importance

- Post and remove content as needed.
- Continually review website content for necessary updates.
- Maintain a channel of communication with officers and members to gather and post appropriate, accurate and timely content.
- With the communications chair, create social media plan and draft posts for upcoming events.
- Moderate (as needed) chapter social media channels.
- Provide recommendations to communications chair and other officers on optimizing the use of social media and the website to engage members and meet strategic goals.
- Encourage others to comment on posts and share them with others.
- Monitor and aim to increase measurable activity and user interactions for all social media outlets.
- Develop and implement a succession and transition plan.
- Ensure alignment with Society social media, website, branding and best practices.
- Keep abreast of cutting-edge web trends to ensure chapter remains technologically up-to-date.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

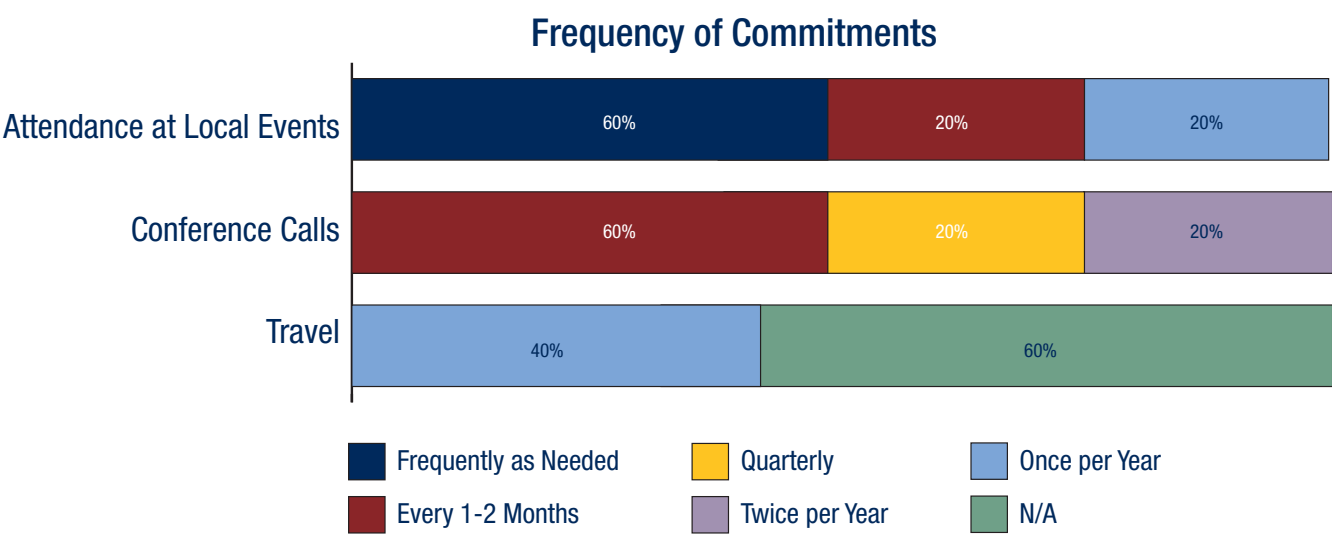
In order of importance

- Basic marketing experience
- Exceptional composition and grammar
- Proficient in copywriting, editing and proofreading
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Project management
- Strong website software experience (for instance, Drupal, WordPress)
- Proficient technical use of social media (for example, Twitter, Facebook, LinkedIn)
- Strong understanding of social media and online media trends and best practices
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

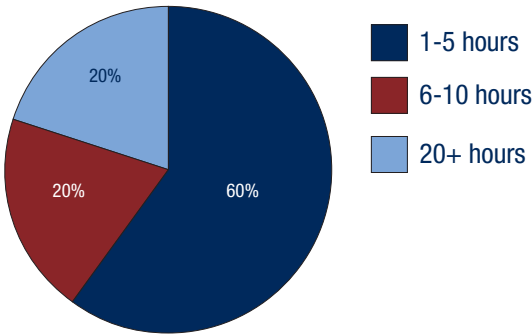
Leadership Skills

In order of importance

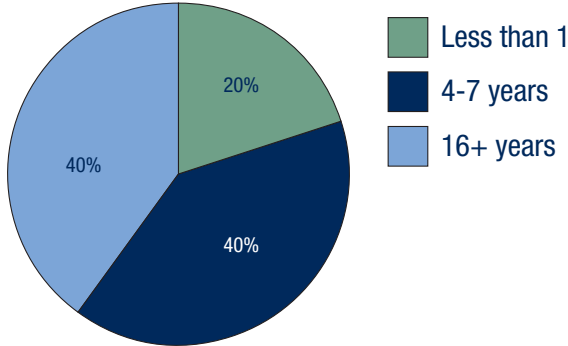
- Excellent communication
- Active listening
- Adaptability/flexibility
- Time management
- Strategic thinking



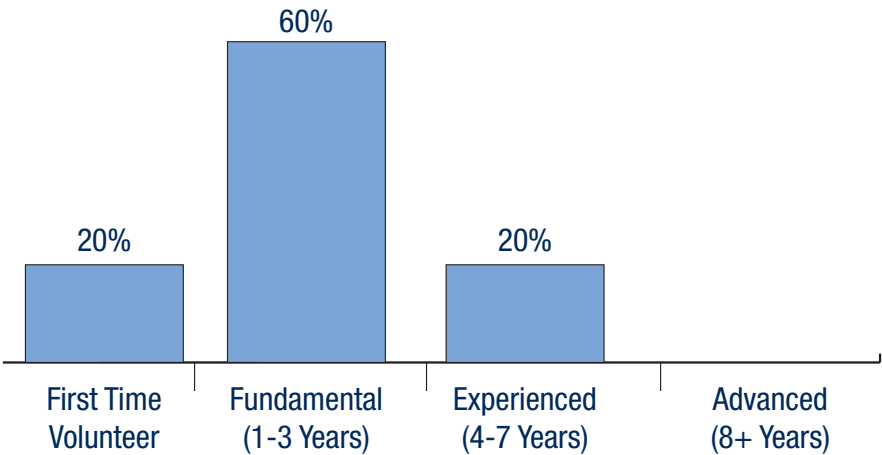
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Membership Chair

Role Description

Volunteer responsible for recruitment, growth and outreach, the membership chair addresses the needs of chapter membership through means such as program development and delivery, to ultimately recruit and retain members in accordance with chapter policies and bylaws.

Roles and Responsibilities

In order of importance

- Maintain the membership records and roster for the chapter.
- Answer general membership inquiries; respond to member/nonmember information inquiries and other requests for assistance.
- Attend chapter board and membership meetings and events as needed.
- Provide communication list/member updates to officers.
- Engage potential members of the Society and the chapter and encourage them to become members.
- Develop and implement a succession and transition plan.
- Ensure that members are aware of available services and benefits.
- Develop and maintain a chapter membership recruitment plan that ensures continued growth through proactive recruiting and partnering with major area employers.
- Promote the value of the Society and chapter membership.
- Acknowledge receipt of dues and renewal of membership.
- Develop and implement a plan to recognize member milestones (such as anniversaries or awards).
- Develop and implement a member retention plan to achieve overall Society goals.
- Review and suggest improvements regarding membership benefits and value on a regular basis.
- Develop and implement membership welcome and engagement plans.

- Coordinate the production and distribution of timely membership reports, such as monthly membership reports by demographics (city, state, age, industry, and so forth).
- React to annual member survey results and make recommendations in conjunction with the board.
- Work with the communications chair or secretary to develop a plan to implement outreach to the community about membership, including commercial, not-for-profit and other professional associations.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

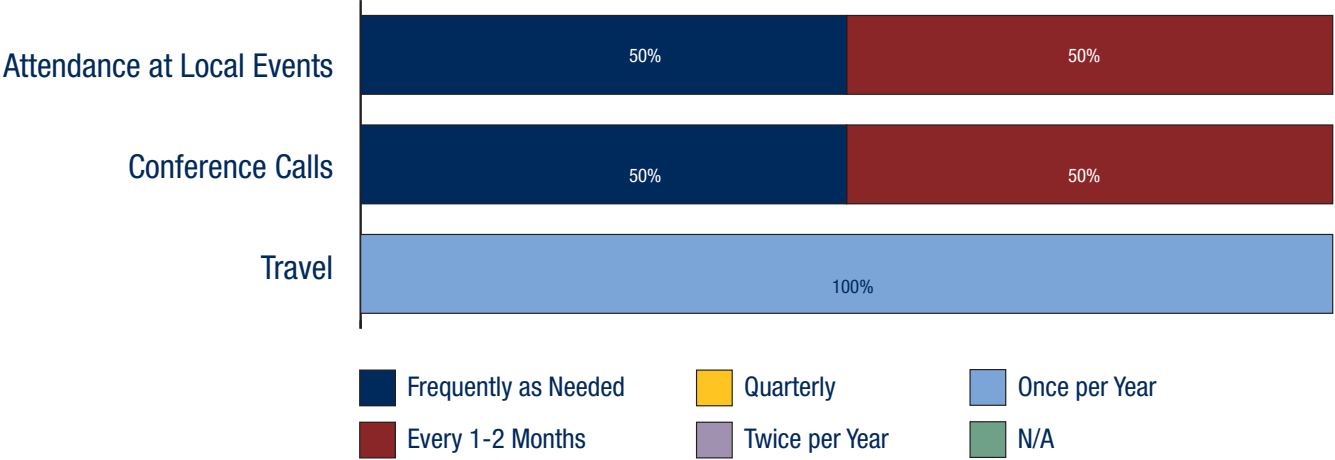
- Knowledge of CPCU Society member types and benefits
- Data analysis and reporting
- Basic marketing experience
- Proficient in email communications
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat, and Outlook
- Project management
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

Leadership Skills

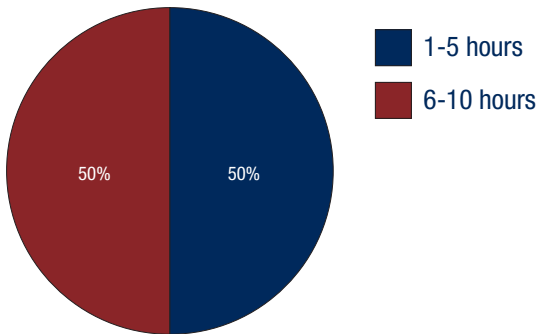
In order of importance

- Ability to motivate
- Team building
- Networking/relationship building
- Excellent communication

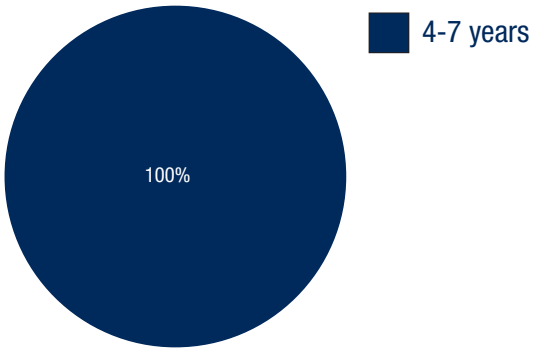
Frequency of Commitments



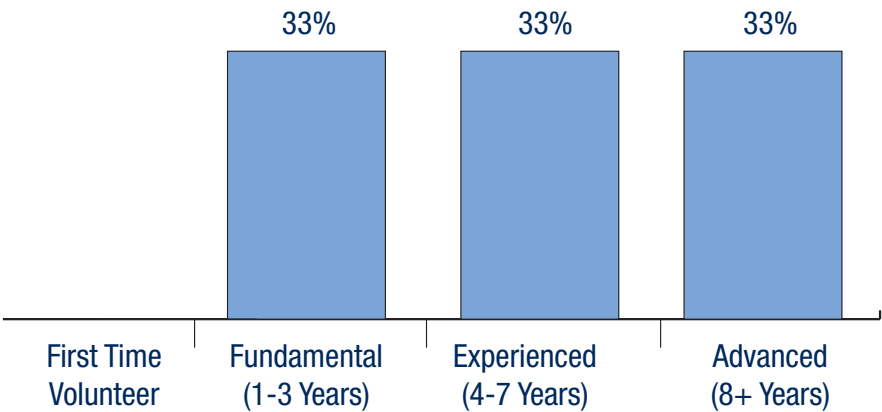
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

New Designee, Candidate and Student Development Chair

Role Description

Volunteer charged with developing and maintaining programs to attract new students and candidates into the insurance profession, as well encouraging them to seek the CPCU designation and to spur new designees to become members of the CPCU Society.

Roles and Responsibilities

In order of importance

- Maintain a current active candidate and prospect list, and coordinate with others to be sure mailing lists are updated annually.
- Understand and stay current regarding the CPCU program and other Institutes programs to attract new candidates and encourage existing ones to continue.
- Maintain accurate records of new designee, candidate and student activity throughout the year.
- Promote the Society’s candidate membership.
- Attend chapter board and membership meetings and events as needed.
- With the events and programs chair, assist with/ coordinate recognition activities, such as local conferments or welcome receptions.
- With the education chair, develop a plan to meet the educational needs of each stage of career development.
- Serve as a contact for questions from new designees, candidates and students.
- Encourage new designees, candidates and students to attend meetings and become active members.
- Oversee and coordinate scholarship opportunities, as appropriate.
- Develop and implement a succession and transition plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

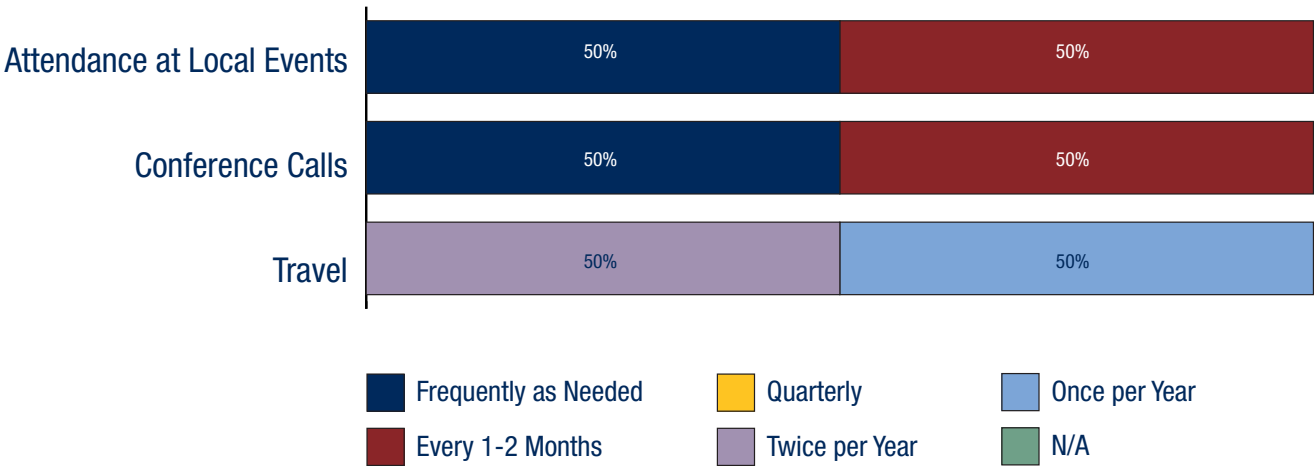
- Project management
- Knowledge of Annual Meeting and other CPCU Society educational offerings
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

Leadership Skills

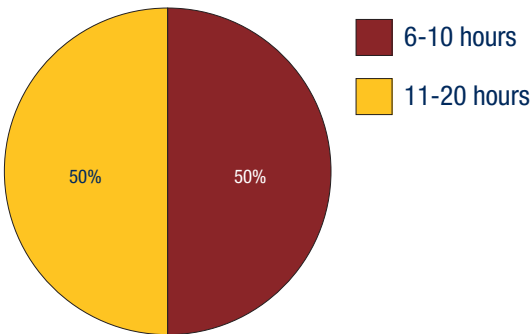
In order of importance

- Excellent communication
- Ability to motivate
- Networking/relationship building
- Public speaking/presentation
- Strategic thinking

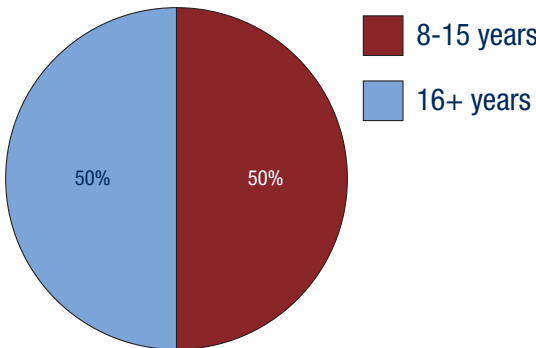
Frequency of Commitments



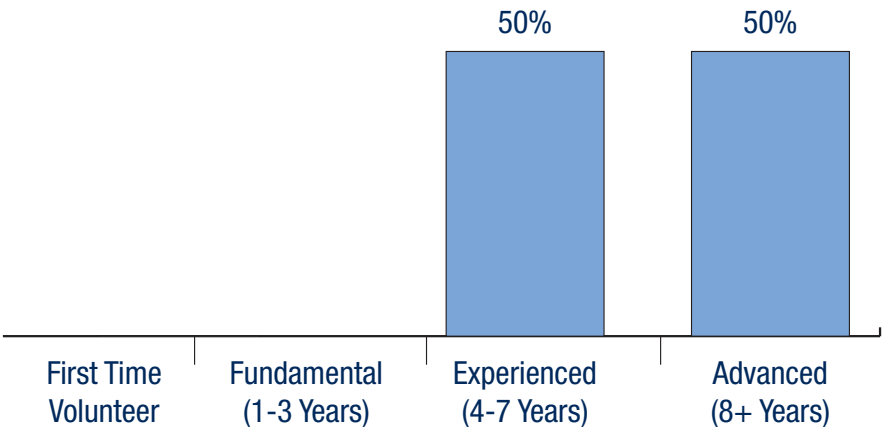
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Education Chair

Role Description

Volunteer responsible for the overall educational strategy to meet the chapter’s professional and career development needs, as well as the sourcing of speakers, content and continuing education (CE) approval. This volunteer works closely with the events and programs chair and the new designee, candidate and student development chair to ensure that the content of each educational event meets the needs of individuals at various stages of their careers.

Roles and Responsibilities

In order of importance

- Source and coordinate speakers and educational content for events and programs to meet the chapter’s needs.
- Recommend strategies to improve the chapter’s professional development programs.
- With the events and programs chair, develop a plan for the educational needs of each event.
- Maintain a line of communication with members to ensure their educational and career development needs are being met.
- Invite key influencers from the industry to participate in events.
- Attend chapter board and membership meetings and events as needed.
- Manage the CE application process for each event, as necessary.
- With the new designee, candidate and student development chair, develop a plan to meet the educational needs of each stage of career development.
- Maintain relationships with current and potential speakers.
- Develop and implement a succession and transition plan.
- Coordinate chapter research projects and oversee project content, goals and progress, if applicable.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

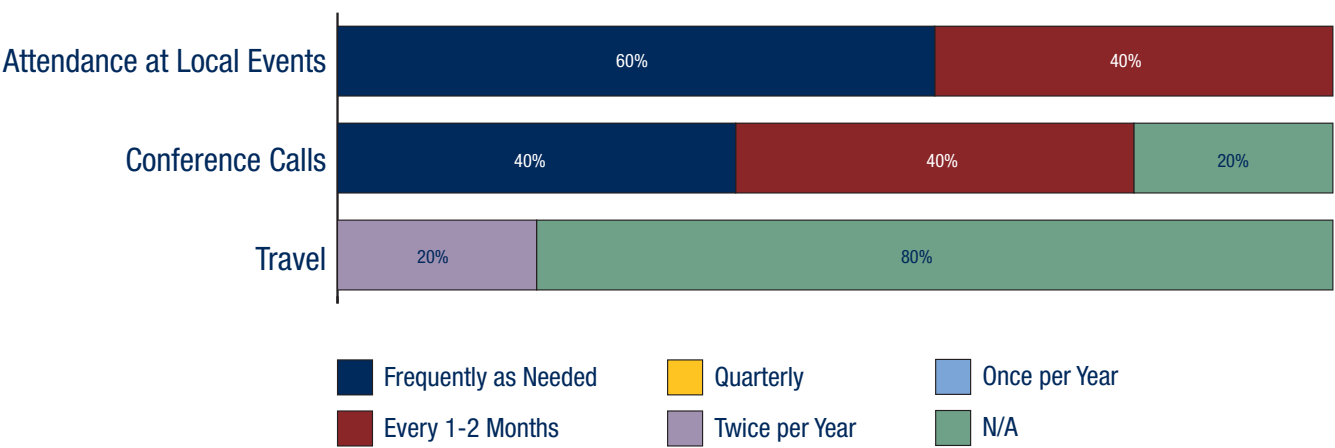
- Knowledge of CPCU Society Annual Meeting and other CPCU Society educational offerings
- Project management
- Knowledge of CE approval process
- Content and curriculum development
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

Leadership Skills

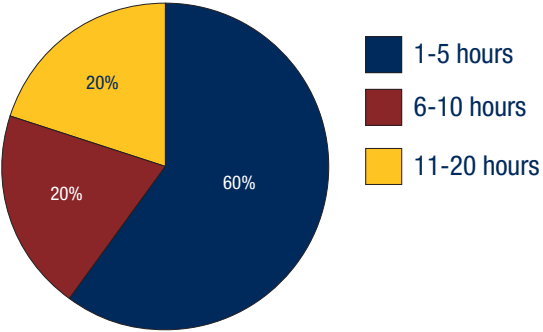
In order of importance

- Excellent communication
- Active listening
- Networking/relationship building
- Facilitation
- Strategic thinking
- Time management
- Negotiation

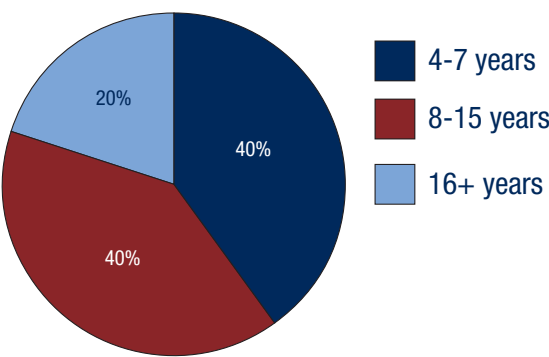
Frequency of Commitments



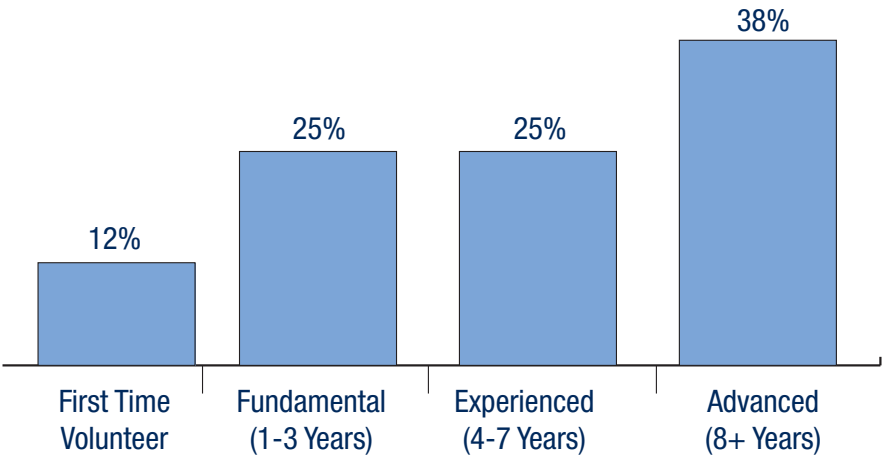
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Events and Programs Chair

Role Description

Volunteer charged with planning and implementing chapter meetings, social and networking events, and online programs in order to engage current and prospective members. This volunteer works closely with the education chair to ensure high-quality professional development offerings, such as the annual I-Day event.

Roles and Responsibilities

In order of importance

- Spearhead special events development and implementation, which may include Good Works projects, I-Day events, group socials and so forth.
- With the membership chair, develop regular networking opportunities to keep members engaged and encourage recruitment.
- Manage contract and vendor negotiation process, as appropriate.
- With the education chair, plan content and speakers to engage members and help the chapter meet its strategic educational goals.
- Maintain budget of expenses and revenue for each event.
- Attend chapter board meetings as needed.
- Develop and implement a succession and transition plan.
- Develop a detailed agenda for each member event.
- With the communications chair, oversee the marketing of all events and programs.
- As needed, schedule, logistically coordinate and attend chapter member meetings.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

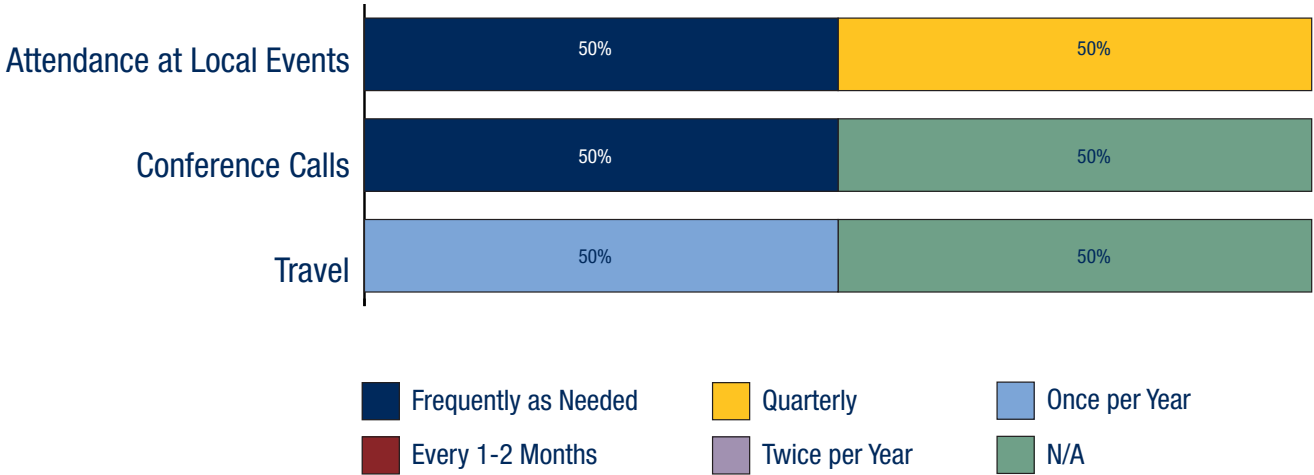
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Basic budget management experience
- Contract and vendor management
- Online meeting/webinar software (for example, WebEx, GoToMeeting)
- Knowledge of the CPCU Society Annual Meeting and other CPCU Society educational offerings
- Data analysis and reporting
- Knowledge of event and meeting industry
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Project management
- Registration software

Leadership Skills

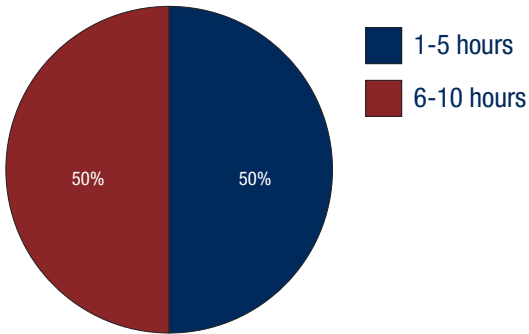
In order of importance

- Active listening
- Adaptability/flexibility
- Facilitation
- Negotiation
- Time management
- Networking/relationship building
- Strategic thinking

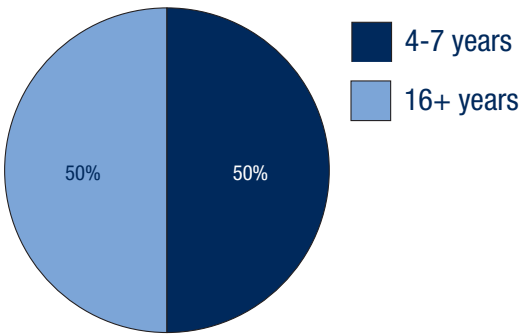
Frequency of Commitments



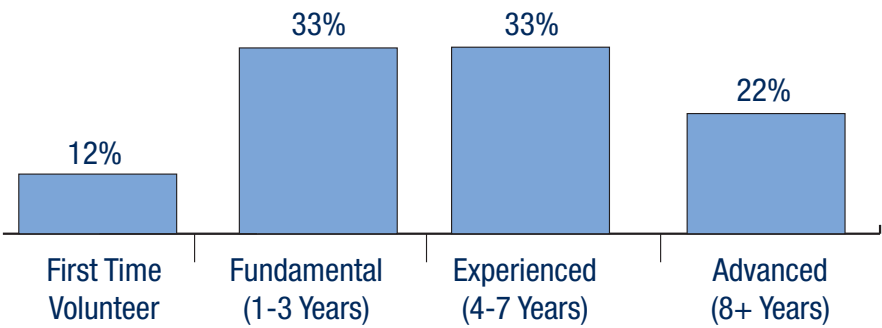
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Chapter Role Description

Communications Chair

Role Description

Volunteer responsible for communicating with the other volunteer leaders, specifically the events and programs chair, the membership chair and the webmaster, to develop and implement strategies to inform and engage current and potential members on member benefits, events and programs, and the value of CPCU Society membership. This volunteer is the driving force behind the creation and distribution of all print and electronic content.

Roles and Responsibilities

In order of importance

- Coordinate the creation and distribution of email and print communications both internally and externally.
- Maintain a communications plan and calendar, and review results to ensure that goals are met.
- Manage the sourcing, editing and distribution of any chapter publications, including a newsletter, e-gram or journal.
- With the webmaster, maintain up-to-date and engaging online content.
- With the events and programs chair, create a plan and carry out the marketing of chapter member meetings, programs and special events to the appropriate audiences.
- Provide updates and recommendations to the appropriate officers regarding marketing and communications campaigns for chapter events and initiatives.
- With the webmaster, draft and coordinate a schedule of engaging social media content.
- Attend chapter board meetings as needed.
- With the membership chair, create a plan for membership renewal outreach communications.
- Develop and implement a succession and transition plan.
- Oversee the relationship with the press, as appropriate.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

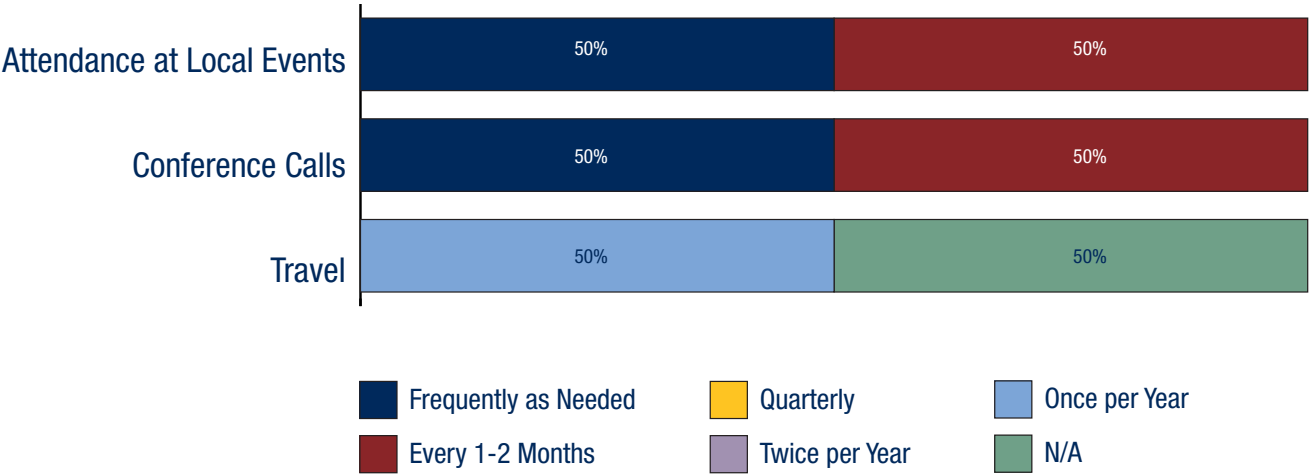
- Exceptional composition and grammar
- Proficient in copywriting, editing and proofreading
- Strong understanding of social media and online media trends and best practices
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Basic graphic/document design experience
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Knowledge of CPCU Society Annual Meeting and other CPCU Society educational offerings
- E-blast software experience (for example, Constant Contact)
- Project management
- Basic marketing experience
- Data analysis and reporting

Leadership Skills

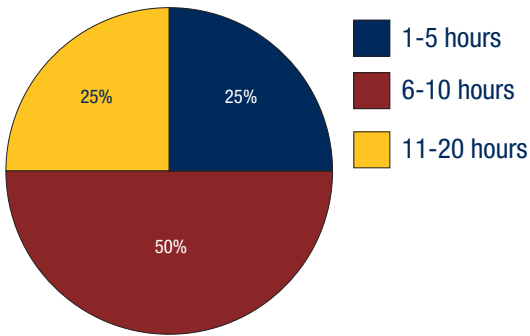
In order of importance

- Excellent communication
- Time management
- Strategic thinking
- Adaptability/flexibility
- Active listening

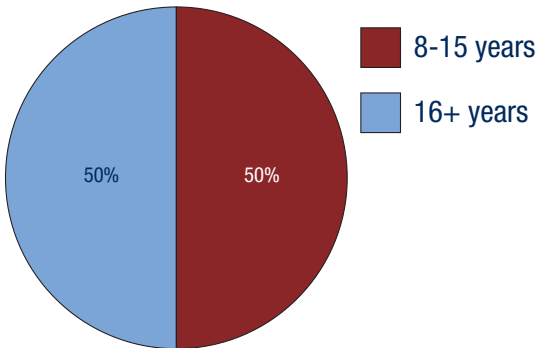
Frequency of Commitments



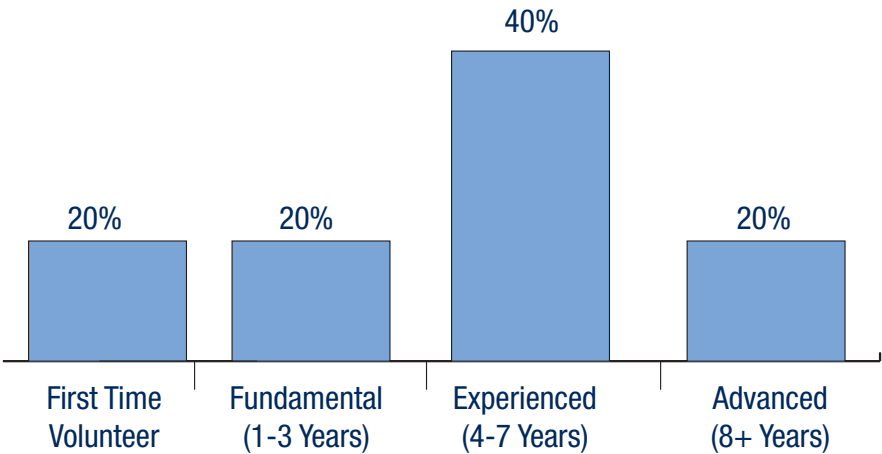
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Interest Groups

The CPCU Society’s 8 interest groups deepen members’ professional insight and vision. They also provide dynamic, specialized views of the risk management and insurance industry across disciplines and functional areas. Interest group leadership creates invaluable opportunities for members to participate in governance and committee work.

Agent & Broker Interest Group

The Agent & Broker Interest Group provides resources for the pursuit and exchange of information centered on the underwriting discipline. Our goal is to offer pertinent cutting-edge information of interest to all insurance and financial services professionals via newsletters, webinars, annual meeting seminars, and social media. Whether online or in-person, you’ll often see our content focused on “How to sell like a CPCU.”

Claims Interest Group

The Claims Interest Group is an active and inclusive community of claims-focused professionals who support the personal and professional development of our members. This includes peer mentorship, knowledge sharing and the development of publications, webinars, and seminars that speak to the array of claims related topics which are impacting the insurance industry.

International Insurance Interest Group

The International Insurance Interest Group, popularly known as the 3iG, is among the CPCU Society’s most active interest groups (IGs). It consists of a large, active leadership with members from countries around the world. Its mission continues to be to “increase awareness of the international perspectives of insurance and risk.” Driven by that goal, the 3iG has played a significant role in making contacts and assisting with the formation of several international chapters, as well as in helping to create informal, international developmental groups.

Legal, Coverage, Regulatory, Education & Witnesses (L’CREW) Interest Group

The courtroom, the classroom, and the conference room; these are among the many places you will likely find members of the CPCU Society’s Legal, Coverage, Regulatory, Education, Witness Interest Group (commonly known as L’CREW). Members of the L’CREW Interest Group share a commitment to the pursuit and application of sophisticated technical knowledge in the fields of risk and insurance, the surrounding legal environment, and the federal and state regulatory insurance arena. We encourage our members to participate by presenting and joining educational sessions at In2Risk, where we host the always popular “Mock Trial” and “Game On” sessions. We also encourage members to publish articles in Insights and other industry journals, and contribute to the growing number of webinars offered by the CPCU Society.

Professional Growth & Development Interest Group

The Professional Growth & Development (PG&D) Interest Group provides programs and resources for members who strive to be their best through professional growth and development. We are dedicated to furthering professionalism within our industry, encouraging continued professional development, and increasing public awareness of the value of the CPCU designation and the CPCU Society’s commitment to the highest standards of ethical behavior and continual learning. PG&D Interest Group also provides members with the opportunity and resources to become mentors by connecting CPCUs looking for guidance with others who have been there before and are looking to give back. Whether you are a CPCU looking for a mentor, looking to be a mentor, or both, you have come to the right place!

Reinsurance & Excess Surplus Lines Interest Group

The Reinsurance and Excess Surplus Lines Interest Group is a networking, learning, and professional development community of insurance professionals involved in either the non-admitted excess and surplus lines (E&S) market, the admitted specialty lines market, or those working in the reinsurance field. We provide ongoing learning opportunities relevant to our members and produce live sessions, webinars, and articles on current topics. Members of this Interest Group are encouraged to actively participate by suggesting timely webinar topics, contributing to our forum, joining the IG committee, and more. Don’t miss our annual Reinsurance and Excess Surplus Lines Virtual Symposium happening each March!

Risk Management & Loss Control Interest Group

The Risk Management and Loss Control Interest Group imparts knowledge, information, and expertise on risk management and loss control subjects. We act as a risk management and loss control resource for those inside and outside of the CPCU community. We also promote networking opportunities to develop a community of those interested in risk management and loss control within the Society and encourage ethical behavior in all business transactions. The Risk Management & Loss Control Interest Group is very active in coordinating webinars based on emerging trends and encourages you to get involved and share your expertise.

Underwriting Interest Group

The Underwriting Interest Group provides pertinent, cutting edge information of interest to all insurance and financial services professionals in our industry. We are actively involved with CPCU Society programming; contributing to Insights (the Society’s professional journal) and developing relevant webinars and seminars. Whether you have an agency, or a company focus, work in underwriting or claims, or are a provider or purchaser, our team will help you meet colleagues and learn about all aspects of insurance - both professionally and personally. We extend you a sincere “Welcome!”

Volunteer Interest Group Role Description

Chair

Role Description

Volunteer responsible for overall oversight of the interest group and other officers. The chair directs activities of the other leaders in accordance with the interest group operational plan to meet strategic goals.

Roles and Responsibilities

In order of importance

- Strive to achieve the interest group’s vision, mission and objectives as detailed by the interest group leadership and the CPCU Society strategic plan.
- Direct activities of other officers toward interest group goals and objectives.
- Assume responsibility for the overall functioning of the interest group.
- Establish and maintain financial operations processes to ensure continuity of interest group operations, and define, document and maintain interest group policies.
- Develop, maintain and manage the interest group’s budget.
- Ensure that the interest group leadership works together as a team.
- Represent the interest group at public events.
- Attend, organize, support and preside over interest group meetings (monthly).
- Direct projects in support of the interest group’s strategic goals.
- Review any interest group contract, agreement and insurance.
- Recommend improvements in operational processes.
- Serve as liaison with the CPCU Society.
- With the Leadership Council president, develop and implement a succession and transition plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- Analyze cost impact and income benefit of all activities proposed by the interest group leadership.
- Provide monthly financial reporting regarding the state of finances of interest group activity to executive-level volunteer leaders.

Role-Specific Skills

In order of importance

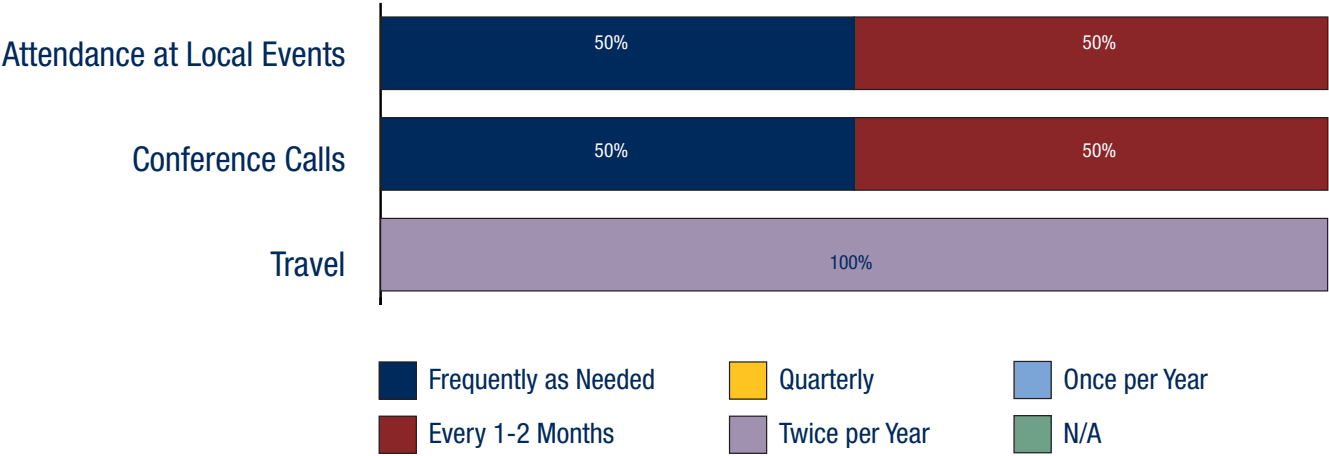
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Organization management
- Legal awareness
- Project management
- Financial and budget planning
- Accounting software/tools (for example, QuickBooks, Excel)
- Knowledge of generally accepted accounting principles (GAAP)

Leadership Skills

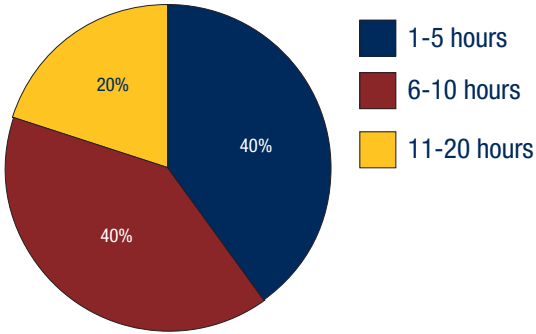
In order of importance

- Ability to delegate effectively
- Adaptability/flexibility
- Strategic thinking
- Facilitation
- Networking/relationship building
- Team building
- Public speaking/presentation
- Conflict resolution
- Time management

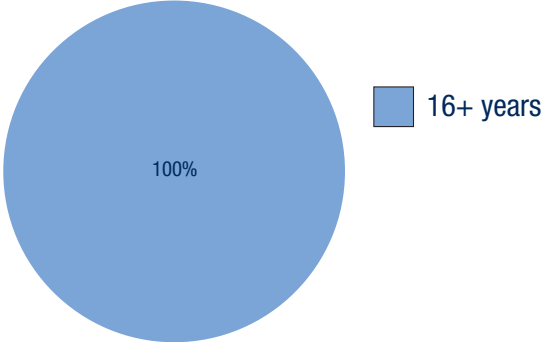
Frequency of Commitments



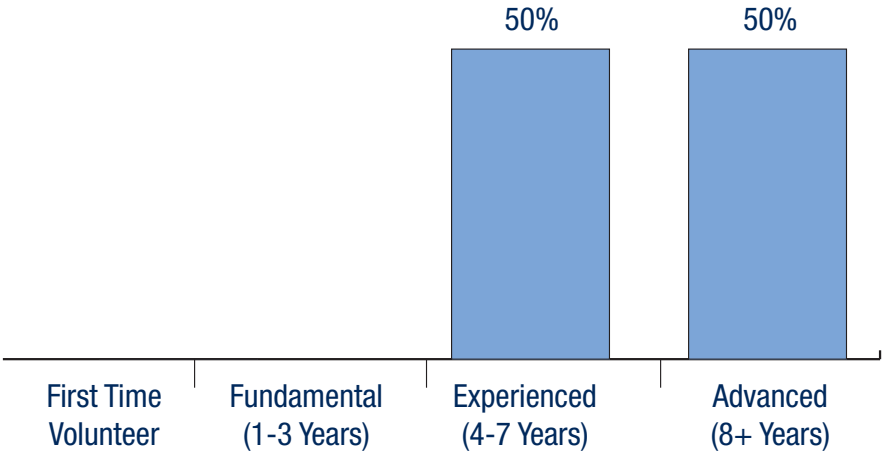
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Vice Chair

Role Description

Volunteer who will assist the chair with his or her duties of managing the interest group and assume the role of the chair if the current chair is unable to perform duties for any reason.

Roles and Responsibilities

In order of importance

- Represent the chair in his or her absence or if the chair is unable to perform duties.
- Assist the chair in his or her duties.
- Attend all interest group meetings.
- Oversee the operations and strategic projects of the interest group.
- Assist in directing the activities of other officers toward interest group goals and objectives.
- Contribute to the financial planning, goal setting and budgeting for the interest group.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- With the Leadership Council president, develop and implement a succession and transition plan.

Role-Specific Skills

In order of importance

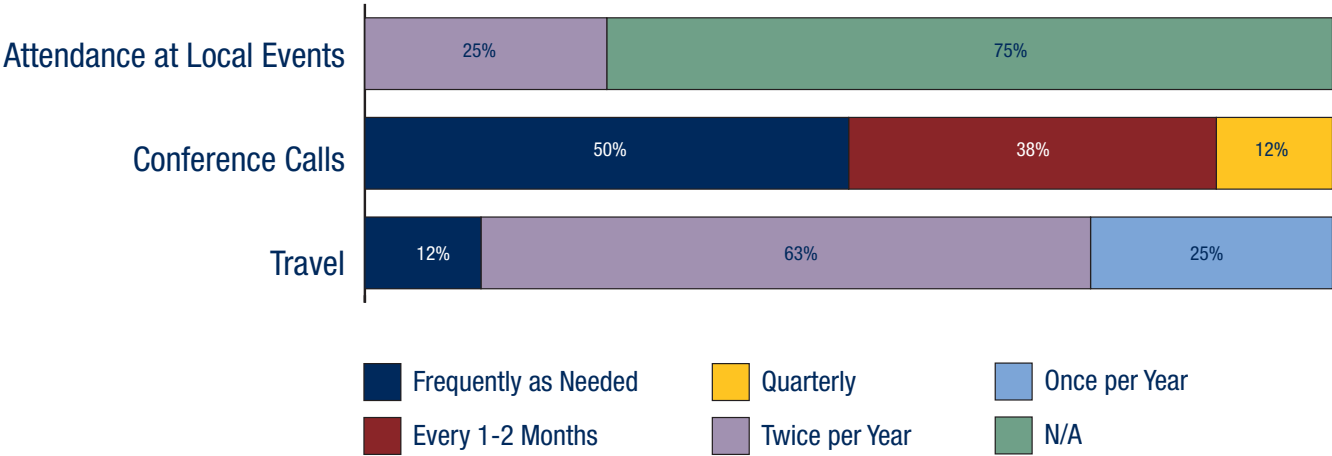
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Resource management
- Financial and budget planning
- Project management

Leadership Skills

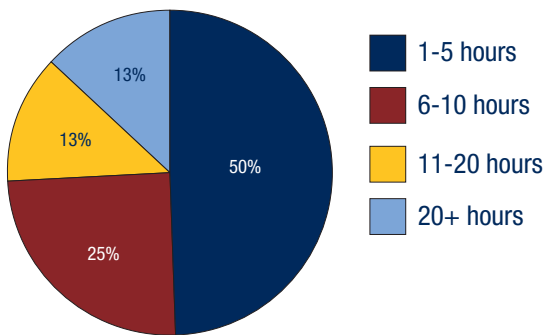
In order of importance

- Active listening
- Networking/relationship building
- Strategic thinking
- Adaptability/flexibility
- Ability to delegate effectively
- Team building
- Public speaking/presentation

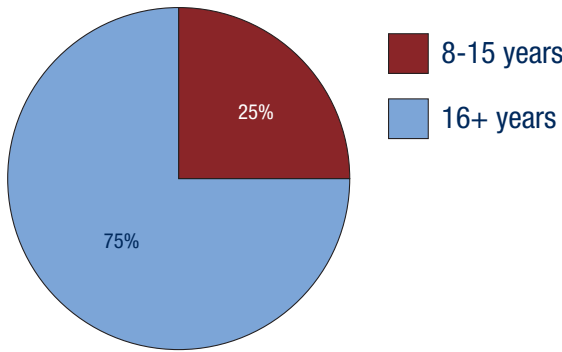
Frequency of Commitments



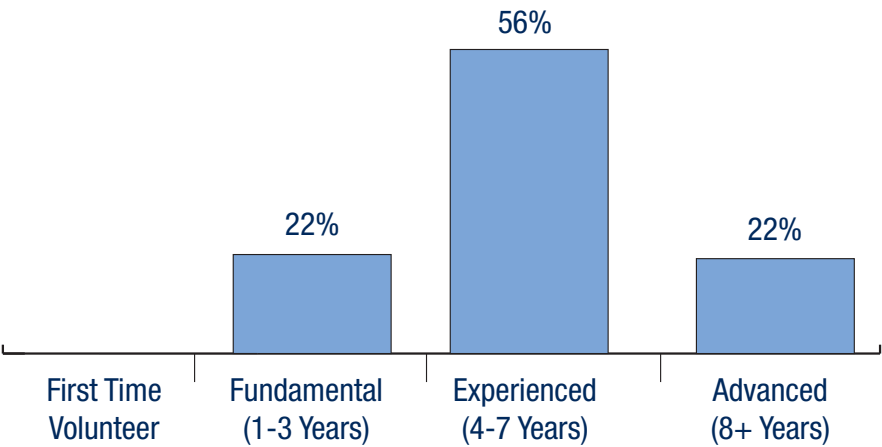
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Committee Member

Role Description

Volunteer who will assist the chair with his or her duties of managing the interest group and assume the role of the chair if the current chair is unable to perform duties for any reason.

Roles and Responsibilities

In order of importance

- Complete projects consistent with the work of the group as delegated.
- Attend all interest group meetings.
- Maintain working knowledge of interest group affairs and initiatives.
- Suggest and critically evaluate initiatives to meet strategic goals.
- Provide reports to the chair about ongoing projects.
- Generate interest for the group among CPCU Society membership.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

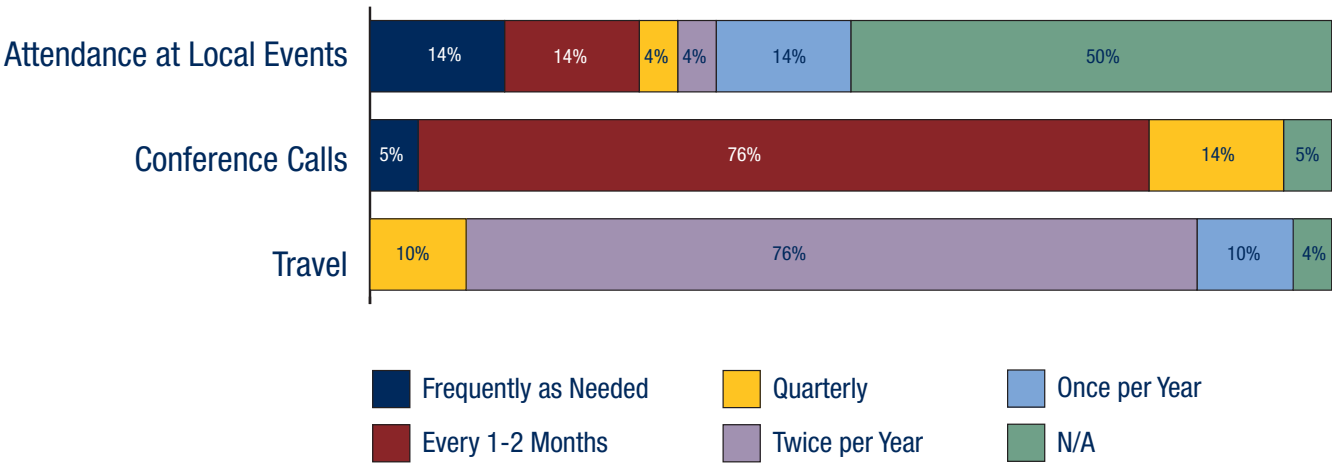
- Project management
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

Leadership Skills

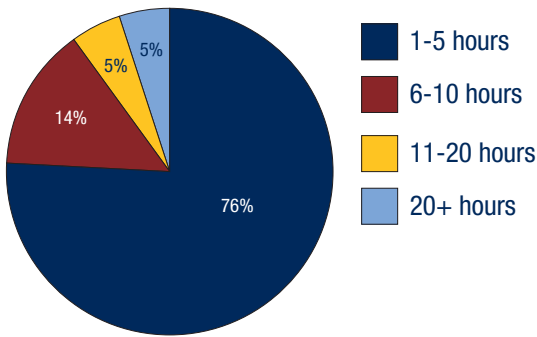
In order of importance

- Active listening
- Adaptability/flexibility
- Strategic thinking
- Team building
- Excellent communication

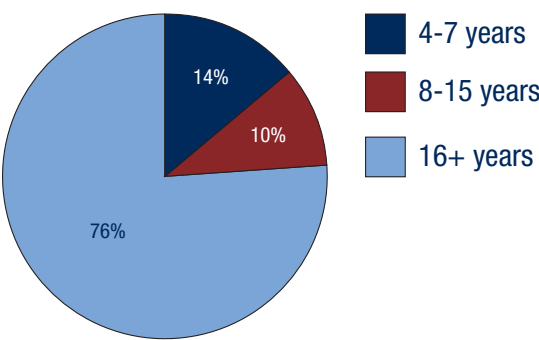
Frequency of Commitments



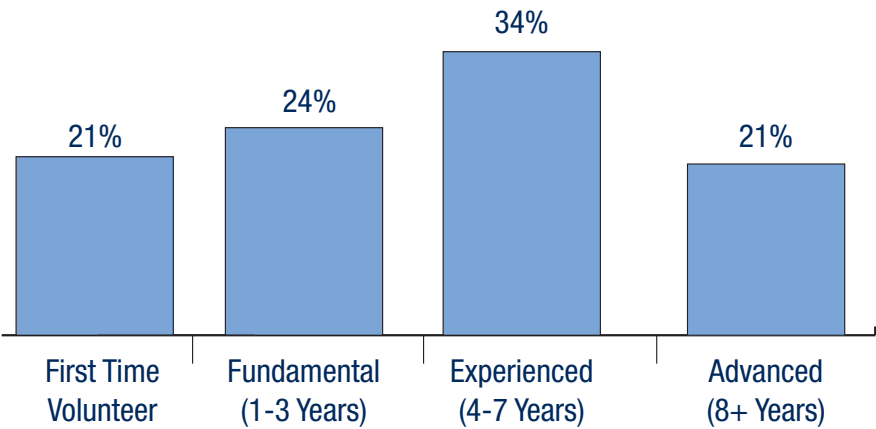
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Webmaster/Social Media Chair

Role Description

Volunteer tasked with maintaining an up-to-date and engaging online presence through the interest group’s designated web page(s) and/or social media.

Roles and Responsibilities

In order of importance

- Continually review website content for necessary updates.
- Maintain a channel of communication with officers and members to gather and post appropriate content.
- Post and remove content as needed.
- Attend all interest group meetings.
- Ensure alignment with Society social media, website, branding and best practices.
- Keep abreast of cutting-edge web trends to ensure that the interest group remains technologically up-to-date.
- Develop and implement a succession and transition plan.
- Monitor and aim to increase measurable activity and user interactions for all social media outlets.
- Generate awareness of volunteer opportunities at the local and global levels.
- Identify key online channels for the interest group to establish a presence.
- Keep social media channels updated, ideally on a daily basis.
- Encourage others to comment on posts and share them with others.
- Develop a social media strategy to support the interest group and the Society’s vision/strategic plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

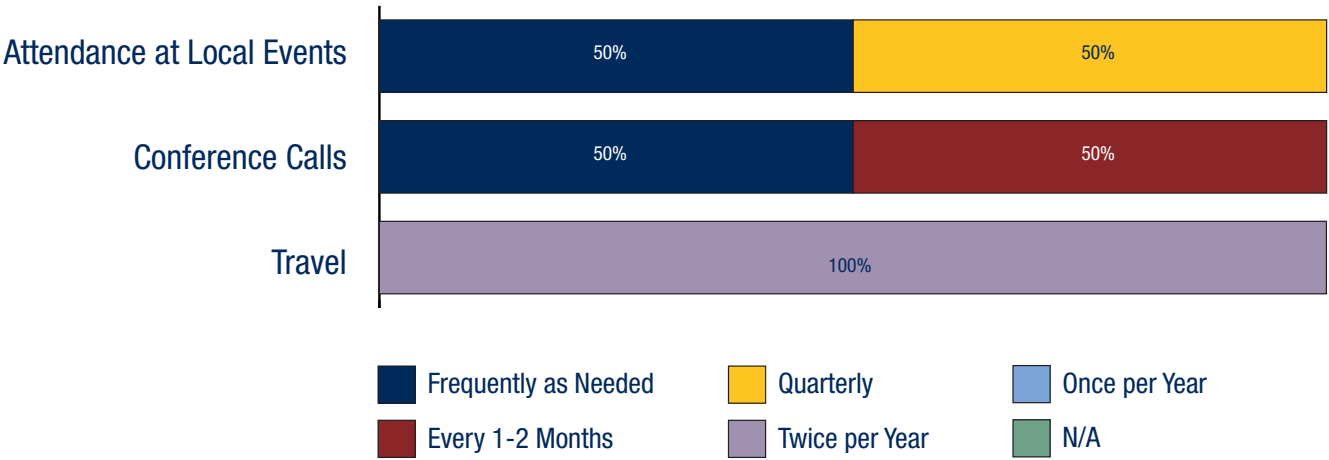
- Exceptional composition and grammar
- Proficient in copy writing, editing and proofreading
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Basic marketing experience
- Proficient use of Microsoft Office tools, such as Word, Adobe Acrobat and Outlook
- Project management
- Proficient use of social media (for example, Twitter, Facebook, LinkedIn)
- Strong understanding of social media and online media trends and best practices
- Strong website software experience (for instance, Drupal, WordPress)

Leadership Skills

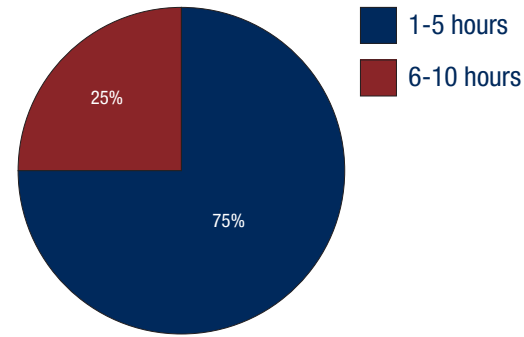
In order of importance

- Active listening
- Excellent communication
- Strategic thinking
- Adaptability/flexibility
- Time management

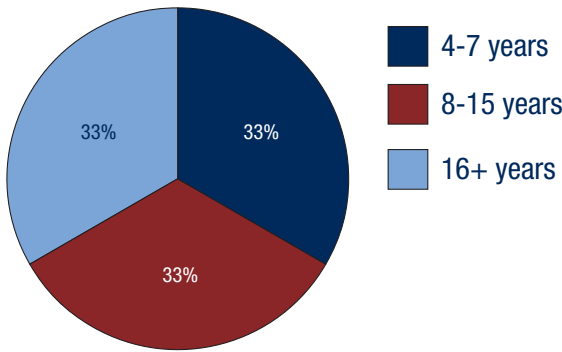
Frequency of Commitments



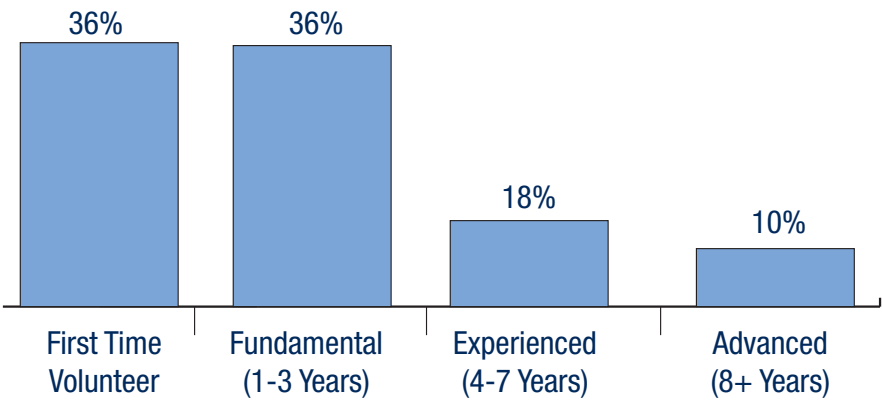
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience





www.CPCSociety.org