

2017 Circle of Excellence

Chapter Submission for the Colorado CPCU Society Chapter

Strategic Goal #1: Provide relevant knowledge.

- Minimum of two events are held per year
 - Offered 24 hours of technical insurance education and additional educational opportunities as follows:
 - January 2017 chapter meeting – PT&C/LWG Forensic Consulting Services presentation on Determining Damage to Composition Shingles Roofs, 1 CE
 - February 2017 chapter meeting –Dixie Eastridge presented Signs and Impacts of Concussions, 1 CE
 - March 2017 chapter meeting –Ethics month. Ethics Presentation by Kevin Hammons teacher at Metro State University on Fire Safety. 1 CE at Lunch and additional afternoon session with 2 CEs.
 - April 2017 chapter meeting-Gary Hahn presented Agents E&O, 1 CE
 - April 21, 2017 Partnered with AEI Corporation who offered Carbon Monoxide information with 1 CE
 - May 2017 chapter meeting-Oil and Gas Fires by Faye Engineering, 1 CE
 - June 2017-chapter social, Pedal Hopper Event.
 - August 2017 chapter meeting- Homeowners total 3 CE- Lunch John Putnam 1 CE Homeowners on HO Valuation Protection Gaps: Industry and Consumer Opportunity or Threat and in the afternoon Eberl Claims Service presenting Understanding Estimating Platform Valuations and Pricing Methodology 2 CE
 - September 2017 chapter meeting- Five Things They Didn't Teach Me About Starting a Business, no CE
 - October 2017 chapter meeting- Ameriprise Financial Advisor on Retirement and College Savings, no CE
 - Partnered with AEI Corporation who offered CPCU's to attend a live burn, 1 CE
 - November 2017 All Industry Day
 - 2017 New Designee Conferment
 - Attracting Millennials- no CE
 - RMIIA Hero Award and Colorado Industry Update, no CE
 - Cyber Risk and Insurance, 1 CE
 - Organic vs. Non-Organic Pain, Secondary Gain and Unnecessary Knee Replacements 1 CE
 - CSST-Lightning Caused Fires 1 CE
 - Looking for Leaks in all the Wrong Places- 1 CE
 - The Ethics of Subrogation Handling 1 CE
 - Private Flood Insurance 1 CE
 - Leading with Passion-Current Events and Trends that are Impacting Insurance and Risk Management-no CE
 - Combustion Accidents Explained, 1 CE
 - Good Faith and You 1 CE
 - Asbestos and Claim Handling 1 CE

- Entrepreneurship and Compliance-They Can Work Together- 1 CE
- Energy Exposures and Risk Management Challenges- 1 CE
- The Attorney and the Expert Witness-How to Avoid Ethical and Communication Pitfalls 1 CE
 - December 2017 chapter meeting and social- free to all Chapter Members, Candidate members and GIS students.
- Held annual All Industry Day event in November 2017 where approximately 100 individuals attended (including speakers and 17 industry partners). At this event, we offered 12 hours of CE both in general sessions and breakout sessions (see above).
- Promoted interest groups at chapter meeting 101717 and board meetings. President discussed her involvement in the underwriting interest group and the benefits of being involved.
- President as a member of the underwriting interest group presented Webinar- Joint Effects: Marijuana, Driving and Testing for Impairment on 092617.
- We have a strong insurance education program associated with the Colorado Chapter. In 2017 a total of 127 individuals from the Denver Metro and the Colorado Springs area took courses through our program in 16 separate courses.
- Partnered with RMI students and Gamma Iota Sigma on a toy drive to support Children's Hospital December 2017. Students attended December Social free of charge.
- Gary Hahn wrote many focus articles in 2017 to provide relevant knowledge:

2017/02	Unified Registration System (URS) from FMCSA
2017/03	Wildland Fire Risk Control
2017/04	Country Home Product
2017/05	Enhance Your Expertise: Commercial Product Training
2017/06	Tips to Help Policyholders Protect Homes During Summer Vacation
2017/07	The Ten Deadliest Driving Distractions
2017/08	A Guide to Portable Fire Extinguishers
2017/09	2017 Colorado Auto Market and Factsheet
2017/10	2017 Colorado Homeowners Market and Factsheet
2017/11	Dog Bite Prevention
2017/12	Enjoy a Safe Holiday Season

- Gary Hahn wrote the following articles for our Chapter newsletter:
 - Essential Tips to Avoid Agents E and O (1st quarter 2017 issue)
 - Wildland Fire Risk Control (2nd quarter 2017 issue)
 - A Guide to Portable Fire Extinguishers (4th quarter 2017 issue)
- Mary Strain composed 3 Chaptergrams in 2017:
 - January, April and December articles focused on events, ways to become involved and industry information trends and knowledge.
- Mindy O'Brien wrote an article for NAHLE (National Association of Hotel and Lodging Engineers) that was included in their February 2017 Magazine,
- Conduct a meeting in support of diversity and inclusion during a chapter meeting:

- For our September meeting we brought in Youth Biz as our charity of the month. The mission of Youth Biz is to advance the social and economic prosperity of youth through the study and practice of entrepreneurship. Our President elect volunteers for this organization.
- For our October meeting, our charity was Arkansas Elementary a diverse school in need of assistance. Our chapter partnered with them to help with their Trunk or Treat event and science fair. The chapter President also volunteered at their Holiday program.
- Colorado Chapter Recruitment and Retention Numbers
 - Membership Conversion Rate for New Designees = 30%
 - Membership Retention Rate = 82%
 - Total Chapter Membership = 236
- Membership Conversion rate for new designees was 30%.
 - We sent personalized notes and a customized welcome kit to each new designee along with an invitation to attend a free chapter meeting
 - For our December social, we invited students from Risk Management Program for no charge with positive feedback: "Thank you all for chatting up the students. Several told me how nice (surprise) everyone was, much less intimidating than attending RIMS, and very enlightening, as they spoke with people about jobs they had never knew existed, and now are interested."
 - We offer to sponsor RMI students at each monthly meeting and this does happen frequently.
 - We honored the new designees at our I Day and their registration was at no cost.
- Membership retention rate was 82%.
 - Board members reached out personally to unpaid chapter members at their companies to encourage them to pay their dues
 - At the October meeting, discussed the benefits of being involved and highlight the CPCU interest groups and ways to sign up.
 - In our Chaptergrams provided information on becoming involved and the benefits of membership. These are sent out as well as posted on our Colorado Chapter web site.

Strategic Goal #2: Empower Professionals to Succeed

- Leadership transition/succession plan in place and implemented annually. Elements of the plan should include transitions checklist, training plan for incoming officers, role descriptions for officers/committee chairs
 - A transitions checklist, training plan for incoming officers and role descriptions are included in our chapter plan.
 - E mailed COE plan for 2017, transition checklist and chapter roles and responsibilities for definitions of each role 120617 to the board.
 - We posted job openings on our web site and announced them at monthly meetings
 - At our 121917 board meeting, read mission statement and asked if all understood positions-time for questions and clarification.
 - Our secretary, and director of operations remains the same. We have a new treasurer and Kathy Bell (outgoing treasurer) and Colleen Davis (incoming) have met at least three times to hand off duties and explain the role.
 - Our chapter plan is posted on our Colorado Chapter web site.
- Minimum of one chapter officer attends the Leadership Summit annually

- In 2017, we had the President Elect, Barbara Sidwell attend the Leadership Summit.
- Sue Snyder and Gayle Hise attended the Western Regional Chapter Leader Meeting in May of 2017 held in Las Vegas. This was paid for individually and not out of chapter funds.
- Chapter operating plan is defined and submitted for 2017 no later than December 31, 2016.
 - Our chapter submitted the operating plan for 2017 December 30, 2016.
- Final 2017 planning and activity reporting form is submitted to Chapter Governor and emailed to chapterservices@cpcusociety.org by 013118.
 - This will be submitted by our president elect by this date.

Strategic Goal #3: Engage Future Generations of Leaders

- Minimum of two events per year are held.
 - We held regular chapter meetings in January, March, April, May, August, September, and October where RMI students were invited- option for members to sponsor a student at each meeting.
 - Breakfast meeting was held in February.
 - Socials in June and December where students were invited.
 - We continued our connections visits with area companies to attract new students to the program. Our Insurance Education Director, Gayle Hise, spearheaded our connections visits in 2017. She involved CPCUs from the companies she visited where possible. She held many in-person visits.
 - Insurance Education Director sends out e-mails to new insurance designee holders of the IIA designation. We congratulate them and let them know they have taken a first step toward earning the CPCU designation as the IIA can waive one part of CPCU. We inform them they will be receiving our newsletter, meeting invitations and point them toward the National CPCU web site as well as our chapter web site for more information.
 - Insurance Education Director sends out e mails to people who are working on their designation from the parts to credit report. We congratulate on their progress, provide information on education, meetings, candidate membership information and point them to both the Colorado and national website. This is done several times a year.
 - Conferment celebration held at I-Day November 7th- It was the first item on the agenda.
 - Worked with other Insurance Organizations like RMI and RMIIA to promote CPCU events
 - Colorado Chapter is an Associate Member of RMIIA and our Chapter President represented the chapter's interests on the RMIIA board.
 - Sponsored and volunteered at RMIIA's Insurance Day at the Capitol March 7, 2017. CPCU was a sponsor of this and received recognition. It was hosted by RMIIA, Piiac, CPCU and RMPCA. President elect included RMI students to this event.
 - Gayle Hise teaching a Junior Achievement class at Dillon Valley Elementary. It's a 5-week class (1hour each week). The class is the JA Our City program and focuses on city's, the people, the jobs, finance, etc. Gayle shares with the kids what she does or have done as a career in insurance.

- Gary Hahn has presented multiple classes to agents- 20 classes to 92 agents. Classes include: Personal auto, Homeowners/Dwelling property, Farm package policy, agents E&O, and Commercial II. He also developed new online training modules such as Anti-Fraud training, commercial business auto insurance coverage, commercial general liability coverage and commercial property insurance coverage presented to all agents.
- Worked with the CU Denver RMI Program - president elect is the Relations Manager for the Risk Management and Insurance Program:
 - President elect was involved in the following activities:
 - January 27, 2017 Organize Spotlight on Lockton Shadow Day with 15 students participating
 - Jan 13, 2017 – Proctored UACIC Exam for 10 CU Denver RMI Students
 - Feb 2, 2017, Attended Surplus Lines Class at TCCO with 4 RMI Students
 - Feb 6-7 Attended California Surplus Lines Association Annual Meeting with two RMI students
 - Feb 28, 2017 Attended Diversity in Career Networking Recruiting Event at CU Denver
 - March 3, 2017, Attended First Friday and learned about CareerWise Colorado
 - March 7, P&C Day at the Capital with two RMI students
 - March 10, Organize Spring RMI Shadow Day with 40 students and 20 companies participating
 - March 21, 2017 Emotional Intelligence Training 4 hours at University of Colorado Training
 - March 31, How Insurers Can Close the Talent Gap Webinar
 - April 15 – 18 Attended CPCU Leadership Summit in Washington DC
 - April 21 Organized Spotlight on IMA Shadow Day, 14 students participated
 - May 25 Diversity in the Workplace Webinar by TRINET
 - June 20 Bystander Training Seminar
 - June 2017 – Nov 2017 – Chair Bi-weekly and weekly I Day Organizational meetings
 - Sep 14 Attended TCCO Annual Conference and Seminar
 - September 21 Attended RIMA Annual Educational Seminar
 - September 22 Organized Spotlight on Aon Shadow Day, 14 students participated
 - September 25 NAMIC Conference Attendance with 19 students in Denver, September
 - September 25 Interviewed on AM BEST TV on recruiting students into industry

<http://www.ambest.com/video/MediaArchive.aspx?lid=5582634982001&vid=5589072351001>

- October 6 Attended All Colorado Business School Career Fair, Assisted BCC
 - October 27 Organized Fall 2017 Shadow Day with 40 students and 21 companies who participated
 - President elect is also Staff Advisor for CU Denver RMI Program Beta Mu GIS Club, meeting monthly, support student activities, plan events, etc.
 - She also performs class presentations to recruit students to RMI class and program, approximately 40 per semester.
 - Matthew Ward also participated with the RMI program as a panelist for the program and RMI student shadow day.
- Sue Snyder trained 648 agents in 2017 via webinars, face to face and workshops in commercial lines. Discussed involvement with CPCU and benefits at many of these events. The workshops are as follows:
 - March 15th and 16th-Businessowners Fundamentals in Houston, Texas
 - March 22nd and 23rd-Businessowners Fundamentals in Denver, CO
 - April 5th and 6th-Commercial Package Basics in San Antonio, Texas
 - June 28th and 29th- Commercial Package Basics in Dallas, Texas
 - July 18, 19 and 20th-CLCS designation workshop in San Antonio, TX
 - August 16th and 17th-Businessowners Fundamentals in Salt Lake City, UT
 - September 12, 13 and 14th-CLCS designation workshop in Denver, CO
 - September 27 and 28th-Commercial Package Basics in Salt Lake City, UT
 - October 25th and 26th-Commercial Package Basics in Denver, CO
- Mindy O'Brien taught 31 various CE courses in 2017 with a total of 144 agents in attendance.
- Partnered with Beta Mu chapter of Gamma Iota Sigma on a toy drive to support Children's Hospital December 2017. GIS Beta Mu acting president David Aduagna wrote an article about the toy drive partnership as a highlight of his year.
- Provided \$1000 for Bill Dye Scholarship to be awarded to chapter members and/or dependents in accordance with chapter scholarship criteria. This year's scholarship was presented to Hadley Tallackson. Presented at August meeting and president sent follow up email to family of Bill Dye to notify about the reward and honor of Bill also at our IDay with table of memorabilia from Bill.
- Provided members signing up for monthly lunch meetings the ability to sponsor a student for the same meeting
- During each of our monthly meetings we featured a charity of the month. The chapter matched the donations of our members
 - The charities are based on what is important to our Members and requests are received from our Members.
- Chapter website is current and accurate
 - Promoted what we do for our members via our website and newsletters
 - Kept chapter website current with links to events and information

- Posted I day photos including RMI students.
 - Posted articles on the website.
 - We also post job openings on our website on a regular basis. (at each chapter meeting we save a time for employment opportunities.)
 - Chaptergrams to keep members updated on the Colorado Chapter are added quarterly on the web site. This includes spotlight of members, event information, membership benefits, letter from the President, chapter meeting information, education opportunities etc. January, April and December Chaptergrams were completed.
 - Currently working on updating leadership from 2017 to 2018.
 - Multiple times a year we use CVENT to advise our members of meetings, to provide current updates and relevant information. This occurs at least once per month. Moving to constant contact in 2018 for financial savings.
 - Several members on our board kept our Twitter account current and tweeted relevant information and updates- chapter meetings, special events and IDay information tweeted.
 - We have an active Facebook page
 - 126 likes on our CO CPCU page
 - Jill posted 23 times on our Facebook page in 2017.
 - Posts on upcoming chapter meetings
 - Posts on photos of events
 - We also have an active LinkIn page-
 - IDay information as well as our meetings and special events posted here
 - Gayle posts the Insurance Education Schedule 3 times per year
- A volunteer recognition plan is defined and implemented annually
 - We recognized and provided gifts to members on the I-Day committee at the end of the event.
 - President and President elect gave formal thank you at December social to board members and volunteers.
 - Thank you' s often....