

2018 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 seven hours of technical insurance education and additional educational opportunities as follows:
 - January 2018 Luncheon Chapter Meeting – Mark Slaugh, Founder and CEO of iComply, LLC presented on Reefer Risk Management; Inside Cannabis Industry Compliance” to our largest meeting in several years, packed attendance of about 60 attendees. 1 CE for CO, WY, and TX offered.
 - March 2018 Partnered with RMIIA Rocky Mountain Insurance Information Association and PIIAC Professional Independent Insurance Agents of Colorado to participate in P&C Day at the Capitol. Two GIS RMI Undergraduate students participated
 - March 2018 Chapter Meeting –Ethics month. Colorado CPCU Society partnered with CU Denver Business School, CU Denver Risk Management and Insurance Program, and CU Denver Daniels Fund Ethics Initiative, who hosted an event at CU Denver Business School. Dr. Linda Fried presented on Disruptive Technologies, Innovations, and Ethics. Happy Hour at business school and an additional afternoon networking session at Rhein Haus Social. Excellent RMI student, Business School Industry, and insurance professional attendance. 1 CE for CO, WY, TX.
 - May 2018 Luncheon Chapter Meeting – Robert Force, Director of Coloradans Against Auto Theft (CATPA), presented on raising awareness on auto theft issues and CATPA’s efforts to combat auto theft. 1 CE for CO, WY, TX
 - July 2018 - Chapter Social, Pedal Hopper Event Downtown. Great event with excellent RMI student and CPCU membership turnout
 - August 2018 New Designee Social- Breckenridge Brewery event with excellent attendance and support from Brett Clawson
 - September 2018 Luncheon Chapter Meeting- Carole Walker, Executive Director of Rocky Mountain Insurance Information Association (RMIIA) presented on Hail, Auto, and other Colorado insurance claims issues 1 CE for CO, WY
 - November 2018 All Industry Day – Partnered with CU Denver RMI Program
 - 2018 New Designee Conferment – Welcomed 16 new Designees
 - Me Too and Beyond, Martine Wells, Esq. presented on the Me Too Movement and the insurance and coverage claims impact. 1 CE for CO, WY
 - The World of Mergers & Acquisitions, Danielle Shoots, VP of Business Operations, Comcast West Division, presented on Branding and Reputational Risk in the World of Mergers and Acquisitions. No CE

- Drones in Homeowners Insurance Underwriting, Cory Shelton Development Team Lead for Geomni presented. 1 CO and WY Home CE
- Diversity and Inclusion Keynote by Charles Johnson, Director of Diversity & Inclusion of Ball Corporation. No CE
- RMIIA Hero Award and Colorado Industry Update, Carole Walker, RMIIA Executive Director, presented 2018 Spirit Award to Colorado Fallen Heroes Memorial. No CE
- Ethical Dilemmas in a Technology Driven World presented by CO CPCU Treasurer and Travelers Management Liability and Bon and SI Underwriter Colleen Davis. 1 CO, WY CE
 - December 2018 Luncheon Chapter Meeting and Holiday Social- free to all Chapter Members, Candidate members and GIS students. Colorado CPCU partnered with CU Denver RMI GIS students to support Children's Hospital Toy donation drive.
- Held annual All Industry Day event in November 2018 where approximately 100 individuals attended (including speakers and industry partners). At this event, we offered 3 hours of CE both in general sessions.
- 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. New CPCU Designee and 2019 Board Member is on interest group
- President as a member of the underwriting interest group presented Webinar- Joint Effects: Marijuana, Driving and Testing for Impairment on 092617.
- Partnered with RMI students and Gamma Iota Sigma on a toy drive to support Children's Hospital December 2018 for third year in a row. GIS Students attended December Social free of charge.
- Board members wrote insurance and relevant knowledge articles for three 2018 Chapter newsletters

CE Courses taught by Colorado Chapter Board Members

2018/07	Acuity Personal Lines 2 Cr Mindy O'Brien
2018/07	Acuity Manufacturers CE 2 Cr Mindy O'Brien
2018/07	Acuity Cyber Insurance CE 2 Cr Mindy O'Brien
2018/07	Acuity Workers Comp CE 2 Cr Mindy O'Brien
2018/08	Acuity Commercial Lines Overview CE 2 Cr Mindy O'Brien
2018/08	Acuity Personal Lines CE 2 Cr Mindy O'Brien
2018/08	Acuity Cyber Insurance CE 2 Cr Mindy O'Brien
2018/10	Acuity Commercial Lines CE 2 Cr Mindy O'Brien
2018/10	Acuity Advanced Personal Lines CE 2 Cr Mindy O'Brien
2018/10	Acuity C/L Additional Insured CE 2 Cr Mindy O'Brien
	Acuity Personal Lines CE 2 Cr Mindy O'Brien
	Acuity Commercial Auto CE 2 Cr Mindy O'Brien
2018/11	Acuity Workers Comp CE 2 Cr Mindy O'Brien

Acuity GL CE 2 Cr Mindy O'Brien
Acuity Construction Contracts CE 2 Cr Mindy O'Brien
Acuity Workers Comp CE 2 Cr Mindy O'Brien
Acuity GL CE 2 Cr Mindy O'Brien
Acuity Ethics CE 2 Cr Mindy O'Brien
Acuity Advanced Personal Lines CE 2 Cr Mindy O'Brien
Acuity Construction Contracts CE 2 Cr Mindy O'Brien
Acuity C/L Additional Insured CE 2 Cr Mindy O'Brien

Acuity Ethics CE 2 Cr Mindy O'Brien
Acuity Personal Lines 2 CE Cr Mindy O'Brien
Acuity Commercial Lines 2 CE Cr Mindy O'Brien
Acuity Construction Contracts 2 CE Cr Mindy O'Brien
Acuity WC 2 CE Cr Mindy O'Brien
Five One Hour online CE Courses Acuity Mindy O'Brien

2018/12

- Gary Hahn published articles in FOCUS internal CFBM Agent magazine for agent information and education in 2018
- 2018/03 Ergonomic Checklists
- 2018/06 OMG NO TXT YL U DRIVE (*Oh My Gosh, No Texting While You Drive*)
- 2018/10 Distracted Driving Tips for Operators of Commercial Vehicles
- Gary Hahn has presented multiple classes to agents - 17 classes to 68 agents. Classes include: Personal auto, Homeowners/Dwelling property, Farm package policy, Agents E&O, and Commercial II.
 - Colleen Davis taught insurance related classes, including developing the Ethics in Technology presentation for November 2018 I Day
 - Colleen Davis conducted workshop, symposium and webinars
 - Matt Ward led and developed I Day and promoted the CPCU Society chapter in his company AMICA, and this was integral to Matt Ward being recruited and promoted into his new role as Customer Success Manager at CCC
 - Matt Ward volunteered at YouthBiz Young Americans Center for Financial Education. The Colorado CPCU chapter supported this group as our Charity of the month in March 2018



- Barbara Sidwell promotes CPCU designation to every GIS student meeting and activity she attends, approximately 20/year
- Barbara Sidwell promotes CPCU membership to all the professional External Relations partners she meets with from various Denver organizations, including AON, Marsh, Lockton, IMA, Zurich, Travelers, Chubb, AIG, etc. approximately 100 various interactions a year
- Mary Strain composed 1 Chaptergram in 2018:
 - June Chaptergram included message from the president, highlighted member Gary Hahn, explained Hash Oil explosion article, and article by GIS student member
- Conduct a meeting in support of diversity and inclusion during the year:
 - For our I Day Keynote address, we had Charles Johnson, 1990 CU Boulder Quarterback and National Champion MVP, and current Ball Corporation Director of Diversity and Inclusion, speak about the necessity and value of hiring, promoting, managing a diverse workforce.
 - 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 29.82%
 - Retention Rate of New Designees = 37%
 - Total Chapter Membership = 267
- Membership Conversion rate for new designees was 30%.
 - We continue to invite all new members an invitation join and attend a free chapter meeting
 - For our December social, we invited students from Risk Management and Insurance Program, and GIS members, to attend gratis. Two new RMI graduates attended, and one seeking opportunities, was connected with multiple job opportunities.
 - Two recent RMI graduates, and new 2017/2018 CPCUs, will join the board as officers beginning January 2019
 - We sponsor RMI students at each monthly meeting, average of two per meeting.
 - We honored the new designees at our I Day and their registration was at no cost.
 - We listed and congratulated New Designees on our Colorado.CPCUSociety.org website
- Membership retention rate unknown, and we appreciate National please filling these in.
 - 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 2018, transition checklist and chapter roles and responsibilities for definitions of each role 2018 to the board, to vote in new board in January 2019
 - We post job openings on our web site and announced them at monthly meetings
 - For January 2019, we will host end of 2018 Business Meeting board meeting, read mission statement and ask if all understood positions-time for questions and clarification.
 - We have had transition among Board leadership, but fortunately we had roles and qualified volunteers in place to take on new challenges. Our Pres-Elect, Matt Ward, had to step down for personal reasons, but VP Mindy O'Brien stepped seamlessly into the role of Pres-Elect, and now 2019 President. Director of Operations Mark Shrode will transition to Pres-Elect; Treasurer Colleen Davis will transition to Vice President; Membership Director Megan Salinas will transition to Director of Operations, Secretary Donna Gwidt stepped down, but longtime Retired Resource Director Jan Bailey will serve as Secretary. New CPCU and proposed board members Glenn Harris will transition to Treasurer, and JT Weinroth will become Director of Membership.
 - We will formalize position transitions at January 7, 2019 board meeting/retreat.
 - Our chapter plan is posted on our Colorado Chapter web site.
- Minimum of one chapter officer attends the Leadership Summit annually
 - In 2018, we had the President Elect, Matt Ward, attend the Leadership Summit.
 - Sue Snyder attended the Western Regional Chapter Leader Meeting in May of 2018 held in Las Vegas. This was paid for individually and not out of chapter funds.
- Chapter operating plan is defined and submitted for 2018 no later than December 31, 2018.
 - Our chapter submitted the operating plan for 2017 December 31, 2017.
- Final 2018 planning and activity reporting form is submitted to Chapter Governor and emailed to chapterservices@cpcusociety.org by 013119.
 - This will be submitted by our president elect by this date.

Additional Professional Development Given by Colorado CPCU Board Members:

Donna Gwidt 2018 Secretary Retired October 2018

Outside Business /Training activities

- Flood House – American Technologies – Feb 2018
- Envista Forensics Construction Defect – Agency Conference March 2018
- 9th Annual Denver CE/CLE Seminar – Rimkus – Wind Damage, Biomechanics, Property Appraisals, Ethics, etc. May 2018
- Hosted table for SECURA at CIIA Agency Conference – June 2018



- North American Hail Workshop, sponsored by National Science Foundation, National Center for Atmospheric Research and Insurance Institute for Business and Home Safety – Boulder CO 3 day Seminar Aug 14-16, 2018

System /IT projects

- Business Continuity Project / IT assist for SECURA – 6 month project in 2018
- Work From Home Action Committee – SECURA support for growing number of Field Associates – 8 month project in 2018
- Agency Solutions Interim Business – Agency Portal – IT/Testing of new system for SECURA from agency perspective– 6 month project in 2018
- Business Review and UAT project for Underwriters – IT/Testing of new system for SECURA from u/w perspective – 6 month project 2018

Strategic Goal #3: Engage Future Generations of Leaders

- Minimum of two events per year are held.
 - We held regular chapter meetings in January, March, May, September, and December, where RMI students were invited- option for members to sponsor a student at each meeting.
 - Two social events, Pedal Hopper and New Designee Receptions, were held and new members, designees, and CU Denver RMI students attended.
 - We transitioned to an All Volunteer Board in 2018
 - 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.
 - 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 is the External Relations Manager for the Risk Management and Insurance Program:
 - 2018 President was involved in the following activities:
 - January 4, 2018 participated in PIIAC/TCCO Emerging Leaders Forum to discuss ways to increase student and young professionals in insurance industry
 - Jan 18, 2018 – Participated in CO PRIMA meeting to encourage young professionals and students in the industry
 - January 29, lead GIS Insurance Club Advisory Meeting
 - Feb 5-6 Attended California Surplus Lines Association Annual Meeting with two RMI students
 - Feb 7 Attended CLM Networking event with two students
 - Feb 8 Attended Jake Jabs RMI Networking and Insurance Presentation to present on importance of BI Insurance; five students attended
 - Feb 15 joined CU Denver Business School and volunteered at Food Bank of the Rockies
 - Feb 15 Participated in CO PRIMA meeting to encourage young professionals and students in the industry
 - Feb 20, 2018 Participated in Rocky Mountain RMS meeting to discuss and improve mentoring options for students
 - Feb 20, 2018 Participated in TCCO/PIIAC Emerging Leaders Meeting
 - Feb 22 Attended RMRIMS Meeting with three RMI students
 - Feb 26 Advised GIS Group, who hosted five Insurance Women on Women in Insurance Business panel
 - Feb 27 Met with RMRIMS Leadership to discuss student engagement
 - Feb 28 Attended Travelers RMI Student Networking Event,
 - March 1, Prepared RMI students to present to 40 member insurance industry RMI Advisory Board
 - March 2, Attended First Friday and learned about CareerWise Colorado
 - March 5 Met with Aon Denver Leadership team to discuss hiring RMI students
 - March 6 Worked at CU Denver Business School Career Fair to promote students finding jobs in the industry
 - March 13, P&C Day at the Capital with two RMI students

- March 15, hosted Vela Insurance and W.R. Berkley Professional David Jordan, who presented on Scholarships, internships, jobs in class, as well as at dinner. Eight RMI students attended.
- March 10, Organize Spring RMI Shadow Day with 40 students and 20 companies participating
- March 22, Attended Hanover event to network with industry partners who are CPCUs, offer scholarships, internships and jobs.
- March 22, Attended RMRIMS monthly meeting with four RMI students present
- March 27, Colorado CPCU chapter partnered with Cu Denver RMI program and CU Denver Business School Daniels Fund Ethics Initiative to host Technology Disruptions in Ethics and Insurance. Many CPCUs, industry and business school partners, and students attended.
- March 30, submitted Colorado CPCU Ethics Issue application to The Institutes to compete in Innovative National Ethics Activity.
- April 2, CU Denver co partnered and hosted Travelers Disrupting Distraction presentation from Travelers Foundation at CD Denver Tivoli Center
- April 13– Organized and provided Spring 2018 Shadow day, with 23 Industry Partners and 50 RMI and business students participating
- April 24 Attended WillisTowersWatson Day of Learning at University of Denver. Met CJ Johnson, who agreed to be Colorado CPCU Society November 2018 I Day Keynote Speaker
- April 25 Attended DICE Denver Insurance Collective Experience CE Credit Presentation at Liberty Mutual Insurance.
- May 2 – Advised and attended GIS Alumni Pizza Panel
- May 8 Attended Career Leader Training in Business Career Connections office
- May 9 Attended RMRIMS presentation on CRMP certification
- May 10 Helped Host RMI Graduation Reception with IMA CEO Rob Cohen as Keynote Speaker. 21 undergraduate and 6 Graduate Students graduated,. About 100 industry partners and 40 students attended.
- May 14 – June 3 – Participated in CU Denver Global Risk Management Course, met with multiple Denver and London Industry Partners, including Lloyd’s of London, Beazley, London Market Group, Colorado Surplus Lines Association, ICAT, CRC, WTW, , Marsh, Aon, Zurich, etc.
- May 25 Diversity in the Workplace Webinar by TRINET
- June 11 Attended Global Mind Ed Program

- June 12 Met Bryan Bernier President of PIIAC
- June 13 Met with Kimsoo Evenson of Northwestern Mutual
- June 14 Volunteered at RIMS Golf Tournament
- June 21 Attended PRIMA monthly meeting
- June 27 Volunteered at CU Denver Bike to Work Day
- June 27 Attended Galvanize Info Technology Session
- June 29 Hosted RMI Alumni North End Happy Hour
- July 10 Sep 14 Attended TCCO Annual Conference and Seminar
- July 11 TCCO/Colorado CPCU Partnership Meeting
- July 13 Met with Alliance Insurance Group to discuss continuing scholarships
- July 19 PRIMA monthly meetings
- July 24 State Farm Partnership meeting
- July 26, Colorado CPCU 2nd Annual Pedal Hopper
- July 27 Premier Group Insurance Lunch Meeting
- July 31 Dean Giem Meeting Lunch
- August 1 Evolve Cyber meeting with Jonathan Sherman
- August 8 Developed and presented on Talent Recruitment to Auto-Owners Insurance Agents and Carriers
- August 21 – December 8 – Taught MGMT 1200 Introduction to Business Careers and Professional Development for class of 31 students
- September 6 Auto Owners Scholarship Check meeting
- September 7 Colorado Farm Bureau Internship Meeting
- September 17 Hosted Jerry Adugna AmFam in RISK 3809/4809 classes
- September 21 Colorado CPCU New Designee Reception at Breckenridge Brewery
- September 21 GIS Pizza Panel including ColoCPCU Pres Elect Matt Ward
- October 3 Met with CA Surplus Lines Exec. Director Ben McKay
- October 4 Met with RT Specialty HR Recruiter Chris Taggart and hosted ten students for lunch
- October 6 Attended All Colorado Business School Career Fair, Assisted BCC at Sports Authority Field
- October 9 COSIA meeting with two RMI Students
- October 10 Hosted WSIA Board Members to give presentation to RMI and GIS students
- October 12 – 16 Attended CPCU Annual Conference in San Diego CA with two GIS/RMI CPCU Scholarship winners Iris Calderon-Soto and David Adugna

- October 18 Attended COPRIMA Meeting
 - October 22 Hosted ICAT at RISJ 3809 and RISK 4809 classes
 - October 25 Supported BCC Success Summit at Business School
 - October 26 Organized Fall 2017 Shadow Day with 40 students and 21 companies who participated
 - November 2 Hosted I Day at CU South Denver Campus
 - November 9 Met HR Recruiter Michael Burnell of CCIG to discuss internships and jobs
 - November 15 Attended RMRIMS meeting with 7 RMI students
 - December 5 Presented in Entrepreneurship Financial Accounting Classes
 - December 7 Steve Schaeberle with Hanover Insurance
 - December 11 West Pac Virtus Underwriters update meeting with RMI graduate Kennedi Christensen
 - December 12 Northwestern Mutual Update meeting
 - December 13 Attended CO PRIMA Holiday Party
 - December 18 Colorado CPCU Holiday Party
 - President 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 2018 via webinars, face to face and workshops in commercial lines. Discussed involvement with CPCU and benefits at many of these events.
 - Partnered with Beta Mu chapter of Gamma Iota Sigma on a toy drive to support Children's Hospital December 2018. GIS Beta Mu acting president Social Media officer will write an article about the toy drive partnership as a highlight of his year.
 - Feb 14 Barbara Sidwell participated in CU Denver Food Bank of the Rockies volunteer event
 - Colorado CPCU Society Chapter participated in national CPCU annual conference sponsorship. Two CU Denver RMI and GIS students applied and were selected, and attended the Annual Conference in San Diego, CA.
 - 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.
 - Donna Gwidt provided the following volunteer activities:
 - Urban Peak Homeless Shelter Denver –June 2018
 - We Don't Waste – collection/packing of Food – Denver Bronco Stadium –Aug 2018
 - A Million Thanks – IICF Charitable Foundation – Writing letters to Troops – Oct 2018
 - Operation Christmas Child – Samaritans Purse – Sorting/Shipping shoebox gifts –Dec 2018
 - 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 2018 to 2019
 - Have switched from CVENT to Constant Contact for financial savings. Multiple times a year we use Constant Contact to advise our members of meetings, to provide current updates and relevant information. This occurs at least once per month.
 - Several members on our board kept our Twitter account current and tweeted relevant information and updates
 - We have an active Facebook page
 - 126 likes on our CO CPCU page
 - Jill posted 23 times on our Facebook page in 2018.
 - Posts on upcoming chapter meetings
 - Posts on photos of events
 - 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. This year, we changed with process and followed the lead of the CPCU annual conference. Instead of giving gifts to speakers, we made a financial gift in the name of the speaker to our I Day RMIIA Spirit Award Recipient, Colorado Fallen Heroes Memorial Foundation
 - President and President elect gave formal thank you at December social to board members and volunteers.
 - Thank you' s often....