

COLORADO CPCU SOCIETY CHAPTER CHARTER

The voting members of the Chapter elect the Officers and Directors. Directors and chairperson(s) must be CPCU Members in good standing in both the Society and the Chapter. They shall serve a one (1) year term in office, or until such time as their successors are duly elected, qualified and take office. The term of office shall begin on the January 1 following his or her election. The Chapter recommends two (2) years of service with some positions – one (1) year as the lead and one (1) year for transition to a new leader or as a co-lead.

The Chapter Board of Directors shall be comprised of the **President, President-Elect, Vice President, Secretary, Treasurer, Immediate Past President** and nine (9) Members-at-Large (each a “Director”) as appointed by the elected Officers and Directors.

President

The President keeps the Chapter focused on setting and meeting local and national goals. The President oversees officers and committees, and encourages future leaders. The President reports to the Chapter Governor and national office as required. Additional responsibilities of the President may include, but are not limited to:

- Direct Chapter Board and general meetings.
- Monitor progress of Chapter goals and objectives.
- Work with Chapter Governor and national headquarters to communicate members’ needs.
- Serve as a liaison between the national organization and the local Chapter.
- Network with other Chapter presidents.
- Serve as a signature person for financial accounts.
- Work with Chapter Treasurer to update Key Executives, Signatures on all financial accounts, including checking, saving, CDs, etc.
- Compose “Message from the President” article.
- Issue a “CPCU Excellence” Award to a local employer, CPCU member, CPCU Instructor or volunteer leader. Partner with the Director of Communication to publicize.
- Send one or more Chapter leaders to the Leadership Summit.
- Conduct an annual Chapter planning session to establish goals and objectives for the upcoming year consistent with the Society’s strategic plan. Consider inviting the Chapter Governor to this.



- Represent the CPCU Chapter on the RMIIA Board or assign a representative from a member company.

President-Elect

The President-Elect supports the Chapter President as needed. Responsibilities may include, but are not limited to:

- Performs President's responsibilities when the President cannot be available.
- The main responsibility of the President-Elect is to Chair the annual All Industry (I-Day) committee to plan and execute the I-Day event.
- Attend the Leadership Summit for Chapter training.
- Serve as a signature person for financial accounts.
- Other responsibilities as assigned by the Board.

Vice President

The Vice-President supports the President-Elect as needed. Responsibilities may include, but are not limited to:

- Assist with the Circle of Excellence report.
- Liaison to Chapter committees.
- Co-chair I-Day Committee.

Secretary

The Secretary attends all meetings of the Chapter and Board of Directors. The Secretary is responsible for scripting a permanent record of all meetings. Responsibilities may include, but are not limited to:

- Attend all Chapter meetings.
- Script meeting minutes.
- Submit minutes for approval by the Board prior to publishing on website.
- Send approved minutes to Director of Communication to be published as a permanent record on the Chapter website.
- Inform the Society of new officers and chairs.

Treasurer

The Treasurer serves as the chief financial officer for the Chapter. The treasurer oversees the management and reporting of the Chapter's finances. Additional responsibilities may include, but are not limited to:

- Maintaining revenue and expenses via QuickBooks and/or Excel.
- Keeping the board regularly informed of key financial events, trends, concerns, and assessment of fiscal health in addition to completing financial reporting.
- Work with the Chapter Board of Directors to establish the annual budget as well as comparing the actual revenues and expenses incurred against the budget.
- Consistently and accurately define revenue and expenses, so board is aware of where funds are going.
- Pay bills/donations as requested and/or received, with the approval of President and/or President-Elect, and Officers.
- Manage cash in accordance with Chapter procedures. This includes depositing dues and other revenues.
- Manage and prepare checks for all Colorado CPCU Society educational offerings by independently contracted instructors. If Treasurer is an instructor, will prepare own check, but provide check with background materials to be signed by President and/or President-Elect.
- Check PO Box for incoming bills or payments.
- Facilitate annual tax filing.
- Maintain bank card and checks as appropriate.
- Meet with the outgoing Chapter Treasurer to review all financial records.
- Submit scholarship checks to appropriate academic institution.
- Participate in annual or bi-annual audit.

Immediate Past President

The Immediate Past President serves as support for the President. They are there to lend a hand and give advice when needed. They have experienced most Board roles, so they are a great resource to have. Responsibilities may include, but are not limited to:

- Facilitate Chapter's relationship with its Champions.
- Promote within the Chapter newly required (2020) Continuing Education for CPCUs program, to take the place of existing Continuing Professional Development (CPD).

- Complete and submit the Circle of Excellence Recognition Program documents. This includes everything from the Chapter's COE plan to the final Chapter COE submission to the Society. The Immediate Past-President is responsible for getting all updates/activities from the Board Member(s) and Chairperson(s) to help compile the final COE report.
- Encourage members to volunteer for Chapter service.

Director of Membership

The Director of Membership is responsible for developing a program to retain members and to welcome new members and new designees in the CPCU Society and foster active membership within the local Chapter. Members are the lifeblood of our Chapter. Work to convert new designees into paying new members. The Director of Membership may form a Membership Committee to assist in any and all responsibilities that may include, but are not limited to:

- Maintain the Chapter roster and report membership trends to the Board.
- Assists Board in maintaining active participation of members, suggest creative ways to encourage member involvement, and track membership participation in Chapter programs and events.
- As with all members, emphasizes the value of the Society membership to Chapter members on an ongoing basis.
- Conducts annual unpaid member contact campaign to be completed by April following the Society's fall dues notice mailing to urge members to renew their membership. The campaign consists of 3 touch points: email, call-outs, and in-person if possible. May lean on other board members and Champions to help in this campaign.
- Contacts non-member CPCUs in the Chapter area (lapsed member outreach). Such contacts may consist of asking why they are not a member and seeing what can be done to convert them to membership.
- Welcomes CPCUs transferring into the Chapter area.
- Urges members to keep their contact information up to date with the Society.
- Send thank you notes to employers to recognize their support of Chapter activities.
- Compile list of activities throughout the year for the President-Elect for COE.
- Maintain a roster of new designees and welcome them throughout the year as they complete their CPCU program.
- With Director of Education, pull reports at the end of each testing period, so new designees can be recognized as they complete their designation.

- Work with the President to get a handwritten note out to both the new designee and their company's leader congratulating them and thanking their leader for the support they have given their employee in their journey.
- Make contact with your new designees and involve them in the Chapter.
- Promote benefits of the Society and Chapter membership such as continuing education, professionalism, and networking.
- Coordinate with Webmaster to recognize new designees on the Chapter website.
- Distribute information and serve as a contact point for questions from new designees.
- Encourage new designees to attend meetings and become active members of the Chapter. Personally invite them to the monthly meetings. Their first meeting is FREE.
- Recruit new designees for Chapter committees.
- Recognize new designees with a new designee social to be held at least 1 month before the Annual Meeting for members to meet and acknowledge the future of our local Chapter.
- Work with the All Industry (I-Day) committee on the new designee conferment. This includes ordering new designee gifts, personally inviting new designees to the conferment, and promoting the new designee meet and greet.
- Help facilitate the New Designee Recruitment and Retention Challenge to get new designees to become members.
- Get new designees involved in the Chapter early. May include assigning a project such as how to get newer CPCUs involved in the Chapter, etc.
- Write member Spotlights to include in quarterly newsletters.
- Work with Webmaster to display relevant recognitions on Chapter website.
- Welcome new students as they begin their CPCU studies and offer them support from the Chapter.
- Initiate programs to reach out to prospective candidates.
- Give students a goal to reach such as the Hawaii Conferment, or another location.
- Contact candidates close to completion to encourage them to complete their designation.
- Encourage Chapter members to make a commitment to recruit and mentor CPCU candidates.
- Promote the Society's Candidate membership.
- Compile list of activities throughout the year for the President-Elect for COE.

Director of Education

The Director of Education is responsible for promoting and publishing available student scholarships. The Director of Education may form a committee to assist in any and all responsibilities that may include, but are not limited to:

- Coordinate Society educational seminars for local member benefit. Partners with the Director of Operations to plan/present education seminars during monthly/bimonthly meetings; One being Ethics in March and another Property (both license requirements).
- Promote student scholarships.
- Make scholarship applications available on the Chapter's website; work with Chapter Webmaster to post.
- Compile scholarship applicants and present to the Board for a final decision on scholarship recipient.
- Obtaining a biography from scholarship recipients to promote to the local Chapter.
- Liaison between the Chapter and the CU Denver RMI and other education programs.
- Serving as a liaison between members that are active in programs such as Junior Achievement and the Chapter. Compile information and present to the President-Elect for the COE program.
- Encourage continuing education and recommend the appropriate Institute classes to assist individuals in furthering their careers.
- Analyze financial and membership value and suggest specific CPCU courses to offer in spring or fall.
- Monitor past class pass ratios used for instructor bonuses and program success.
- Locate facilities and instructors for each proposed class.
- Work with Treasurer to prepare Course Leader Agreements and acquire W-9s.
- Maintain up to date instructor contact information.
- Monitor and update the registration program and also keep instructors up to date on class size and rosters.
- Convey to CPCU course instructors that it is their responsibility to communicate with enrolled students about student questions, payments, study guides, etc.
- Review registration questions and use results for future class offerings.
- Prepare and send class surveys to all students for each class, each semester.
- Review survey results, and create survey summary to share with Instructors.
- Report activities/results to the President-Elect for COE.

Director of Operations

The Director of Operations handles all aspects of monthly meetings. The Director of Operations may form a committee to assist in any and all responsibilities that may include, but are not limited to:

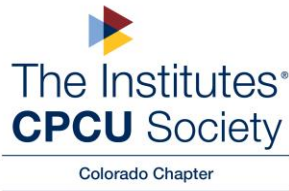
- Schedule Chapter meetings and arrange for speakers. This includes obtain biographies, lunch choices, A/V equipment needs, work to obtain CE credits, monthly meetings should coordinate with COE requirements so the speaker topics accomplish our Chapter goals.
- Upload Continuing Education for CPCUs credits to the Society on behalf of the Chapter's members within 24 hours of educational event.
- Introduce speakers at the meeting, as well as do prize drawings.
- Work with meeting venue on food selections, RSVP, contracts, etc. Update venue at the meeting with color coding key for menu selections and walk-in count.
- Purchase door prizes and speaker gifts.
- In charge of bringing baskets for drawings, pens, meal cards, portable screen, handouts, and projector to meetings.
- Provide Treasurer with bill copies, as well as details for the charity of the month.
- Conduct an Ethics Awareness Month meeting/activity.
- Schedule and arrange for a variety of educational seminars.
- Work with Director of Education to request and file for continuing education (CE) credits.
- Maintain monthly meeting schedule/save the date document and give to Webmaster and social media chair for publishing.
- Promote "Each one Reach One" to get lapsed or candidate members to become members.
- Provide ice breaker activities for meetings (networking bingo, etc.).
- Provide meeting details to the person sending out the meeting invites (Chapter Administrator) and Webmaster, including speaker topic description, speaker bio, food choices, CE availability, and pricing if there is extended meeting hours.
- Explore promotional ideas each quarter such as "Spread the Word", "Each One Reach One", volunteering, etc.
- Set up the monthly meeting organization to donate to at the monthly meetings. May partner with Good Works projects for some meetings.

- Provide monthly meeting summary to president-elect for COE.

Director of Communication, Public Relations, and Good Works

This multi-faced role creates awareness with local CPCUs, the Society, and the public of what the Chapter is doing. The Director of Communication, Public Relations, and Good Works promotes recognition of the CPCU Society, its members, the designation, and the local Chapter. This role helps promote a sense of good will among the membership. This role may form a committee to assist in any and all responsibilities that may include, but are not limited to:

- Promote the Good Works projects and other news-worthy events the Chapter does in the public eye. This may include sending articles to the Society or producing press releases for local news networks.
- Coordinate and produce Chapter newsletters. Work with the Webmaster to upload the newsletter to the website, as well as email it out via Constant Contact. This can be done in conjunction with help from others.
- Submit relevant articles to the Society for potential national exposure.
- Work with the I-Day Chairs to submit press releases, contact business journals, etc., to get the I-Day date, time, and description out to all insurance professionals in a timely manner.
- Create volunteer and networking opportunities for Chapter members.
- Social activities help promote a sense of belonging and camaraderie within the Chapter.
- Responsible for the planning and implementation of a Good Works project each year.
- Coordinate with Director of Operations and membership to plan and implement social events.
- Promote the Chapter's Good Works projects and Socials in newsletter articles and on the Chapter website. Consider sending an article to the Society to promote what the local Chapter is doing.
- Involve candidates, new designees, students, and members, such as GIS Toys for Tots.
- May partner with other committee chairs to do specific Good Works or social projects like a new designee Good Works project, etc.
- May partner with other organizations to work on a project/social.
- Consider using ice breakers before events to help people get to know each other better.
- Conduct networking events with other organizations like RMIIA, RIMS, Insurance Women, Denver Young Professionals, and/or Agent Associations.
- With other CPCU members, represent CPCU at the Day at the Capitol.



- Work with the Webmaster and Social Media chair to promote/publish announcements.
- Keep track of activities, attendance, etc., for the President-Elect for COE.

Webmaster and Social Media Chair

The Webmaster/Social Media Chair is responsible for coordinating and keeping the Chapter's website current, as well as promoting the CPCU Chapter to its members and the public via website and social media, including Facebook, LinkedIn, Twitter, and the Institutes Community page. The Webmaster may form a committee to assist in any and all responsibilities that may include, but are not limited to:

- Maintain the Chapter's website with up-to-date information.
- Serve as a liaison to the Society on guidelines for our website.
- Establish procedures to coordinate with Chapter Board on posting information.
- Research and make recommendations on links to other organizations' websites.
- Publicize Chapter meetings and programs, special events, new designees, and Good Works programs via the website.
- Publish member spotlights to educate members at meetings on what people do or have done. This doesn't necessarily have to be a Board member.
- Promote the Society's interest groups and our local Chapter interest group members.
- Promote Continuing Professional Development and the Continuing Education for CPCUs Program.
- Promote our member's "Spread the Word" activities.
- Publish new designees for last 2 years, Officers and Directors, etc.
- Work with other chairperson(s) to obtain updated information to post.
- Utilize administrator user privileges to get Chapter reports from the Society.
- Promote recognition of the CPCU Society, its members, Facebook, LinkedIn, Twitter, and the Institutes Community page.
- Foster membership in our Chapter sites. This may include inviting members to like us or become a friend/connection, etc.
- Encourage members to share their successes with getting their CPCU designation and other "Spread the Word" activities.
- Promote our Good Works, charity donations, etc.

All Industry Day (I-Day) Chair(s)

The All Industry or I-Day Chair(s) are responsible for planning and executing I-Day. The I-Day Chair(s) will execute I-Day with the help of committees. Responsibilities may include, but are not limited to:

- Find the venue and sign the event contract.
- Select the menu.
- Create the agenda, which includes coming up with interesting topics and finding session speakers.
- Partner with local insurance organizations to promote attendance and also sponsor an exhibit booth.
- Partner with RMIIA for the annual Hero Award.
- Work with the Society to get a liaison for the local conferment.
- Solicit vendors for sponsorship, participating in our vendor visitation room, and prizes.
- Send the event invitations out in a timely manner (provide information to Chapter Administrator and Webmaster).
- Make sure the event is well publicized through press releases, industry calendars, business journals, etc.
- Keep the Vice President informed of progress.
- File Continuing Education credits.
- Work with the Director of Membership to invite new designees for the conferment and meet and greet session.
- Keep the Treasurer up to date with detailed descriptions of revenues and expenses. This also includes an update on where you are to the budget.
- Create programs to hand out to attendees with the I-Day agenda.
- Invite The Institutes to see if they want some type of representation with a booth.
- Send out a survey of attendees and compile results for the COE report.

Senior Resource Liaison

The Senior Resource Liaison brings the needs and desires of retirees (and pre-retirees) to the Chapter leaders and encourages retiree involvement within the Chapter. The Senior Resource Liaison may form a Committee to assist in any and all responsibilities that may include, but are not limited to:

- Promote the Retirement Resources Interest Group.

- Involve retired members as mentors. May partner with other Directors, chairpersons and committees.
- Recognize retirees for interesting things they are doing.
- Create and maintain retirees section in the newsletter.
- Find ways for retirees to meet and network. It may be just getting together after or before a meeting for coffee, book club, etc.
- Report activities to the President-Elect for COE.

Chapter Historian

The Chapter Historian is responsible for reviewing historical documents and making them available to members. Responsibilities may include, but are not limited to:

- Maintaining proper storage of historical documents/items.
- Providing historical documents to the Website Director to be published for members to reference.
- Being the point of contact for historical questions on the Chapter.
- Archiving and cataloging documents, so the Chapter knows what we have and what is being stored.
- Go through historical documents and decide what needs to be kept, scan them for an electronic copy to keep on the website and store them physically in an orderly manner in our storage unit. Decide which documents should be private and which should be available to all members.

Chapter Administrator

The Chapter Administrator is responsible for developing Chapter event invitations, and tracking responses, via the email marketing system (currently Constant Contact). Chapter Administrator works closely with Chapter Board and Director of Operations to publicize events via directed email invitations. Responsibilities may include, but are not limited to:

- Develop and maintain the Constant Contact invitation system.
- Work with Board to develop surveys to send out to Chapter membership and track membership engagement.
- Work in coordination with Webmaster to list important information on website and for membership mailings.