



Iowa Chapter

Officers, Directors, and Committee Chairs
Job Descriptions and Responsibilities

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Table of Contents

| | |
|---|----|
| General Duties of All Positions | 3 |
| Officers | 3 |
| Chapter President | 3 |
| Vice President | 3 |
| Secretary | 4 |
| Treasurer | 4 |
| Immediate Past President | 5 |
| Directors and Committees..... | 5 |
| Director of Member Activities..... | 5 |
| New Designee Representative | 5 |
| Candidate Development..... | 6 |
| Membership/Member Involvement | 6 |
| Golf Event..... | 6 |
| Good Works | 6 |
| Director of Internal Operations..... | 6 |
| Past Presidents' Club | 7 |
| Industry Visibility | 7 |
| Champions Coordinator | 7 |
| Diversity Chair..... | 7 |
| Historian..... | 7 |
| Director of Communications..... | 8 |
| ChapterGram Editor..... | 8 |
| Public Relations | 8 |
| Website Development..... | 8 |
| Photographer | 8 |
| Social Media | 9 |
| Virtual Media Coordinator..... | 9 |
| Director of Professional Development..... | 9 |
| Ethics..... | 9 |
| Engaging Future Leaders Chair / Scholarships..... | 9 |
| Iowa Insurance Hall of Fame | 10 |

Note: For ease of reading, the word “chapter” is used throughout this document to reflect the Iowa CPCU Society Chapter and “Society” is used to reflect the national CPCU Society.

General Duties of All Positions

- Participate in chapter board meetings.
- Cross-train incoming board members who will fill a vacated position.
- Safeguard the chapter's financial resources.
- Recruit future board members by being a Champion of the CPCU designation.

Officers

Chapter President

The chapter President keeps the chapter focused on establishing and meeting chapter and Society goals and provides guidance to officers, directors, and other board members. The President reports to the Society office and its representatives as required.

- Submits list of incoming officers, directors, and select board members to Society on the prescribed template.
- Completes and submits the Circle of Excellence (COE) strategic plan for the year, which is due January 31. Continually monitors progress toward COE objectives and redirects board as needed.
- Schedules and sends agendas prior to each chapter board meeting.
- Authors the president's message in the monthly ChapterGram by the date prescribed by the ChapterGram editor.
- Updates chapter job descriptions document based on changes in roles and responsibilities.
- Participates in nominating committee aimed at identifying new chapter officers and directors.
- Participates in I-Day activities as directed by Vice President.
- Serves as liaison between the chapter and Society.
- Attends, or selects a delegate, to represent the chapter at the Society Annual Meeting, including the hosting of a chapter new designee event.

Vice President

The Vice President assists the chapter president with duties as assigned and oversees the programs for the chapter year. The Vice President initiates the annual updating of the chapter's strategic plan, including establishing objectives for his or her term as President.

Prior to Term as President

- Contacts all board members and determines interest in continuing to serve on the board in the upcoming year. Recruits new board members for open board positions. Makes changes to board structure, as necessary, to accomplish key goals.
- Participates in nominating committee aimed at identifying new chapter officers and directors.
- Communicates key board positions to Society, as requested in late December / early January.
- Develops the Circle of Excellence strategic plan for the upcoming year, which is due January 31.

During Vice President Term

- Plans and executes the technical meetings for the chapter, either independently or using a planning committee. Key to this responsibility includes securing a speaker, venue, food, necessary A/V, speaker gifts, room setup on the day of the meeting, registration forms, nametags, thank you emails, etc.
- Plans and executes an I-Day event in November, including the same key components as the chapter meetings. In addition, works with Industry Visibility Chair to:
 - Secure location and sponsor of speakers' dinner.
 - Secure breakfast sponsors.
 - Schedule and visit local employers during Connections Visits.
- Communicates all events and details to the ChapterGram editor, website administrator, and social media chair for marketing.
- Governs chapter board meetings in the absence of the president.
- Brings the monthly meeting kit to all chapter meetings for meeting setup (nametags, banners, check-in, etc.)

Secretary

Prior to Term as Vice President

- Determines meeting plan for upcoming year. Recruits members for planning committee, as applicable.
- Determines date for I-Day and begins seeking locations (large venues tend to fill up a year in advance).
- Contacts incoming Society President or local Governor to request presence at following year's I-Day conferment.

During Secretary Term

- Captures the discussion of chapter board meetings and distributes meeting minutes to all board members following the meeting.
- Receives automatic email forwards from iowacpcusociety@gmail.com and answers directly, or forwards to the appropriate board member for follow-up.
- Meets with accounting firm to complete tax return for financials of the previous year (as the Secretary was the Treasurer during that year).
- Assists the Treasurer with financial matters, as requested. Serves as a secondary signer on accounts and maintains a key to the lock box.
- Responsible for checking the chapter mailbox at The UPS Store, 2800 University Ave, West Des Moines, IA 50266 and maintaining mailbox keys

Treasurer

The Treasurer serves as chief financial officer for the chapter, overseeing income and expenses, providing monthly financial statements, and monitoring the budget.

Prior to Treasurer Term

- Works with current Treasurer to develop budget for the upcoming year and proposes to board for discussion and vote. Makes changes as needed and enters budget into accounting software.
- Works with current Treasurer to update signing privileges with our financial partners.

During Treasurer Term

- Serves as primary contact for all financial matters of the chapter, including banking, EventBrite, and other relationships.
- Keeps an accurate record of all income and expense transactions for the chapter, including the proper categorization of each item on the budget.
- Prepares monthly financial reports for board members and distributes via email. Draws attention to any specific items worthy of added attention (higher expenses, lower income, etc.)
- Attends National Leadership Summit on behalf of chapter for officer training. Assists Secretary with first contact for incoming Society President and invitation to Iowa I-Day. Reports key findings of Leadership Summit to board members and authors ChapterGram article, if possible.

Immediate Past President

The Immediate Past President serves as an advisor to the chapter President, chairs the nominating committee for future officers, and conducts special projects as requested.

- Sends completed Circle of Excellence submission to Society, summarizing events of Presidential term.
- Serves as chair of nominating committee to identify future officer and director candidates.
- Conducts special projects to benefit the chapter at the request of the President.
- Provides advice and counsel as needed to chapter officers and directors.

Directors and Committees

Director of Member Activities

The Director of Member Activities monitors general activities for potential, new, and current chapter members. These activities include developing new candidates for the CPCU designation, providing a welcoming environment for new designees, organizing our annual golf outing, and fostering interaction of current membership.

New Designee Chair

- Sends congratulatory emails to new designees on behalf of the chapter.
- Adds new designees to the ChapterGram email recipient list in Constant Contact each quarter.
- Recruits new designees to author articles for monthly ChapterGram.
- Organizes annual new designee reception to be held during the July – August timeframe.
- Works with Vice President, as requested, on local I-Day conferment ceremony.

- Distributes information and serves as contact person for questions from new designees.
- Develops and facilitates other activities to integrate new designees into the activities of the chapter, encouraging new designees to attend meetings and get involved.

Candidate Development

- Using Society-provided lists, contacts local CPCU candidates to inform them of the opportunity to join the Society and chapter as a candidate member upon completion of their second exam.
- Implements and maintains a list of local mentors willing to assist and motivate candidates during the completion of their CPCU designation.
- Offers candidates information on mentoring opportunities both locally and nationally.
- Assists the new designee chair with the planning and execution of the local new designee reception.

Membership/Member Involvement

- Actively welcomes members at chapter events and encourages networking.
- Develops new strategies to enhance member involvement in the activities of the chapter.
- Plans several social events each year to encourage involvement, especially for those members who are unable to participate in chapter events during regular business hours.
- Assist the Golf Event committee in planning and execution of a successful event.

Golf Event

- Organizes, either independently or with co-chairs/team, an annual golf outing designed to raise funds for a designated charity, including:
 - Works with the officers and directors to identify the charity that will receive proceeds.
 - Promotes and publicizes the golf event.
 - Solicits hole sponsors and prizes and plans for corresponding sponsor signs.
 - Coordinates registration and runs the event and any follow-up activities.

Good Works

- Identifies charitable activities and organizations with whom the chapter may partner to provide community outreach.
- Provides information about upcoming Good Works events and the results of past events to the ChapterGram editor and social media chair.
- Coordinates “day of” activities including meeting locations, special instructions, etc.

Director of Internal Operations

The Director of Internal Operations monitors activities related to the efficient operation of the chapter, including Industry Visibility, Past Presidents’ Club, and Historian activities. This Director is also responsible for advising the officers regarding ways to streamline chapter operations that result in greater ease of business, reduced expenses, and other desired goals.

Past Presidents' Club

- Serves as a liaison between past presidents of the chapter and the current board.
- Organizes at least one meeting each year between past presidents of the chapter and current chapter officers to discuss ideas and suggestions for further progress of the chapter.
- Recommends candidates for the Burkhalter Award, based on feedback from past presidents and others in the local insurance community.

Industry Visibility

- Maintains relationships with other industry organizations such as the Insurance Association of Greater Des Moines (IAGDM), Iowa Insurance Hall of Fame, and Independent Insurance Agents of Iowa.
- Works with the Director of Communications and Public Relations Chair on the I-Day ad and co-op advertising.
- Assists the officers and directors in developing innovative ideas to promote the chapter.
- Assists the nominating committee with identification and coaching of future chapter leaders.

Champions Coordinator

- Develops and implements a local CPCU Champions program, building on the framework of the Society Champions program.
- Holds an annual Champions breakfast or other event to gather Champions, share company-specific best practices and communication methods, and similar initiatives.
- Provides board members with an annual summary of the Champions program, desired improvements, and other ideas.

Diversity Chair

- Encourages diversity and inclusion within the chapter, through actions such as:
 - Organizes an annual diversity and inclusion event (chapter meeting, specific event)
 - Actively recruits a diverse group of CPCUs to serve on the chapter board

Historian

- Keeps a record of Iowa Chapter past presidents.
- Obtains biographical information and photos from the current chapter president and adds to the record of past presidents.
- Maintains an archive of memorabilia (including photos, newspaper articles, and magazine articles) regarding the activities of the chapter.

Director of Communications

The Director of Communications oversees activities of the chapter related to communication with chapter members and outside entities. Responsibilities of this position include:

- Maintains the chapter's overall communications plan.
- Oversees the chapter's web presence, including the chapter website and social media sites.
- Oversees published media, including the New Designee ad, ChapterGram, and photographs at chapter events.

ChapterGram Editor

- Solicits information and photos that can be included in the monthly ChapterGram.
- Composes the ChapterGram using the Constant Contact service.
- Forwards ChapterGram to officers and directors for their review prior to publication.
- Schedules ChapterGram for publishing and email delivery.

Public Relations

- Implements strategies to promote the chapter, its activities, and the CPCU designation.
- Coordinates annual I-Day ad in the DM Register to recognize our new designees, which includes obtaining photos from new designees by a prescribed deadline.
- Creates a kiosk-style PowerPoint program including all new designees to be shown at the I-Day event.
- Organizes and executes, either independently or creating a committee, a plan to solicit contributions for the annual I-Day advertisement.
- Issues press releases and submits articles/photos to the Society, as applicable.

Website Development

- Maintains and improves the Iowa Chapter website, such as:
 - Chapter events and registration
 - Board member listing
 - History, bylaws, and other related information.
 - Link to monthly ChapterGrams

Photographer

- Takes pictures at Iowa chapter events (the most critical being I-Day) and forwards photos to the ChapterGram editor, webmaster, social media chair, and/or Public Relations chair for publishing in the ChapterGram, chapter website, social media platforms, or other Society/chapter publications.
- Locates a paid photographer to take professional-level photos at I-Day event if adequate equipment is not owned by the photographer.

Social Media

- Monitors changes to the social media environment and recommends to chapter officers new social media platforms, changes to content preferences of social media users, and other critical changes necessary to maintain a positive social media presence for the chapter.
- Manages access to social media sites by working with others in the chapter with access to coordinate posting efforts.
- Posts President's Message/ChapterGram, meeting photos, and other relevant and interesting content to chapter social media platforms.
- Begins new discussions and monitors current discussions on chapter LinkedIn group.

Virtual Media Coordinator

- Maintains administrator credentials and coordinates chapter communication and engagement on the Iowa Chapter INteract online community platform.
- Maintains administrator credentials for the chapter Zoom account and sets up virtual meeting access as requested by chapter board members.

Director of Professional Development

The Director of Professional Development oversees activities of the chapter which relate to education and professional development of the membership. This can include hosting a Professional Development event or workshop during the year. Coordinates with chapter Vice President for any events planned throughout the year.

Ethics

Develops activities pertaining to adherence to the CPCU designation ethical standards. In conjunction with the Vice President, organizes one ethics event during the calendar year (typically during March).

Engaging Future Leaders Chair / Scholarships

- Maintains contacts at local high schools and universities (particularly those with Gamma Iota Sigma chapters) to encourage students to pursue careers in insurance and bring awareness to the value of the CPCU designation.
- Assists the Candidate Development chair with the chapter's mentoring program.
- Chairs the chapter's scholarship activities, including:
 - Develops new ways to promote the scholarship program to potential applicants.
 - Requests the ChapterGram editor to include scholarship advertisements in the ChapterGram each January, February, and March.
 - Reviews all applications and chairs the process of selecting the scholarship recipient.
 - Notifies scholarship recipient of the decision and thanks all other applicants for their interest.
 - Request disbursement of the scholarship funds from the Treasurer, directed to the recipient's university.

Iowa Insurance Hall of Fame

- Serves as the liaison between the chapter to the Iowa Insurance Hall of Fame.
- Serves on the new inductee selection committee of the Iowa Insurance Hall of Fame.
- Brings all donation requests from the Hall of Fame to the chapter board.
- Attends the annual induction ceremony and banquet and welcomes chapter guests in attendance.
- Work with chapter members to identify and help them nominate prospects to the Iowa Insurance Hall of Fame for future consideration.