

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

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

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

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

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

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

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

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

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

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

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

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

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