



CPCU Society

Chapter Best Practices

Guide

“A best practice is defined as a superior method or an innovative practice that contributes to improved process performance. The practice must demonstrate that it is ‘better, faster, or cheaper.’ Additionally, a practice, method, or process may be deemed a best practice when it produces superior results, is clearly a new or innovative use of manpower or technology, when it has received an external award for this practice, or when it leads to exceptional performance.”

- *Anonymous Internet Resource*

4th Edition

Chapter Best Practices Guide

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Introduction

Best Practices outline key activities to help chapters achieve optimum performance to best serve their members. A best practice is defined as "a superior or innovative method that contributes to improved process performance." While the term "best practices" is used, there really is no "best" way to run your chapter. Every chapter must evaluate the needs and desires of its own members; you as chapter leaders must determine which practices make sense for those members.

Remember that the CPCU Society leadership (board, governors, etc.) and the CPCU Society staff are always available to help your chapter with its needs.

Five Reasons Why Members Get Involved

Cynthia D'Amour, author of *How to Turn Generation Me into Active Members of Your Chapter*, led a brainstorming session with all chapter officers at the CPCU Society's National Leadership Institute. The group determined five major reasons that members are likely to become involved in chapter activities. Because different people may respond to these five areas of interest, you might want to schedule a variety of activities throughout the year to bring in the greatest number of members. Be sure to target your activities accordingly in your newsletter and meeting or event announcements.

Here is a list of ideas to generate member involvement and attendance in the five key areas

1. Personal and Professional Development

Many individuals are motivated to attend meetings that will help them develop or enhance their professional and personal skills. They will be attracted to the following types of programs:

- leadership, negotiation, planning, team building, time management, and sales
- personal finance
- résumé writing
- interviewing techniques
- coaching and mentoring
- behavior modification
- joint meetings with other professional groups, such as RIMS or IIAA
- programs approved for continuing education credits

2. Community Service

Some individuals are interested in contributing to the betterment of the local community. Community service activities that would draw these people to your chapter include:

- Provide relief for foster parents or child sitting.
- Participate in fundraising.
- Repair houses.
- Organize food drives.
- Explain insurance to the public (which is relevant and easy for volunteers).
- Adopt a school by providing supplies.

- Serve at a soup kitchen.
- Provide scholarships to local colleges.
- Help senior citizens with yard work or shopping trips.
- Participate at school safety days.
- Coordinate new Community Good Works projects.

3. Professional Camaraderie

People who enjoy belonging to a group often seek membership in professional organizations. They derive pleasure from knowing members of the group and following their accomplishments. Recognition is important to them as well. The following types of activities will attract them:

- Read member-of-the-month profiles.
- Help new designees learn about chapter benefits.
- Be designated greeters for chapter events.
- Feature members' names in print.
- Compile member directories or create a web site with pictures.
- Use business cards in badge card holders.
- Coordinate mocktail parties at high schools.
- Attend socials.

4. Personal Contact

Some potential members will look for activities where they can demonstrate caring, celebration, and compassion to their fellow professionals. Activities that will be attractive and encourage their involvement include:

- Write letters and call people to attend meetings/functions.
- Send thank-you and recognition letters.
- Create phone trees.
- Break up the leadership clique and involve all members.
- Send birthday, sympathy, or get-well cards.
- Recognize employer support.
- Invite candidates to chapter activities.
- Contact missing members.
- Make donations on behalf of the chapter in the event of death in a member's family.
- Host a new designee lunch.
- Send flowers or other token of recognition to new designees.

5. Fun

Many individuals are drawn to entertaining activities within the chapter. Some recommendations include:

- Create a board position for social chairman or a social committee.
 - Conduct group activities such as sports outings and parties.
 - Use questionnaires to break the ice at events.
 - Play insurance trivia games (with door prizes).
 - Host a golf outing and dinner.
- Include spouse or family in certain events.
 - Invite politicians to speak.
 - Hold a casino night.
 - Co-host holiday parties with other groups.
 - Roast the outgoing president.
 - Have a scavenger hunt.
 - Give away door prizes at a luncheon or dinner.
 - Host a bowling tournament.
 - Go on a hayride.

Quiz: Is Your Chapter Volunteer- Friendly?

by Leadership Coach
Cynthia D'Amour

You need volunteers. Your members are busy people. To volunteer for you means members must make you a priority over other choices—sometimes including family.

Are you worthy of this priority? Do you really serve your volunteers? Is your association volunteer-friendly? Step into the shoes of one of your volunteers and explore the answers to the following questions.

- 1. Can a member get involved with your chapter as a volunteer today?**
Annual volunteer round-ups are not enough. Members' calendars open up for potential volunteering throughout the year. You need to be ready to help volunteers in your chapter when time shows up—otherwise, other groups will be glad to take that time.
- 2. Do your members know what to do if they want to get involved today?**
Who do they contact? What do they do? Most importantly, how do members know this? Do you have a volunteer hotline? Do you regularly promote volunteer opportunities so members think of you when the urge to get involved strikes?
- 3. Do your leaders like their volunteers?**
Do your leaders view volunteers as valuable chapter resources or as another pain to be managed? Is there an “us versus them” mentality in your office?
Even if nothing bad is said, your members will sense when they are viewed as an inconvenience.
If you're not sure about your leaders' views, ask some newer members for feedback about their attempts and experiences of being involved in your chapter.
- 4. Do you offer volunteer opportunities in a variety of shapes and sizes to meet your members' needs?**
Members want opportunities that go beyond traditional long-term committees. How can your members volunteer for just one day? Through e-mail? In a virtual setting? In their home? In local groups? In the middle of the night or early morning?
Developing a diverse membership requires diversity in your volunteer opportunities.
- 5. Do you give volunteers good notice?**
Volunteer duties need to be planned so members can work them into their schedules with ease. Determine meeting dates in advance. Send out background information to be read at their leisure.
Avoid forcing members to be in crisis mode in order to be involved with you.
- 6. Is your volunteer work meaningful?**
Do your volunteers feel proud about what they have accomplished at the end of their meetings? Have they made progress? Given important input? Did it matter that individuals showed up?
There's nothing worse for members than making time in a busy schedule for volunteering, and discovering it's a complete waste of time for them to be there.
Committee and task force meetings with significant drops in attendance are often experiencing this problem.
Not only is the volunteers' time lost, he or she will likely tell other members about the bad experience, and, thus, impact your future volunteer recruitment efforts.
- 7. Is it fun to volunteer for your chapter?**
Do members feel good about volunteering for you? Do they leave with a smile on their face, or at least feel glad that they were part of the picture?
If volunteering is not fun in some way, it becomes work. We all have too much work to do these days—and few have too much fun.
Creating volunteer work that is both meaningful and fun is the cutting-edge strategy for making your chapter volunteer-friendly—and filled with active volunteers.

Make the questions above that you answered “no” to a strategic priority for your board this year—and watch your volunteer numbers soar.

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Chapter Activities

Here are some ideas for best practices concerning various aspects of your chapter organization and activities.

Circle of Excellence Recognition Program

The Circle of Excellence criteria are an important part of chapter operations because they provide officers and committee chairmen with guidance and goals. The CPCU Society looks forward to recognizing your chapter for its hard work.

Check Your Chapter's Progress

- Start early! Many chapters use the criteria as a planning tool in the beginning of the year.
- Get help! Assign volunteers or a task force to each suggested activity.
- Don't wait until the last minute to work on the submission.
- Download the electronic reporting template from the CPCU Society web site.
- Review each criterion and fill in the information as you complete it.
- Keep answers concise and simple.
- Plan to send your submission electronically. Use the template provided by national.
- Be sure to send your submission by June 1!

Mail or e-mail your chapter's submission by June 1 to:

Chapter Services
CPCU Society
720 Providence Road
Malvern, PA 19355
e-mail: chapter.services@cpcusociety.org

Community Good Works

Many chapters provide volunteer services to the local community. These Community Good Works projects help promote a sense of good will among the membership.

Assign Responsibility

- Appoint a chairman or co-chairmen for a separate committee to handle all Community Good Works projects.
- Involve candidates in Community Good Works projects.
- Assign new designees a Community Good Works endeavor as a class project.
- Partner with other organizations (RIMS, NAIW, agents, associations, etc.) to work on a project.
- Consider partnering with one or more employers.

Successful Community Good Works Projects and Organizations

- scholarship funds (generally insurance related)
- Insurance Educational Foundation
- Adopt-A-Highway
- public television fundraising
- Toys for Tots
- bears for traumatized children (through fire and police departments)
- blankets for the needy
- Make-A-Wish Foundation
- Habitat for Humanity
- holiday food drives
- Prevention of Child Abuse Foundation
- Children's Hospital
- mocktail party to support Mothers Against Drunk Driving (MADD)
- Children's Garden
- Link to Life (Women Breast Cancer Recovery)
- Golf tournaments or auctions as fundraisers for local charities

Education

Continuing Education

Many CPCUs join local chapters for the educational value they provide. Your chapter's educational programs are a key element in keeping your members interested and active.

- Survey your members. What topics are of interest to them and can they recommend a speaker?
- Sponsor joint meetings with other associations, which can be a good source of interesting speakers.
- Invite community leaders to discuss their areas of expertise. This also helps them to become familiar with the CPCU designation.
- Take advantage of the CPCU Society's leadership and technical programs.
- Refer to the quarterly topic suggestions in the *Chapter Leader News*.
- Network with other chapters.
- Review trade journals, such as *Best's Review*, *National Underwriter*, and *Rough Notes*, for topic ideas.
- Thank and recognize your speakers; they would appreciate a small gift for their time, and the gesture may help get other speakers.
- Use your chapter web site to deliver technical, leadership, and/or career information.
- Contact the Society's Member and Professional Services Department for other suggestions.

I, E, or All-Industry Days

Many chapters consider their I-Days the most important program of the year, both from an educational and financial standpoint.

Assign Responsibility

- Consider assigning annual I-Day chairmanship to a specific chapter officer, such as the president-elect or immediate past president; assign another officer, such as the vice president, to conduct the programs.
- Appoint as many committee members as possible; let them choose their own volunteers with whom to share responsibilities.
- Recruit new designees, along with experienced members, to serve on I-Day committees or task forces.

- Co-sponsor the event with other organizations, such as RIMS, Insurance Women, PIA, or IIAA, to maximize resources and attendance; rotate chairmanship among the organizations.
- Determine a set term of office for I-Day committee members to ensure continuity.

Create an Informative Educational Program

- Offer a program with as many continuing education (CE) credits as possible. Be sure to file for CE credits at least three months in advance. The CPCU Society offers a filing service if you need assistance.
- Pick current "hot" topics that have mass appeal for general sessions. (See www.iii.org for ideas.)
- Have "breakout" sessions with topics geared toward a specific group (i.e. agents/brokers, risk managers, underwriters, claims specialists).

Get Interesting Speakers

- Seek a luncheon speaker from outside the industry, such as a newscaster, sports figure, or local businessperson.
- Invite a guest speaker from the Institutes, CPCU Society, or a current CPCU Society board member.
- Get a well-known keynote speaker (i.e. high-ranking state or federal official, local insurance commissioner).
- Make use of local talent within your chapter.

Marketing

- Devote an entire chapter newsletter to I-Day.
- Use e-mail or the chapter's web page for advertising.
- Invite CPCU and IIA students to attend; mailing labels are available from the Institutes.
- Invite local (or national) press to cover the event.
- Distribute brochures to all local companies and agencies.

Create a Workable Budget and Revenue Sources

- Try to get speakers and/or accommodations to donate their services.
- Negotiate with the hotel or meeting site for discounts.
- Coordinate the use of audio/visual equipment throughout the day to avoid duplicate A/V expenses.
- Get sponsors, via phone calls and mailings, to cover the cost of coffee breaks, printing, postage, speakers, etc. and create different levels of sponsorship (bronze, silver, gold, platinum).
- Be sure to charge enough to cover expenses!
- Sell advertising in programs.
- Include exhibitors (similar to an industry trade show).

Other Ideas

- Advertise I-Day as a major fundraiser for the chapter.
- Donate proceeds to a local or national charity.
- Hold a conferment ceremony in conjunction with your I-Day.
- Recognize an “Insurance Person of the Year” at the I-Day.
- Make it the “highlight” of the year—the place to be and to be seen!

Meetings and Programs

Attendance

- Publicize all meetings at least three months in advance. Advertise meetings for the entire year, if possible.
- Use “telephone trees” to remind members of upcoming meetings.
- Remember that “Location, Location, Location” is a key factor for good attendance. Determine a location as convenient as possible for all members or try alternate locations.
- Offer meetings with CE credits.
- Alternate meetings among breakfast, lunch, or dinner.
- Include spouses or significant others in one meeting per year.
- Offer credit card convenience to members (the CPCU Society has a vendor that provides this service).

- Start a “buddy” program to encourage members to bring other CPCUs who don’t normally attend meetings.
- Offer a “season pass” for meetings to encourage pre-paying and increased attendance.
- Make sure you are ready to begin meetings at the scheduled times.
- Use easy-to-read nametags at all meetings.

Speakers and Topics

- Invite high-profile individuals as speakers (i.e. mayor, insurance commissioner, other politicians).
- Present non-insurance topics periodically, such as personal development, time management, career planning, job hunting etc.
- Partner with other local insurance organizations (IIAA, PIA, RIMS) for meetings and projects.
- Get feedback from members on topics of interest to them or possible speaker suggestions.
- Offer the same topics/speakers at alternate times.
- Devote one meeting to the latest “hot” industry issue.
- Always have a contingency plan (including a backup speaker and location).
- Appoint a committee responsible for planning meetings throughout the year.

Tried-and-True Chapter Ideas

These are ideas for successful meetings that drew good attendance and made money for the chapters that sponsored them.

- Recognize all past presidents and give them engraved pens with the years they served as president.
- Recognize all accomplishments earned by the chapter and install the incoming officers with a champagne toast.
- Hold a meeting inside the office of the largest employer in town. Include a catered lunch.
- Help a local charity by promising to donate \$10 per person based upon attendance of a particular meeting.

- Put members' names in a drawing each time they attend a meeting and hold a grand-prize drawing at the last meeting in June. (The winner must be present to win.)
- Sponsor joint meetings with other groups, like independent agents, RIMS, RIB (Retired Insurance Brains), CLU, Insurance Women, and Claims Managers Association.
- Try rotary clubs, chambers of commerce, CEOs of local companies, risk managers, emergency management agencies, and the national CPCU Society as resources for speakers.

Leadership and Administration

Chapter Leadership

Strong chapter leadership will result in strong chapter programs and activities.

- Begin each new year or term with a planning meeting involving all officers and committee chairmen. Include your chapter's governor, if possible.
- Be sure to send updated lists of your chapter officers and committee chairmen to Malvern. This will ensure that your chapter will receive important information and assistance from national.
- Start planning each new president's term while he or she is the president-elect.
- Create a nominating committee or task force to ensure a pipeline of future leaders.
- Maintain continuity: appoint co-chairmen or several committee members, not just one chairman. Plan for succession of committees.
- Consider using conference calls in lieu of face-to-face meetings. (The CPCU Society has a vendor available.)
- Ask committee chairmen to attend all board meetings to report on their activities.
- Use Circle of Excellence Recognition Program criteria as a guide for chapter planning and activities.
- Establish a "contingency plan" for all chapter events.
- Recognize outstanding volunteers through rewards or recognition at chapter meetings or events.
- Take advantage of your free chapter web page.
- Use resources from the CPCU Society. (See pages 16-17.)
- Budget to send your leader(s) to the CPCU Society Leadership Summit each year.
- Have fun! Your enthusiasm will motivate future chapter leaders.

Finances

Much of your chapter's administrative success hinges on a sound financial plan.

Budgeting

- Schedule a planning conference and create a budget for the entire year of chapter activities.
- Stay within the budget guidelines all year.
- Make All-Industry Day profit-oriented by adhering to an established budget.

Chapter Administration

- Make the office of treasurer, which is responsible for all aspects of chapter accounting, tax, and other financial matters, a two-year position to ensure continuity.
- Use outside audit and tax preparation for proper filing and accounting procedures.

Sources of Funds

- chapter dues
- meetings (meal and/or speaker charges)
- All-Industry Day
- CPCU co-sponsored workshops
- CPCU education classes
- CPCU exam preparation workshops
- special events, such as a golf tournament
- sale of chapter-related merchandise (T-shirts, mugs, etc.)

Other Ideas

- Solicit sponsorship from companies to help with All-Industry Day and special event expenses.
- Include a charge for chapter meetings and meals in the annual dues statement.
- Offer a free meeting and meal to members who pre-pay chapter activities for the year.
- Charge different meeting or meal costs for members and nonmembers; charge a late fee for walk-ins with no reservations.
- Sell advertising in the chapter newsletter or web site.

How to Market Your Chapter

Marketing is the process of planning and executing programs and services that satisfy member needs and meet chapter goals. The basic commandments of marketing are:

1. Follow your plan.
2. Don't assume that people know about your product or service.
3. Word of mouth is your least expensive, yet credible, form of marketing.
4. View any sale as the beginning of a relationship.
5. Use "What's In It for Me?" language.
6. Have a clear message, as people have less time to spend on reading.
7. Know your market.

Experienced chapter leaders suggest the following "best practices" for marketing your chapter:

- Plan special events at least six months in advance.
- Communicate events well in advance. Members should receive 30 days' notice for meetings and 90 days' notice for I-Days.
- Publish an events calendar.
- Use a variety of methods to communicate your message, such as flyers, fax, e-mail, and web site.
- Communicate your message at least three times for maximum effectiveness.
- Make individual follow-up phone calls.
- Use member testimonials in your marketing.
- Include contact information in your written copy so members can call with questions.
- Remind members about the tangible benefits your chapter offers—CE credits, networking, and leadership opportunities.
- Tell members why your program is worth the investment of their time—what's in it for them.

- Use interesting headlines in your written communications, and make sure your copy inspires action.
- Assign a CPCU to act as a Champion at each workplace, and ask that member to promote the chapter to other CPCUs in the office via e-mail or bulletin board announcements.
- Send welcome letters to new members.
- Create a new member welcome kit and send it to CPCUs who move into your area, as well as to all new designees.
- Include biographies of new designees and new members in your chapter newsletter.
- Congratulate new designees with an ad in the *CPCU Society Yearbook*.
- Place ads in the local press recognizing new designees and members; use the national co-op ad program or procure funds from sponsoring companies.

Using Technology

- Use the Society's web page, www.cpcusociety.org, to download chapter rosters.
- Use the online membership feature to update your own records and run chapter reports.
- Collect e-mail addresses for e-mailing meeting notices and chaptergrams. Please share your addresses with national.
- Keep a directory of your members. (Be sure to get updates from national.)
- Print a member directory or create an electronic member directory.
- Take advantage of your free chapter web page.
- Faxing options—fax meeting notices; set up and send overnight when rates are cheaper.

Membership

Candidate Recruitment & Development (CR&D)

CPCU candidates are your future chapter members. By including them in your chapter activities now, you are laying the groundwork for active recruitment once they receive their CPCU designation.

- Set objectives and develop a CR&D plan.
- Get help. Start a committee and appoint a chairman.
- Encourage candidates with four or more completed parts to join the Society as candidate members.
- Hold a candidate meeting to promote chapter involvement.
- Call the American Institute for CPCU at (610) 644-2100, ext. 7853, to obtain chapter candidate reports.
- Offer scholarships; finances may be a factor for some candidates.
- Offer employers the opportunity to hold education classes at their workplace.
- Invite candidates to meetings.
- Involve candidates on Community Good Works projects.
- Participate in a benefits fair.
- Promote CR&D at your chapter I-Days.
- Maintain liaisons with other associations and organizations.
- Communicate and partner with local universities and insurance companies.
- Write congratulatory letters to all completers.

Connections

Employer Support Best Practices for the CPCU Society

One of the priorities in the CPCU Society's strategic plan and Circle of Excellence Recognition Program is to build relationships with members' employers, especially those with five or more CPCUs. This can be accomplished thorough the Connections program with written and personal contact.

Here are some key items to consider:

- Plan now to establish a Connections Committee. Assign a "CPCU Champion" at each of your employers.
- Obtain from national a list of P/C employers employing five or more CPCUs. This can be obtained through Membership Online or by calling the Member Resource Center.
- Work with national to conduct Connections visits with employers who employ five or more CPCUs. Contact national for a "Connections Kit."
- Plan to take advantage of upcoming I-Days and local conferments. Ask for help from Society national leaders conducting the conferments.

The following is a list of best practices of how companies can support the CPCU Society. Provide this message in your written or personal contact.

Education

- Pay for CPCUs' registration fees to Society educational events—Annual Meeting, Leadership Summit, local chapter workshops.
- Send employees to the CPCU Society's Annual Meeting and Seminars.
- Pay for employees to attend CE programs that will benefit both the employee and the organization.

Dues

- Pay for CPCU Society annual dues—national, chapter, sections. Set a corporate policy and encourage regional offices to support your policy.
- Give your CPCUs who retire a lifetime membership as a retirement gift.

Support Your Local CPCU Society Chapter

- Sponsor an event—meeting, speaker, I-Day, lunch.
- Pay for a CPCU's meeting expenses.
- Provide space for chapter meetings.
- Encourage other employees to attend chapter educational events.
- Encourage your employees to be active in their local chapters—it's a way that your employees can hone their leadership, team building, managerial, and presentation skills.

- Reward employees who are active in the Society, especially at the chapter and national levels.
- Provide speakers from your company at Society events such as I-Days.
- Support I-Days through sponsorships, speakers, and time off to attend.

Advertise

- Advertise in the *CPCU Society Yearbook* to recognize new designees.

Sponsor a CPCU Society Event

- Annual Meeting and Seminars event
- Chapter workshop
- Leadership Summit event
- Chapter I-Day

Candidate Development

- Integrate the CPCU program into career paths.
- Encourage employees to begin CPCU coursework.
- Lead by example—encourage upper-level managers to earn their CPCU and take a visible and active role in the local insurance community.
- Support employees who are in the process of getting their CPCU—(pay for coursework, time off for study/exams, etc.).
- Underwrite fees for continuing education programs.
- Underwrite the cost of CPCU tuition/books.

Other

- Communicate CPCU events to employees in your companies—brochures, bulletin boards, career days, e-mail, company newsletter.
- Encourage employees to volunteer for national and local committees/chapters, and provide time off for these activities.
- Offer a bonus or other incentive (going to the Annual Meeting) to employees who earned their designation.

Be sure to report your Connections visits, with employer contact information, to national. The information is valuable in building a database of employer support. Send post-visit reports to: CPCU Society Connections Program, 720 Providence Road, Malvern, PA 19355 or e-mail to membercenter@cpcusociety.org.

Membership

Membership is the lifeblood of your chapter. These best practices will help you keep your membership numbers high year after year:

- Promote the benefits of CPCU Society membership.
- Send the Society’s “thank you” letters to employers to recognize their support of CPCU chapter activities.
- Survey chapter members to determine their needs.
- Recognize candidate mentors.
- Recognize specific accomplishments of members.
- Create a “Professional of the Year.”
- Use “Membership Online” on the Society’s web site to run rosters.
- Recruit demonstrated “strong” leaders from the membership, especially new designees.
- Create “membership kits.”
- Make membership fun.

Acquiring Paid Members

- Form a committee to plan membership recruitment and retention.
- Hold a “Phone-a-Thon” party; make it fun and social.
- Anticipate objections. Remind members of the personal and professional benefits.
- Offer chapter incentives, such as a free meeting if they come back.
- Find lost members via web resources: www.anywho.com; www.yellowpage.com; www.cpcusociety.org.
- Right after the Annual Meeting and Seminars, start recruiting new designees. Give them a chapter orientation and send them a welcome guide.
- Remember that it is never too late to recruit someone.

New Designees

- Make a personal phone call to congratulate new designees.
 - Send a congratulatory letter.
 - Appoint a new designee representative.
 - Appoint a mentor to each new designee.
 - Create a new designee packet including, but not limited to, a list of officers, committee chairmen, membership directory, chapter calendar, recent newsletter, etc.
 - Recognize new designees at a lunch, dinner, or reception.
 - Prepare a press release to the local paper acknowledging the accomplishments of new designees.
 - Recognize your chapter's new designees in a *CPCU Society Yearbook* ad.
- Participate in the cooperative advertising program and use the sample ads from national to recognize designees in the local press.
 - Advise the role of the officers and each chairman.
 - Have a local conferment for new designees (may be in conjunction with I-Day).
 - Offer a gift to new designees (pin, clock, pen, etc.).
 - If possible have a special function (breakfast, lunch, reception) recognizing new designees at the Annual Meeting and Seminars.
 - Encourage involvement in the chapter. Ask new designees to select a committee with which they would like to be involved.