



# Application for CPCU Society Service

- CPCU Society Officer
- CPCU Society Director
- Standing Committee
- Interest Group Committee
- Task Force
- Chapter Governor

Our mission statement defines the future of the CPCU Society. Our success in carrying out that mission depends upon the quality and effectiveness of our volunteer leaders. Your willingness, as a volunteer, to offer your time and talents is vital to our continued success.

There are many ways to apply your skills at the CPCU Society level. For each position, we have included a brief description of duties, time requirements, competencies, and experience desired. For a complete description of each position, the anticipated time and financial commitments required, and competency definitions, visit the CPCU Society Web site at [www.cpcusociety.org](http://www.cpcusociety.org).

Name \_\_\_\_\_

Company \_\_\_\_\_ Title \_\_\_\_\_

Preferred Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-Mail Address \_\_\_\_\_

CPCU Society Member ID # \_\_\_\_\_ Designation Year \_\_\_\_\_

Current Chapter/Interest Group \_\_\_\_\_ Region \_\_\_\_\_

## Personal Data

*In addition to completing the sections below, please attach your résumé or curriculum vitae.*

## Volunteerism and Continuing Education

*If you have held the same office or volunteer position for non-consecutive terms, please list each separately and indicate year served.*

Highest CPCU Chapter Office Held/Year: \_\_\_\_\_

Chapter Committee Work: \_\_\_\_\_

Highest CPCU Society Position Held/Year: \_\_\_\_\_

CPCU Society Committees/Interest Groups/Task Forces/Year: \_\_\_\_\_

Other Professional Designations: \_\_\_\_\_

Other Insurance Activities: (organization/highest office/year): \_\_\_\_\_

Other Volunteer Activities/Achievements/Special Awards/Publications/Year: \_\_\_\_\_

Insurance-Related Studies/Year: \_\_\_\_\_

## References

*All candidates expressing serious interest will provide the names of two to three references, including their e-mail address or phone number at a minimum.*

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## Commitment Statement

Please summarize your professional competencies and how you will use them to further the Society's mission (200–250 words or less).

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## Loman Club Member

- Yes**, I am currently a member of the Loman Club.       **No**, I am not a member of the Loman Club.
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## Candidate Interests

### Elected Offices (Check All That Apply.)

The name of the applicant receiving a nomination for these positions will be submitted to Society membership for election.

**CPCU Society Officer:**

**Vice President** (Four-Year Commitment. Application Deadline: December 31)

Desired experience for this position includes leadership roles in local chapters and/or interest groups, and CPCU Society committee or task force work. Demonstrated leadership experience in business, professional, or nonprofit organizations is also required. If nominated, the applicant is expected to be highly visible, represent the Society at various public functions, attend all required meetings, and automatically move into the president-elect, president, and immediate past president offices. Desired competencies include high energy, vision, organizational and interpersonal skills, and the ability to command, communicate, and motivate.

**Secretary** (Three-Year Commitment. Application Deadline: December 31)

This position shall be responsible to keep an accurate record of all meetings of the Society, the Board of Directors, the Executive Committee and the Audit Committee. The Secretary helps interpret the bylaws and makes sure the organization complies with any regulations pertaining to not-for-profits. Attendance at all CPCU Society Board and Executive Committee meetings is required.

**Treasurer** (Three-Year Commitment. Application Deadline: December 31)

This position shall chair the Budget & Finance Committee, submit periodic financial statements to the Board of Directors and to the members of the Society, and assure that financial accounts of the Society shall at all times be open to the inspection of any member and of any authorized auditors. Attendance at all CPCU Society Board and Executive Committee meetings is required.

**CPCU Society Director** (Three-Year Term. Application Deadline: December 1)

This position addresses CPCU Society concerns. Attendance at all CPCU Society Board meetings is required. Demonstrated leadership experience in business, professional, or nonprofit organizations, and local chapter or CPCU Society committee/task force is suggested.

**Chapter Governor** (Three-Year Term. Application Deadline: December 1)

This position serves as a liaison between the Board of Directors and the chapters and they facilitate communication between the Board and chapter officers. Attendance at all chapter governors meetings is required.

## Work Experience and Leadership Roles at Work

Please elaborate on the content of your résumé by providing two to three specific examples demonstrating leadership skills, such as influencing others, building relationships, or being innovative (200–250 words or less).

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**Appointed Positions: (Check All That Apply)**

Appointed positions include CPCU Society Standing Committee and Interest Group Committee service.

**Standing Committees** (Nominating Committee Application Deadline: Dec. 31; Other Standing Committees Application Deadline: April 15)

- Budget & Finance     Diversity     Ethics     Nominating ()

Four Standing Committees are focused on the ongoing needs of the Society. CPCU Society committees do not change from year to year. A commitment to promote the best interests of the CPCU Society is required. For Budget & Finance, applicants should have appropriate functional skills.

**Interest Group Committees** (Application Deadline: April 15)

Interest groups operate within the organizational framework of the CPCU Society and support the overall Society mission. Their specific focus and perspective are centered on common issues affecting their interest groups. Many of their activities relate to the educational needs of their interest group members. This position requires attendance at all CPCU Society meetings. Typical projects include seminars, symposia, publications, newsletters, and research. Desired competencies include functional/technical skills, business acumen, planning, and organizing.

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|---|---|--|
| <input type="checkbox"/> Agent & Broker                           | <input type="checkbox"/> International Insurance            | <input type="checkbox"/> Reinsurance     |
| <input type="checkbox"/> Claims                                   | <input type="checkbox"/> Leadership & Managerial Excellence | <input type="checkbox"/> Risk Management |
| <input type="checkbox"/> Consulting, Litigation, & Expert Witness | <input type="checkbox"/> Loss Control                       | <input type="checkbox"/> Senior Resource |
| <input type="checkbox"/> Excess/Surplus/Specialty Lines           | <input type="checkbox"/> Personal Lines                     | <input type="checkbox"/> Underwriting    |
| <input type="checkbox"/> Information Technology                   | <input type="checkbox"/> Regulatory & Legislative           |  |

**Task Forces**

Task Forces are created by the CPCU Society Board of Directors to advance the Society's strategic objectives and address specific interests or needs within a six- to eighteen-month timeframe. Task forces research specific issues and provide the Board with recommendations about viable options and potential action plans. Typically, task forces meet twice a year: once at the Annual Meeting and once in the spring, in conjunction with the Society's Leadership Summit. Additional meetings are called at the discretion of the task force leader, and may be conducted virtually.

Please indicate your participation preference:     Task Force Chair     Task Force Member

**I have skills and interests in the following areas: (check all that apply)**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Annual Meeting          | <input type="checkbox"/> Human Resources          | <input type="checkbox"/> Publications                     |
| <input type="checkbox"/> Audit/Budget/Finance    | <input type="checkbox"/> Information Technology   | <input type="checkbox"/> Public Relations                 |
| <input type="checkbox"/> Bylaws Knowledge        | <input type="checkbox"/> Leadership Development   | <input type="checkbox"/> Public Speaking                  |
| <input type="checkbox"/> Candidate Development   | <input type="checkbox"/> Marketing                | <input type="checkbox"/> Regulatory & Legislative Matters |
| <input type="checkbox"/> Candidate Recruitment   | <input type="checkbox"/> Membership               | <input type="checkbox"/> Research/Statistics              |
| <input type="checkbox"/> Chapter Operations      | <input type="checkbox"/> Negotiation              | <input type="checkbox"/> Strategic Planning               |
| <input type="checkbox"/> Communications Strategy | <input type="checkbox"/> Parliamentary Procedures | <input type="checkbox"/> Other                            |

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**Submit completed application and all attachments in one of the following ways:**

**Mail:** Chief Executive Officer, CPCU Society, 720 Providence Road, Malvern, PA 19355

**E-mail:** mdrager@cpcusociety.org (all files in Microsoft Word)

**Fax:** (610) 251-2761; Attention: Chief Executive Officer