

Interest Group Circle of Excellence Recognition Program

The Circle of Excellence Recognition Program provides interest group (IG) leaders with structure and guidance to achieve strategic, IG, and member goals. The Institutes CPCU Society looks forward to recognizing IGs for all of their hard work, innovative ideas, and accomplishments during the year and then acknowledges their achievements!

Seven Reasons to Participate in the Circle of Excellence Recognition Program

1. Grow your IG by delivering value and services to members in the areas of technical education, promoting high professional qualifications of CPCUs, and promoting risk management and insurance as a career.
2. Receive direction for the year through the Circle of Excellence program, which is an excellent planning guide.
3. Support the CPCU Society's Strategic Plan. The Circle of Excellence provides a blueprint to help IGs align their efforts with the Society's goals and initiatives in each area of emphasis.
4. Focus your efforts. The activities are good suggestions for IG programs and facilitate delegation and accountability.
5. Earn recognition for your IG. IGs are recognized at The Institutes CPCU Society Leadership Summit, in the *CPCU Society News*, on the Society's website, and on your IG web page.
6. Write your history! The Circle of Excellence report is an excellent record of the IG's achievements for the year. It can be an important resource for future leaders and those who are interested in tracking your activities and progress of the interest group over time.
7. Share your successes and contribute to IG best practices.

The Circle of Excellence revolves around these three goals:

- Promote insurance and risk management education and the CPCU® designation via outside activities (events not sponsored by the CPCU Society)
- Promote the CPCU designation and the IGs via CPCU Society-oriented activities
- Engage in stewardship to promote the CPCU designation and the IGs

Each goal includes suggested activities that strategically support it.

Circle of Excellence Recognition Program Submissions

Planning:

- Start early! Many IGs use The Circle of Excellence Recognition Program criteria as the agenda for their planning. Hold a formal planning session.
- Delegate! Assign volunteers to committees or task forces early in the year.
- The activities listed on the IG Circle of Excellence Recognition Planning and Activity Reporting Form are suggestions. Work with your committee members to determine which will be most effective for you. Enlist the help of your governor for ideas about ways to improve your IG value and set realistic goals. Invite your governor to attend your planning meeting or arrange for a conference call connection, if possible.
- Document and track progress throughout the year—don't wait until the last minute.

Reporting:

- Activities must be completed between January 1 and December 31 of the applicable year to receive credit.
- Submit your report in the manner and by the deadline specified by your IG governor. For questions about the Circle of Excellence Recognition Program, contact your IG governor.

Interest Group Circle of Excellence Recognition Program

Mission Statement:

The Circle of Excellence Recognition Program is a tool that IG leaders should use to encourage innovation in adding value to IG membership, to recognize contributions to the CPCU Society, and to offer education to the insurance and risk management industry.

A. Interest Group recognition

IG recognition is awarded in levels of platinum, gold, and silver based on a point system. Points are awarded on the basis of activities conducted by the IG s and their subsequent results. The results will align with the annual strategic goals of the CPCU Society.

Awardable points are listed on the **IG Circle of Excellence Recognition Planning and Activity Reporting Form (Reporting Form)**. Those points should be based on quantitative and/or qualitative work. The Reporting Form provides a range of points that can be earned for the results in each category. Point spreads for the recognition levels are listed below:

Platinum 200+

Gold 199-150

Silver 149-100

For example, assume an IG engages in the following activities:

Goal #1:

Workshop	10 points
Webinar	10 points (two webinars)
Article in non-CPCU publication	5 points
Total	25 points

Goal #2:

Article in Insights	10 points (two articles)
Article in CPCU Society News	10 points (five articles)
Annual Meeting seminars	20 points (two seminars)
Website enhancement	5 points
CPCU webinar	20 points (4 webinars)
Total	65 points

Goal #3:

Interactive event with another IG	10 points (two events)
Email outreach	10 points (copies of specific emails required) (five emails)
Staff new designee open house	5 points
Staff chapter event	5 points
Outreach to employers	5 points
Total	35 points
GRAND TOTAL	150 points

This hypothetical IG is an active one, and it would earn the gold award. Note that the criteria to meet platinum and gold are a bit more demanding than in the past.

To be considered for recognition, each IG must complete and submit the attached IG Circle of Excellence Recognition Planning and Activity Reporting Form (Reporting Form).

The Reporting Form must include explanations of the various activities that are completed as part of the overall activity that supports the related goal, as well as any survey results associated with those activities. The explanations should include why each item merits the requested score. For example, for a symposium, include the date; place; number of attendees; rating and CE information, if applicable; who benefited from the symposium; and any survey results. For journal articles or other publications, please provide the article title, author, and date published. Additional item numbers and lines can be added under each activity as needed. It is not necessary to complete activities and results under each overall goal activity to be considered for recognition.

Activities eligible for consideration will meet the general criteria of adding value to IG membership as well as to CPCU Society membership in general, and promoting visibility of the CPCU Society. If applicable, please indicate which industry associations or groups were reached. Activities and results of all IG members (not just IG Committee members) are eligible for consideration *if promoted by the IG for the benefit of its members*.

To assist in the quantification of activities, the expected results of the activity must be included. Submissions should articulate how activities have helped support the expected result described.

Some activities may seem redundant on the surface, such as the webinars. But Goals 1 and 2 are very different. For example, say that a member develops or presents a RIMS webinar and a CPCU Society webinar. The IG should get credit for both, although the RIMS one would garner fewer points.

Activities performed by IG members that relate directly to their normal work activity rather than CPCU Society activity will generally receive fewer points. Remember, recognition is extended only to activities completed within the reviewing year, which runs January 1 through December 31.

B. Goals And Corresponding Activities

Goal #1: Provide Relevant Knowledge via Outside Activities (Events Not Sponsored by the CPCU Society)

Expected Results

1. Provide access to insurance knowledge on current industry issues to a broad audience
2. Provide opportunities to apply the current insurance knowledge to individuals' own careers. Provide access to current insurance knowledge by promoting CPCUs as mentors and subject matter experts

Corresponding Activities:

Conduct Symposia or Workshops: Five to twenty points can be earned for each event presented to an association or another group by the interest group. A maximum of forty points can be awarded in this category. These are programs that have been developed by an interest group or interest group member, are adapted to the group's needs and expectations, and are presented to a broad audience. Consideration will be given to the audience, attendance, quality, complexity, and originality. For clarification purposes, the following definitions apply:

- Symposium—a formal meeting at which experts discuss a particular topic. Time frame should be a minimum of a half day. Symposium must occur outside the CPCU Society Annual Meeting or CPCU Society Leadership Summit.
- Workshop—a class or series of classes in which insurance or risk management professionals learn about a particular topic. A workshop is typically of shorter duration than a symposium.

Conduct Webinar(s): Five points can be earned for each non-CPCU Society-sponsored webinar that an interest group member presents to an association or another group. A maximum of twenty points can be awarded in this category. These can include programs that are have already been developed by an interest group, are adapted to the group's needs and expectations, and are presented to a broad audience. Consideration will be given to attendance, quality, complexity, and originality.

Publish Articles (in Non-CPCU Society Publications): Five to ten points will be awarded for each article published in a non-CPCU Society publication. A maximum of ten points can be awarded in this category. Please provide the name of the publication, length of the article, issue date, title of the article, author, and audience for the article. These articles must be available for public review—in other words, not within intercompany publications.

Open—Creative Activity: One to five points may be awarded for any related activity under Goal 1 that is not listed for any activity above. Creativity is encouraged and should not be stifled by the categories. Creative activities that introduce a new idea or concept or that are performed in a different or unique way will typically qualify for more points. The activity should produce a tangible result or have a positive, measurable impact on *The Institutes or CPCU Society*. Please submit a description of your activities and their results for consideration.

Goal #2: Empower Professionals to Succeed via CPCU Society-Oriented Activities

Expected Results

1. Attract more professionals into the specific discipline, into the CPCU program, into an interest group, and into CPCU Society membership
2. Promote the professional qualifications of CPCUs

Corresponding Activities:

Publish Article in *The Institutes CPCU Society Insights*: Five to ten points can be awarded for each article the interest group publishes during the award period. A maximum of twenty points can be awarded in this category. More substantial articles will merit more points. The title of the article, length of the article, author, and the date published should be specified.

Publish Article in *CPCU Society News*: Two to four points can be awarded for each article the interest group publishes during the award period. A maximum of ten points can be awarded in this category. More substantial articles will merit more points. The title of the article, the author, and the date published should be specified.

Conduct The Institutes CPCU Society Annual Meeting Seminar: Five to ten points can be awarded for each seminar developed by the interest group. Consideration will be given to the quality, complexity, and originality of the seminar presented. Consideration will also be given to sole sponsorship and development. A maximum of forty points can be awarded. Please specify the title of the seminar, the speaker(s), the date, and the approximate attendance. Please indicate whether the seminar is co-sponsored or is an individual interest group effort, as well as whether the seminar is an updated version of a previously successful seminar.

Conduct CPCU Society Webinars: Five points will be awarded for each webinar the interest group produces during the award period. A maximum of thirty points can be awarded. Please specify the title of the seminar, the speaker(s), the date, evaluation and approximate attendance. Please indicate if the webinar is co-sponsored or is an individual interest group effort.

Enhance CPCU Society Interest Group Website: One to five points can be awarded for each update made to the interest group website to increase member value. A maximum of ten points can be awarded in this category. More substantial updates will merit more points. Please explain the update and the dates in which they occurred.

Open—Creative Activity: One to five points may be awarded for any related activity under Goal 2 that is not listed above. Creativity is encouraged and should not be stifled by the categories. Creative activities that introduce a new idea or concept or that are performed in a different or unique way will typically qualify for more points. The activity should produce a tangible result or have a positive, measurable impact on *The Institutes or CPCU Society*. Please submit a description of your activities and their results for consideration.

A research project can be placed in the Creative Activity category. Up to twenty points will be awarded for each original research project completed and submitted within the time period. The project must meet the requirements listed in the bullets that follow. Consideration will be given to quality, complexity, and current applicability.

- The goal statement must be clearly indicated at the beginning of the paper. The statement should be consistent with the goal of delivering new and useful information to the members of the CPCU Society and to the insurance industry as a whole.
- The paper should be organized to include sections for Table of Contents, Introduction, Statement of Purpose, Body of Report, Summary/Conclusions, Bibliography and/or Suggested Readings (if needed), and Appendix (if needed).
- The paper should employ professional standards of style for a research paper—for example, see Kate L. Turabian, *A Manual for Writers of Term Papers, Theses and Dissertations* (6th ed.).
- The paper should be factual in nature, which means that it should be based on verifiable facts.
- The research and analysis should be of a professional quality—in other words, it should be logical and contain in-depth analysis and/or survey(s). The paper should be written primarily by one or more CPCUs who are members of the interest group submitting the paper.
- Provide the name of any publication containing the report, the author, and the title of the research project.
- Include a description of the target audience.
- The length should be at least ten pages on 8 ½ x 11” paper, with a twelve-point font, double-spaced.

Goal #3: Engage Future Generations of Leaders

Expected Results

1. Increase the number of CPCU Society members engaged in and contributing to interest groups and their programs
2. Promote risk management and insurance as a career

Corresponding Activities:

Engage in Interactive Events With Other Interest Groups: Up to ten points will be awarded for interactive events (such as webinars, workshops, and social events) with other interest groups.

Email Outreach: Up to ten points will be awarded for emails prepared and distributed to promote participation in the interest group or in the Society, to educate, or to otherwise achieve the Society’s strategic goals. The results of this outreach should be included.

Telephone outreach: Up to five points will be awarded for telephone campaigns developed and implemented to promote participation in the interest group or in the Society, to educate, or to otherwise achieve the Society’s strategic goals. The results of the campaign should be included.

Staff Annual Meeting New Designee Open House: Every one-person hour devoted to staffing the new designee open house booth will be awarded one point. A maximum of five points will be allowed for this activity.

Staff Chapter Events at I-Day and Other Chapter Activities to Promote the Interest Groups: Every one-person hour devoted to staffing an I-Day booth will be awarded one point. Activities such as brief speeches at chapter luncheons to explain and promote the interest groups will garner points. In addition, writing an article about the interest groups for Chaptergrams or chapter newsletters will also be awarded points. A maximum of five points will be allowed for this activity.

Outreach to Employers: Interest group members who engage in outreach programs to employers can earn up to five points. The outreach program should promote the interest groups or the CPCU designation and membership in general. The date of the activity, the name of the employer, and the name of the interest group member should be provided, along with a brief description of the discussion.

Open—Creative Activity: One to five points may be awarded for any related activity under Goal 3 that is not listed above. Creativity is encouraged and should not be stifled by the categories. Please submit a description of your activities for consideration. The results of this activity should be included. Creative activities listed under Goals 1 or 2 cannot be listed twice.