

## 1. Provide Relevant Knowledge

	Goals	Initiatives/Business Owners	Key Deliverables/ Milestones	Year-End Chapter Status (Due: January 31, 2017)	Chapter Governor Year-End Feedback
1.1	<ul style="list-style-type: none"> <li>Minimum of two events are held per year. Examples include:               <ul style="list-style-type: none"> <li>Chapter/interest group-partnered events</li> <li>Chapter/other insurance organizations-partnered events</li> <li>Workshops/symposiums</li> <li>I-Day events</li> </ul> </li> </ul>	<p>I-Day/I-Day Committee</p> <p>CPCU 530 Class or another applicable class – Offer this workshop to assist candidates in successful completion of CPCU 530/Candidate Development Committee</p>	<p>Tentative date September 8, 2016 at Reynolds Alumni Center</p> <p>Fall 2016</p>		
1.2	<ul style="list-style-type: none"> <li>Meet the following 2016 recruitment/retention goals:               <p>Total chapter members of 185 by December 31, 2016</p> <p>The breakdown of the (TBD) member goal by member category is as follows:</p> <ul style="list-style-type: none"> <li>New designees (2016): 3</li> <li>New designees (2017): 11</li> <li>Regular members: TBD</li> <li>Regular retired:</li> <li>Lifetime retired:</li> <li>Candidates:</li> <li>Affiliates:</li> </ul> </li> </ul>	<p>This goal determined by The Society/Membership Committee and New Designee Committee</p>	<p>Contact with lapsed members by April 30, 2016</p>		

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1.3	<p>Membership conversion rate for new designees of 51% by December 31, 2016</p> <p>Membership retention rate of 94% by December 31, 2016</p> <p>NOTE: The CPCU Society's recruitment and retention goals will be communicated in late Q4 2015, along with guidance on how chapters should define the breakdown of the member goal by member category.</p>	<p>Congratulatory email with information about the chapter to new designees/New Designee Chair</p>	<p>Letters sent when notice is received from The Society</p>		

## 2. Empower Professionals to Succeed

	Goals	Initiatives/Business Owners	Key Deliverables/ Milestones	Year-End Chapter Status (Due: January 31, 2017)	Chapter Governor Year-End Feedback
2.1	<ul style="list-style-type: none"> <li>Leadership transition/ succession plan in place and implemented annually. Elements of the plan include:               <ul style="list-style-type: none"> <li>Transition checklist</li> <li>Training plan for incoming officers</li> <li>Role descriptions for officers/committee chairs</li> </ul> </li> </ul>	Transition Plan Created and Implemented/Chapter Board  Officer and Committee Chair role descriptions updated/Chapter Board and Committee Chairs	Plan reviewed by September 30, 2016 and updated and approved by December 31, 2016		

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2.2	<ul style="list-style-type: none"> <li>Minimum of two chapter officers attend the Leadership Summit annually.</li> </ul>	Pay for one officer to attend and half of travel expenses for second officer/Chapter Board member to attend	Two officers in attendance at April 2016 Leadership Summit.		

2.3	<ul style="list-style-type: none"> <li>Chapter operating plan is defined and submitted for 2016 no later than December 31, 2015.</li> </ul>	Plan developed and submitted/Chapter Board	Plan developed and submitted by December 31, 2015.		
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### 3. Engage Future Generations of Leaders

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3.1	<ul style="list-style-type: none"> <li>Minimum of two events per year are held. Examples include:               <ul style="list-style-type: none"> <li>Networking events (e.g., conferment celebrations)</li> <li>Chapter meetings</li> <li>Chapter/interest group-partnered events</li> </ul> </li> </ul>	Seven Monthly Meetings held in 2016/Programs Committee  New Designee Luncheon /New Designee Committee  Good Works Event to allow networking opportunity for members while giving back to the community/Good Works Committee	Chapter Meetings held in the months of February, March, April, May, October, November, and December  New Designee Luncheon held prior to Annual Meeting  Good Works event held by December 31, 2016		
3.2	<ul style="list-style-type: none"> <li>Chapter website is current and accurate.</li> </ul>	Post monthly meeting information, 1-Day details, Chapter events, Chapter Grams/Website Committee	Monthly website updates		

<b>3.3</b>	<ul style="list-style-type: none"> <li>Members are communicated with 10 times per year (e.g., via Chapter Grams, e-mail and social media updates).</li> </ul>	Regular communication with members/Chapter President, Chapter Secretary and Website Committee	<p>Meeting invitations sent to members by email throughout 2016</p> <p>Chapter Grams posted to website at least 2 times a year</p>		
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<b>3.4</b>	<ul style="list-style-type: none"> <li>Student member engagement plan is defined for chapters that have a Gamma Iota Sigma chapter linked to theirs and that have student members.</li> </ul>	Work with Fred Travis to develop connection with new Gamma Iota Sigma chapter being established/Candidate Development Committee	Quarterly contact with Fred for updates on status.		

<p><b>3.5</b></p>	<ul style="list-style-type: none"> <li>A volunteer recognition plan is defined and implemented annually.</li> </ul>	<p>Execute plan for volunteer recognition program/Chapter Officers</p>	<p>Complete volunteer recognition plan by December 31, 2016</p>		
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